

Ready, Aim....

RSU18 Customized Learning Implementation Case Study

Regional School Unit 18 is a far-flung district straddling the Kennebec River Valley in central Maine. It was consolidated on July 1, 2009, and comprises Oakland, China, Sidney, Belgrade and Rome. It has a population of approximately 3,100 students, PreK-12. The majority of RSU 18's high school students – numbering 810 – attend Messalonskee High School in Oakland. High school-age students in China are given a choice of area schools to attend. Since the spring of 2010, the district has been in what the administration calls phase one of a planned implementation of reforms centered on proficiency-based education¹ and customized learning. The purpose of this phase is to “establish strategic direction.” At the time of this writing, spring of 2012, the district is on the verge of entering phase two, or “strategic implementation and organizational alignment.” The goal of phase two is to implement a customized-learning model throughout the district. This case study explores how the district has navigated the implementation of this model up to this point. For this case study, 17 teachers and administrators from a variety of buildings and grade levels were interviewed in January 2012.

Ready, Aim....

In May 2009, administrators, board members and teachers of the soon-to-be-created Regional School Unit 18 participated in a series of conferences held by the Reinventing Schools Coalition (RISC), a group of educators providing training in a particularly concise model of proficiency-based education that they had developed and successfully implemented in their home state of Alaska. The idea, according to Assistant Superintendent Linda Laughlin, was that the district was just “collecting information.” This was an appropriate and prudent position for a district that had an awful lot going on, including – along with the very creation of the district – the hiring of new superintendent, Gary Smith. Consolidation of the school systems of MSAD 47 (Oakland,

¹ A number of phrases are used to designate the instructional practices discussed in this website and in these case studies, including “standards-based,” “performance-based” and “competency-based,” as well as “customized learning” and “student-centered.” For the most part in these case studies and web pages, we use our preferred term “proficiency-based education.” But we include the other designations in direct quotes or within a primary source document and do not intend any specific distinction by our use of these terms.

Belgrade, Sidney and Rome) and those of China required a lot of what Smith refers to as “heavy lifting.” Policy, finance, contracts and governance all had to be wrestled with at the ground level. At the same time, the economies of the world were threatening collapse, and “budget season” throughout Maine became an all-consuming adventure. A lot was going on at RSU 18.

Critical Ideas

Over that year, though, every faculty member, every school board member, every administrator and most of the support staff, attended the introductory training, Understanding the Model, which makes the theoretical and moral case for a shift to a comprehensive system of proficiency-based education. The system is based in mission and vision work, shared leadership, and an ethic of continuous improvement. It presents a model in which learners are given voice and choice in how and when they meet a transparent set of achievement standards. Learner advancement no longer happens according to a learner’s age. Rather, it is based on achievement. For example, when a 10 year old, demonstrates that they’ve mastered level three of the geometry standard, they move on to level four, regardless of what other 10 year olds are doing. Similarly, a 10 year old who has not demonstrated that they’ve mastered that level will continue to receive instruction and coaching and will continue working until they do demonstrate mastery. Every child *learns* at his or her own pace, therefore every child moves at his or her own pace.

At the same time district employees were encountering these ideas, RSU 18, like many districts in the state, explored other similar approaches, folding them together and making something of its own. *Inevitable*, written by Bea McGarvey and Chuck Schwahn (2011), presents a model of education, called *mass customized learning*, which argues that, for the first time, technology makes it possible to provide and track the sort of individualized, learner-driven educational experience that sees student achievement as inevitable rather than variable. It makes an argument that has been both persuasive and hopeful. To quote Linda Laughlin, “*Inevitable* let me know it could be done.” It has since become common around the district to refer to the whole set of reforms discussed here as “customized learning.” Another important work floating around the district, and the subject of reading groups and professional development, was *The Art and Science of Teaching*, by Robert Marzano, which focuses on proficiency-based instruction and formative assessment. For many teachers, administrators and parents in RSU 18, this confluence of ideas was thrilling. Add Tony Wagner’s *The Global Achievement Gap* – which argues that the American school system has become dangerously outdated and ineffective at producing graduates who can function with facility in the 21st century – and a genuine sense of urgency emerged.

