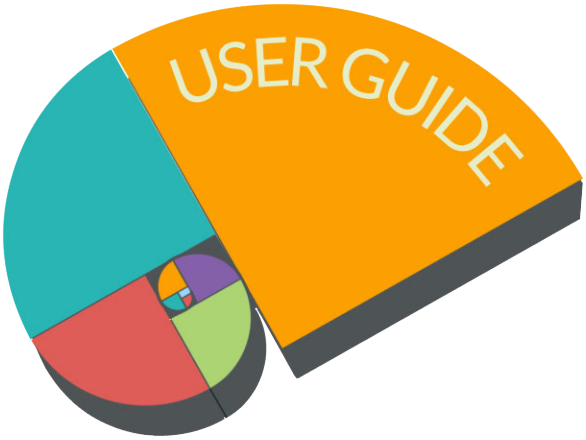
DEEPER Learning

The Planning Guide

by Monica R. Martinez with Dennis McGrath



About This Guide

The Planning Guide is based on the book, *Deeper Learning: How Eight Public Schools are Transforming Education in the 21st Century.* Deeper Learning, as described by the William and Flora Hewlett Foundation, is the means for teaching students to use their knowledge and skills in a way that prepares them for real life by mastering core academic content, such as language arts, history, math, and science. The students also learn how to think critically, collaborate, communicate effectively, direct their own learning, and believe in themselves. The book is intended to inspire parents, educators, and external stakeholders about what is possible and to provide examples of key strategies and common practices used by eight different schools to ensure students develop Deeper Learning (DL) outcomes.

The Planning Guide offers practical guidance on the conditions that have to be established for schools to truly change their practices to ensure students leave school with the sophisticated content knowledge and skills needed to be critical thinkers, problem-solvers, collaborators and communicators. It is our hope that the Guide, with its series of exercises and set of resources that demonstrate how schools can create the conditions that are necessary for Deeper Learning, will help you develop a strategic plan to transform your