A Change Model

Superintendent Gary Smith had been involved in organizational change in his pre-superintendent’s life in the private sector. He knew that true systemic change involved

not only a vision and a sense of urgency, but also a good amount of “heavy lifting.” He knew that systemic change does not occur by happenstance. The model embraced by RSU 18 is that propounded in the 2010 book, *Total Leader 2.0* (Schwahn & Spady, 2010). The book argues that successful systemic change is possible only if the leadership succeeds in doing five things: 1) articulating a compelling purpose for the change, 2) presenting a concrete vision of the change, 3) creating widespread constituent ownership of the change, 4) creating constituency/staff capacity for change and 5) providing tangible and sustained support for change.

Throughout the period of trainings in which the district was “collecting information,” the district was beginning to enact these steps. With the newly consolidated district settling into itself, RSU 18 pursued the customized learning model in a non-prescriptive, organic way. Action occurred on five particular fronts: 1) making the case for change, 2) establishing a mission and vision, 3) developing partnerships with other districts, 4) providing focused professional development and 5) piloting programs in the schools. The first two of these mirror clearly the *Total Leader 2.0* steps of establishing purpose and vision. The visioning process and the ongoing professional development (described below) address the ownership and the capacity of all stakeholders to make systemic change. The professional development and pilot programs demonstrate the beginnings of district and community support for this change. All of this happened between the fall of 2010 and the spring of 2012.

Purpose, Vision and Ownership

When the district had been in the process of consolidation – still exploring merger options with other towns that, in the end, opted out – the candidate districts framed an educational mission and vision. Initially, the nascent RSU 18 decided to function under the makeshift mission and vision, but in March 2010, consultant Mary Jane McCalmon was hired to lead a proper Future Search – a protocol by which the community discusses and comes to an agreement on what the values and outcomes of their school district should be. Eighty students, teachers, administrators, board members, parents and community members participated. The shared vision that was produced, formally adopted by the school board in October 2010, contained a number of key customized learning ideas. For example:

RSU 18 is a community where...

- All students are prepared to succeed in society by demonstrating mastery of a common set of rigorous standards.
- All students engage in creative and innovative learning strategies. They use technology and other tools to connect to the world outside the classroom.
- Students pursue multiple pathways inside and outside the classroom to achieve their learning goals. Learning takes place without boundaries of time and space.

In an accompanying document produced at the same time, “RSU 18 Core Values and Beliefs,” the ideals of customized learning are even more explicitly asserted. Supporting a “learner-centered educational system,” the document includes the following points:

- We believe that clear and measurable standards should exist for all students and that our curriculum, instruction, assessment and professional development should align with these educational standards.
- We believe that a standards-based system should measure each student against this set of clear expectations.
- We believe that school schedules should be flexible, allowing students to learn without boundaries of time or space.
- We value a wide variety of personalized educational opportunities for all students. These include using individualized learning plans, multiple pathways, flexible grouping and standards-based programming.
- We believe students should be grouped by proficiency levels rather than age/grade levels.

These foundational statements did not have the binding power of policy, but for teachers and administrators looking for direction and encouragement, these provided clear signposts. The school board adopted these vision and belief statements unanimously, another powerful statement not only about the content of the vision, but also about the process that brought it about.

Purpose and Vision: Making the Case for Transformation

Since as early as 1997, when the Maine *Learning Results* standards were first adopted, educators in Maine have been making the case for proficiency-based education. In RSU 18, specific professional development initiatives – e.g., literacy work, or curriculum development aimed toward a Local Assessment System – were very much in line with what has come to be called customized learning. The districts that came together to make up RSU 18 had traditions of embracing reforms. These programs, engaged in over time, “really fit together,” according to one teacher, and presaged the ideas they encountered at the RISC trainings. These ideas resonated with the educators of RSU 18.

The mission and vision developed in the Future Search laid out a case that addressed theory, outcomes and politics. They also encompassed a moral imperative. Theoretical concerns reflect understandings of how, according to research, learners learn; outcome concerns reflect a desire for greater achievement from learners; political concerns reflect a desire for the educational system to be accountable to the citizenry, and to support the goals of the citizenry, on a number of levels (e.g., meeting needs of kids, being fiscally responsible, equity, etc.). Additionally, the argument for customized learning took on a moral dimension. If we *can* do better by kids, says the moral argument, we *must* do better by kids.

According to one teacher, “Students have always known that there was a fundamental unfairness in school, but everyone just assumed, ‘That’s how school is.’ But they thought change was impossible, or maybe that change could come for our children’s children. Now we see that change is happening now.”

A number of educators pointed to their own experience of school during their childhoods, or direct experience with learners and classrooms. In a very personal instance, a school board member related that her support for this reform – indeed her impetus to join the school board – came from her experience with a student – a friend of her daughter’s – who became homeless in his last years in high school. Because the boy was charming and worked genuinely hard throughout his school career, he was consistently passed along to the next grade. But he had never mastered the skills necessary to succeed, especially in math, which can have disastrous consequences in high school and beyond. A system with clearly articulated standards and learning targets – and teachers with the resources and skills to take every kid to mastery – would have addressed such a dilemma, she felt.

From the beginning, a number of teachers brought what they learned in their trainings into their classrooms. Their experiences became an argument for continued progress. Elizabeth Firnkes, a fifth grade teacher at the James Bean School in Sydney, may have begun this journey because the ideas “just made sense,” but she continued because of what she saw in her class as she and the fifth grade team implemented a pilot. “Kids are excited about school,” she says. “They come back from vacation or Christmas break, and they want to be at school. The kids’ excitement is the driving force. They’re learning not just about the content, but about themselves as learners and human beings.” Shelly Moody and Valerie Glueck, who team-teach at Williams Elementary in Oakland, have similarly been thrilled by student appreciation for “voice and choice,” for articulating their learning goals and for deciding how they will demonstrate meeting those goals. Dave Boardman reported similar enthusiasm in his high school pilot – including an ELA video project about customized learning created by a student. Because of this kind of experience, Bobbi Farrell, conducting an eighth grade pilot at Messalonskee Middle School, said, unequivocally, “I would never go back to the old way of doing it.”

This sentiment has become more common as the district has publicized these pilots and engaged in other promotional activities such as targeted discussions at parent nights, the continued mission and vision process, “fireside chats” with faculty, and passionate advocacy by administrators, parents and students. Examples of this advocacy include the following:

- Parent John Dewitt wrote an editorial about customized learning for *The Messalonskee Messenger*, the district newspaper.
- In October 2011, at a community gathering to check the district’s progress, parents and community members said, “We have to do this. What’s holding us up?”

- Messalonskee Middle School Principal Mark Hatch visited the James H. Bean School fifth grade class, site of one of the most vibrant pilots in the district. There, according to teacher Elizabeth Firnkes, a young (“precocious”) girl said words to this effect: “So, Mr. Hatch, how do you suppose you’re going to meet our needs as learners when we’ve been fully immersed in this system, and we might get a teacher who is more traditional...how are you going to meet our needs?”

By the spring of 2012, the necessity for the implementation of customized learning was understood to a wide enough extent that one could say, as Superintendent Gary Smith did, “The district knows this has to happen.”

Building Capacity: Partnership with Other Districts

RSU 18 joined a collective of districts that would become the Maine Cohort for Customized Learning in the summer of 2010. At that time, there were six members. Two years later, in the spring of 2012, 14 school districts comprised the MCCL, accounting for over 25,000 of Maine’s students (13.6 percent). Membership has added to RSU 18’s capacity to implement this change by allowing the sharing of resources, expertise and collective wisdom.

The amount of professional development required thus far has been considerable. Every staff member in the district has participated in the introductory *Understanding the Model* training. The goal has been for all staff to participate in the next in the series, *Classroom Design and Delivery* (CDD, or Beacon), and for key staff to participate in *Instructional Design and Delivery* (IDD, or Beacon II). Since other cohort members were attempting professional development of a similar magnitude, they were able to come together to take advantage of economies of scale. It would be challenging for one district to train 100 teachers – aside from the cost, there is the problem of finding substitute teachers and having 100 teachers out of their classrooms – but the cohort could manage such numbers. Over time, cohort members, including RSU 18, have enacted a train-the-trainer model and have begun to conduct trainings internally. Another way in which the cohort used economies of scale is in pooling resources to bring expertise to the table. Organizational challenges led the cohort to hire a project manager, Brett King, to coordinate the development of a technology framework for tracking and reporting learners’ progress towards standards, as well as coordinating a communications platform for cohort members to share documents and engage in discussion.

The most profound benefit of the cohort for RSU 18 has been that it allows access to the collective wisdom of many dedicated and insightful educators. Most notably, teachers have been gathered from MCCL districts in the various content areas and have drawn up a curriculum that eschews age-based grade levels in favor of proficiency-based achievement levels. They wrote documents that describe exactly what proficiency looks like in any particular standard and the sequence that will lead through mastering a

standard. The cohort, in this capacity, has been invaluable. As Gary Smith said, “When this is done, the curriculum will have been reviewed by 12 districts. That’s powerful.”

Supporting other districts as they move toward customized learning is an explicit part of the mission of the MCCL. Linda Laughlin – as well as curriculum leaders from other cohort districts – has taken on a leadership role in this capacity, conducting MCCL orientation sessions for districts that express interest. Since the success of implementation is so heavily reliant on collaboration, the creation of a larger pool of supportive districts is in the interest of MCCL members. “You need to increase capacity across the state,” said Laughlin. Other areas of heavy lifting (or heavy thinking) that the cohort intends to address include policy issues, such as report cards, graduation requirements, post-secondary transitions, etc.

Professional Development

The teachers of RSU 18 have historically been receptive to professional development opportunities promoting reform. Even after failure of the Local Assessment System movement, which the faculty had embraced, and other contentious initiatives, staff members were open to intense measures of professional development. As explained above, beginning in 2009, every staff member in the district attended *Understanding the Model* training. After this, teachers were offered *Classroom Design and Delivery*, *Instructional Design and Delivery* (IDD, or Beacon II) and *Guide Training*. If they showed interest, the district took pains to arrange trainings. “Educators value knowledge,” said China Primary/Middle School Principal Carl Gartley, “and as a district, we’ve committed to providing that. Any training that they’ve wanted, they’ve gotten.”

RSU 18 brought in other professional development support for customized learning. Bea McGarvey has worked with the district in a number of capacities since March of 2010. Initially, she worked with the MCCL developing curriculum. Later, RSU 18 brought her in specifically to do training on formative assessment and standards-based grading. She’s also been brought in as a coach for classrooms and teams running pilots. Finally, she conducted an all-district workshop on the opening day of the 2011-12 school year. In the midst of all this, the state adopted the Common Core State Standards for English Language Arts and math, which folded in nicely with the curriculum work being done by the cohort, but which required its own measure of attention. Finally, the district worked to implement a grading software – *Educate* – which supports true standards-based reporting, requiring its own set of trainings.

The amount of professional development required has challenged the district in a number of ways. “You can’t just do it on workshop days. You have to release [teachers] from classes,” says Laughlin, though this is difficult with a limited pool of substitute teachers to access. It has been standard practice to train during the school day, but that means asking teachers to write sub plans – and be absent from their rooms – for two to four days at a time. In addition to the logistical issues, there are the real costs. Some of this has been ameliorated via cost sharing with the MCCL, but the district has directed

the bulk of its professional development budget towards this effort, including some stimulus funds.

The sheer scope of professional development required, and the simple realities of trying to run a school district, has resulted in a transitional state in which different staff members are at different levels of training. It's difficult for the administration to see how this could have been avoided. It may simply be a condition of the transition. There are teachers who have been trained and highly engaged since 2009, teaming up and piloting very ambitious classrooms. At the same time, there are teachers who only went through Beacon training in spring of 2012. If the ultimate goal of the implementation is systemic change, one question is how do you bring along "the late-comers" so that they can thrive within this new system? The district has reaffirmed its commitment to addressing the capacity of all faculty members. Between December 2011 and May 2012, over 40 days of professional development were scheduled in the district.

The pressure to move forward is great. Teachers, parents and students who have embraced and thrived in this system are eager for the district to commit. Messalonskee Middle School Principal Mark Hatch felt this pressure from the James Bean School's fifth grade students (and their parents), who have been immersed in the system for two years. Are those fifth graders going to enter into a sixth grade in which they no longer have "voice and choice" or transparent standards with clear measures of how to demonstrate proficiency? If the district decides that these learners will continue in a customized-learning environment, how will the district make that happen, with everyone trained to different levels?

Building Capacity: Pilot Programs

Shortly after the RISC trainings started, many teachers began small-scale pilots. Often these involved implementing what are known as classroom tools. These are techniques used to shape the culture of the classroom to focus the task at hand. Included in these tools are the "Parking Lot" – a feedback device for kids to communicate concerns to teachers – and the "Standard Operating Procedures" and "Code of Conduct," which are drawn up with the kids for each classroom and revisited and edited regularly. This level of implementation has been almost universal in the elementary schools, though more sporadic in the middle schools and high school.

Systematic and in-depth pilots have been done throughout the district, concentrated in the elementary levels. These pilots have provided a variety of "laboratories" in which ideas have been tried and worked out, or tried and discarded. One tenet of the customized learning model is that mistakes are inherent in the learning process. There have been some celebrated pilots in the district, but all of the pilots have provided essential information about customized learning. This is especially true of those pilots that have proved more challenging.

For example, teachers Brynn Charest (grade two), Tammy Pullen (grade one) and Pam Corson (kindergarten) have been running a pilot at the Atwood Primary School in

Oakland. In this pilot, learners move freely between rooms for literacy. One early challenge occurred when one classroom used workstations organized according to one particular model (Debbie Diller's), while the other used another model (Café). The kids had difficulty moving from one system to the other and back. The teachers stopped the pilot and now plan for all three of them to be using Café next year. This underscored the value of pilots, where practice brings up issues not considered in a purely theoretical context. The pilot brought it out: simple procedures that change from room to room can be a barrier to kids' learning.

Bobbi Farrell had a similar realization with the eighth grade ELA pilot at Messalonskee Middle School, which was focused on conventions of English. Three eighth grade teachers participated. One took on capitalization, another punctuation, and the third sentence structure, with units relying on web-based sources for its materials. A problem emerged around grading procedures: only a learner's assigned teacher has the "permissions" in their grading software to enter grades for that learner. With all three teachers sharing all eighth grade kids, each teacher would have to collect grades – on paper – from the other two, or they would have to share passwords to enter data into the grading software. In the end, they passed paper grades around, but the administration and tech teams are looking to devise a more elegant solution for next year. Theoretically, they knew in RSU 18 that grading software and management of student data would be a tricky and vital issue, but the pilot brought out some specific, urgent needs.

One problem that surfaced during all of the pilots was what Principal Mark Hatch characterized as the "system-in-a-system" problem. For example, if a teacher is trying to run a proficiency-based classroom, reporting when a learner demonstrates proficiency, and allowing as much movement as possible, difficulty can arise at report card time, when they have to give a letter grade based on an average. In some cases, teachers sent home a standards-based report card in addition to the regular report card, but this often caused confusion. Also, after operating a customized-learning classroom, teachers began to question the practice of averaging grades in and of itself. If mistakes, they argue, are a necessary part of learning, then averaging grades penalizes a learner for making mistakes while working toward proficiency. Once proficiency was achieved, why would the mistakes they made along the way matter at all?

Another facet of the system-in-a-system dilemma has been that different classrooms have different procedures. In the middle schools, for example, students traveling from a pilot classroom to a non-pilot classroom have to alter the way they do school for that particular hour. For a special education student who travels frequently between rooms, according to Special Education Director Cheryl Mercier, this shift in expectations can be unnerving. It can also be challenging for the special education support person who has work in as many as 20 different classrooms over the course of a week.

Pilots are undeniably valuable to the effort to build ownership and capacity for this change, but they are also very hard work and very emotional. A number of teachers and their principals report that they have been working harder than they have ever worked in their careers. Yet, they also report that they are more fulfilled and more enthusiastic

about education than they can remember. To support them, the district brought in Bea McGarvey as a coach for pilot teams, and she has provided extraordinary support. “I’ve had teachers who were considering retirement tell me they’re going to stay in for a few more years, just to follow this through,” said Gary Smith.

Considerations

In conducting this study, a number of areas worthy of consideration surfaced. These include policy, technology, collaboration, the high school and the pace of change. Each of these will be dealt with in the following pages.

• Policy

Absent so far in this phase of the implementation process has been discussion of policy, such as graduation requirements, reporting systems, hiring, evaluation, etc. According to Gary Smith, this is intentional. “We’re just starting to get there,” he said, “We know that’s something we have to do over the next several years. Thus far, it has not been a problem. But this is the one area we have not done enough work. We need to review our policies and edit them to structure our work.” It is, he notes, a primary element of the shift out of phase one and into phase two. Linda Laughlin reports that she asked John Davis – superintendent of RSU 57, who has had extensive experience implementing proficiency-based change – what he would have done differently. His response was that he would put off the most controversial policy changes (report cards, specifically) to the end of the process so that the system might have more time to securely develop.

Throughout the state, the relationship between special education and proficiency-based instruction has given rise to some uncertainty. Many participants at RSU 18 used the analogy that customized learning is equivalent to an IEP for every student, and that, therefore, special education and proficiency-based learning are very compatible. This may be true, philosophically, but federal laws surrounding special education are copious, labyrinthine, generally non-negotiable and often run counter to ideas around customized learning. Special Education Director Cheryl Mercier, who is tasked with overseeing district compliance with those laws, described some areas of conflict that will need to be navigated. “For example, one of the questions we ask in referrals is, ‘Do they need specially designed instruction outside of the classroom?’ If that instruction is happening in the regular ed classroom because of customization, is the kid still getting special ed services? What if every kid is getting specially designed instruction? What if a class is broken into small groups, and the special ed tech is working with a group that has non-special ed kids?”

Gary Smith indicated that one reason the district is holding off on policy work is that, in the 2012-13 school year, the MCCL will begin focusing on policy as a group, alleviating the need for each district to tackle these issues alone. Smith was also

aware that other bodies, such as the New England Secondary Schools Consortium, were working on policy and said that RSU 18 would benefit from that work.

• **Technology**

Chuck Schwahn and Bea McGarvey, in *Inevitable*, made the case that the reason the transformation to customized learning is possible now is because technology, for the first time, makes it possible. Without the current levels of technology that Maine schools enjoy, customized learning would simply be a vision without action. Without exception, every participant agreed that the technological capacity of the district is key to the success of this venture. They offered two reasons. First, technology allows for multiple pathways for students to learn and demonstrate achievement of a standard. Second, technology allows teachers, administrators, students and parents to track and plan a learner’s individual learning plan in a way that has not been possible with paper records.

The MCCL is explicit in its position that customized learning and online learning are not the same thing – customized learning is not a matter of “just sitting the student in front of a computer with internet access” – but they are equally explicit that online resources are a necessary option for customized learning, in order to meet the varied needs of learners and to allow for “anytime, anywhere learning.” In addition to unprecedented access to information via Google, Wikipedia, YouTube, etc., the Internet offers learners many options for content delivery and assessment. Khan Academy, IXL Math, and Reading A to Z are just a few of the more well-known examples. Technological resources also allow students to gain rote knowledge on their own, while teachers work one-on-one with struggling learners. Some concern has been expressed in the elementary levels at RSU 18 because elementary schools typically don’t have the resources that the middle and high school teachers do through the Maine Learning Technology Initiative.

Many participants expressed the opinion that, without some kind of comprehensive, fluid, standards-based grading technology, the customized learning would “crumble under the weight of its own paper.” For recording and tracking student achievement of standards, RSU 18 has planned to adopt the *Educate* software in the 2012-13 school year. The formative nature of the system makes it especially important that student achievement of standards be reported in real time. In customized learning, students plan their time according to their ongoing efforts. If teachers wait even a few days to “enter grades,” students will be unable to quickly respond to feedback or take advantage of their best efforts.

• **Collaboration**

One of the most significant cultural shifts embedded in customized learning is the level of collaboration required by a customized-learning approach. Of the pilots examined for this study, only one was implemented by a single teacher; the rest were

implemented by teams, either vertically (across grade levels) or horizontally (within a grade level). One core feature of customized learning, the idea that kids should be free to move among achievement levels as they demonstrate proficiency, means that teachers have to be willing to open their classroom doors and share “their kids.” Resistance to this may stem from a desire to maintain autonomy within the classroom, or fear of losing the emotional strength of the relationships between teachers and students, especially in the primary grades. As they should, many teachers feel a strong sense of responsibility toward “their” set of kids.

Collaboration – sharing kids – is non-negotiable in the customized-learning model. After the initial RISC trainings, Shelly Moody said, “I was doing units in my class, trying to individualize, having kids monitor standards, and look at things through a standards lens, and last spring [2011], it felt like I had gone as far as I could go as an individual trying to implement this sort of work, so that’s when Valerie [Glueck] and I started collaborating. This work needs collaboration.” In the end, this collaboration, which had been a source of anxiety, became a source of satisfaction. “With this large caseload, we feel like we’ve been able to have an impact on so many more kids than we’ve ever had before. That’s a positive, but for some people that may feel overwhelming.”

Administrators report a rise in tension over the idea of vertical teaming – i.e., collaborations between teachers of different grade levels. At Atwood Primary, a vertical teaming pilot had to be set aside because scheduling issues. At Messalonskee Middle School, the eighth grade pilot was initially going to be a vertical pilot, but the complications coordinating between eighth and seventh grade schedules made it undoable. In the end, eighth grade teachers proceeded with their horizontally teamed pilot with the support of their building administrator. This may be a “system-in-a-system” problem, though, with vertical teaming being a transition from “the old way” in which teachers share “their” kids, to the more holistic, fluid model in which all kids “belong” to all teachers.

• High School

Pilots have been fewer in number at the high school. Concern about the high school reflects a similar concern felt throughout the state. Even at the James H. Bean School in Sidney, an elementary school, teachers have fielded questions from fifth grade parents about college acceptance and Carnegie units. As Messalonskee High School Principal Jon Moody said, “High school will always be the place where we say a kid graduates or not. It’s more fraught.” Mary Jane McCalmon echoed this sentiment, “You will encounter anxiety about the high school everywhere. I sympathize tremendously with those teachers at the end of the chain, because you get what you get...and you’re supposed to get them to proficiency? That’s enormous pressure.” This pressure will lessen, she says, as kids come up to the high school having been through eight years of a customized-learning system. For this reason, the administration at RSU 18 has been building capacity at elementary and middle levels, increasing the capacity of students and their parents before they enter the high

school. The district’s plan is to begin implementing in the high school, in earnest, over the next two years.

When making a change of this magnitude at a high school, some concerns arise perennially, such as report cards, college acceptance, etc. This has not yet happened on a large scale at RSU 18, though the administration expects it to. The question about whether or not this model will impact a student’s chance of getting into college has been raised, but it has not become a cause of huge concern. That may be because the larger community conversation – beyond the supportive visioning groups – has been reserved for later. School Board member Kerry Oliver said, “I’m not worried about kids getting into college. There are pretty smart people that are in admissions, and I don’t think they will be troubled by this. The way a kid is packaged for college will change over time. That’s not a concern, but I’m concerned that other parents will see it as a concern.”

• **The Pace of Change**

On the one hand, said some of the participants, the district is “plowing ahead,” moving far too fast. On the other hand, some participants said the district is moving far too slowly. Occasionally, a single person held both opinions, and held those opinions very strongly. Any systems change at this level will engender moments of great anxiety. In spring of 2012, that anxiety at RSU 18 revolved not around the idea of customized learning, but around the pace of the implementation. *How fast should implementation occur?* Linda Laughlin said, “We’re trying to be very responsible. We’ve been accused of moving too slowly. But there are teachers who are telling us we’re moving too fast.” Gary Smith has come to understand that different sites in the district have different requirements, “Just as we are trying to develop a customized education plan for each student, we will develop a customized implementation plan for each building.”

One administrator pointed to the district’s five-year plan, but asked, “Whose five years?” If a teacher is just getting *Beacon* training this month, “Do they get five years? Or did the five years start in 2009, with the first teachers to be trained?” This administrator attributed some of the divergence of perspectives to the fact that the district looks different at different levels. “If you are at the top level, you know that there are many people trained and ready to move on. But as you get closer to my level, you realize there are people who are not ready. How do you bring them along? How does it happen?” Many people have lagged in training for different reasons. Some had family commitments. Some were wary about leaving their classroom. Some had other training obligations (especially special education teachers). The dilemma is that you can’t wait until everyone has been trained, according to another administrator, “but you need to make sure staff who are implementing this know how to do it well.”

Just as some participants have called for the district to slow down – or to “stop, check and adjust” – others have expressed impatience. One pilot teacher has been

chomping at the bit: “Implement the foundational things! Accountability. Grading. Vertical teaming. Eliminate scheduling mandates, so kids can go where they need. Do it, already. Either you’re going to do it or not. Don’t waste three or four years beating around the bush.” After this heated moment, though, the teacher acknowledged that administrators “have a larger picture. But from my classroom, I would just do it. Boom. I know [administrators] have more concerns. I know the reality. I just don’t like the reality.” Other participants, watching kids succeed in customized-learning pilots, are eager for the model to spread. Principal of China Primary/Middle School Carl Gartley said, “When you walk into a classroom and see it starting to happen, you get impatient. I walk into a room and see how well it can work, and then walk into another room that’s not quite there...you get impatient.”

This feeling of being torn between “Can we just do it?” and “Can we please slow down?” is perfectly captured by the aphorism, quoted by school board member Kerri Oliver, “You have to go slow to go fast.”

Entering Phase Two

In January 2012, Superintendent Gary Smith put forth a proposed draft timeline for what the district has decided to call *phase two* (“implementation and organizational alignment”) of the process. (*Phase one* was “establish strategic direction,” *Phase three* is “continuous improvement and refinement”). They’ve abandoned the designation of “pilot” because that word implies that the transformation might not happen. That decision has been made. Gary Smith and the administrative team have drawn two timelines (figures 1 and 2 – pages 15 and 16) mapping out the process for the next few years.

Smith was careful to note that a change of this magnitude with such huge consequences for learners needs to be handled carefully. These timelines and plans are the *beginning* of the phase two conversation, which will involve administration, parents, teachers, students and the community.

Figure 1: RSU 18 Customized Learning Implementation Concept

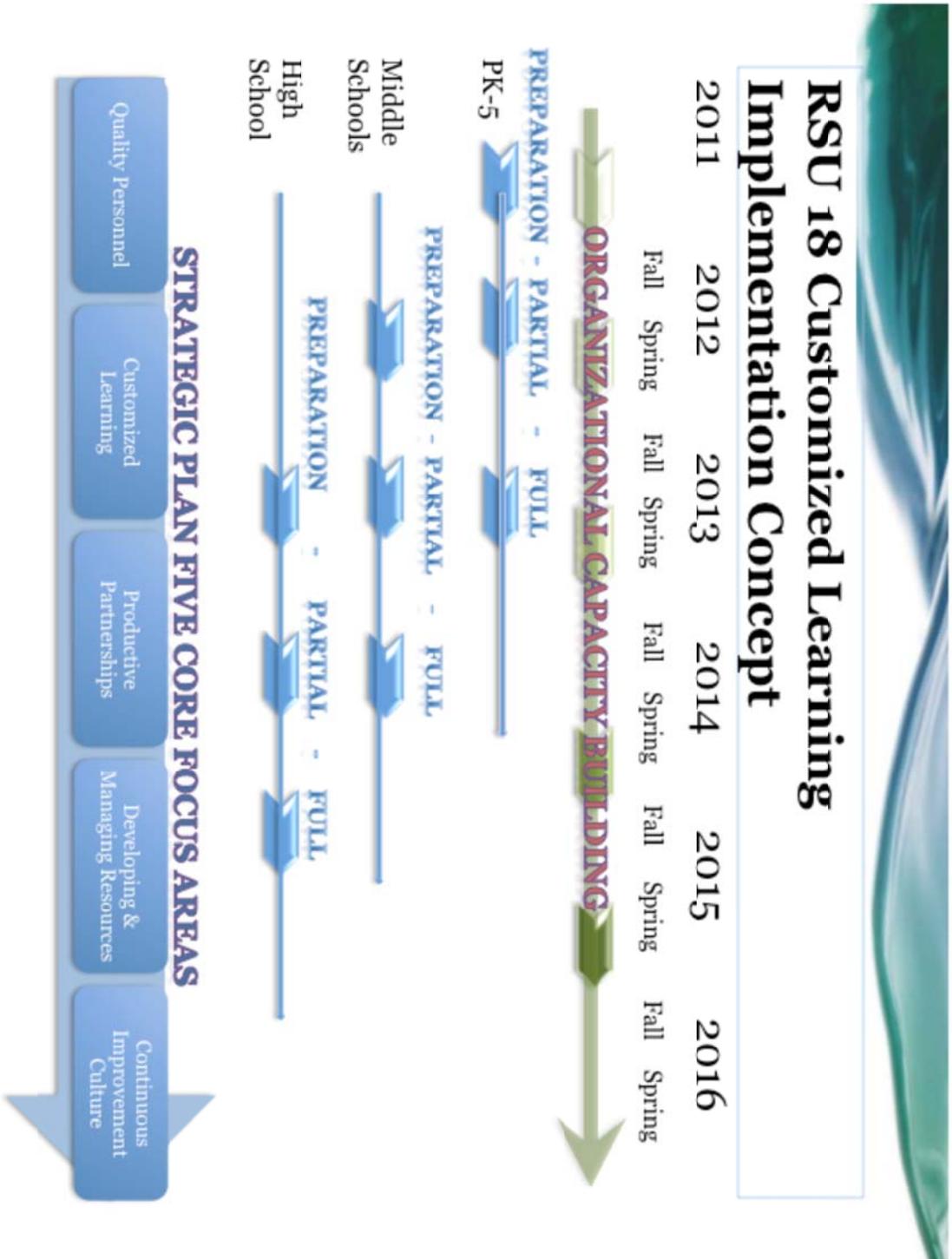


Figure 2: RSU 18 Strategic Direction

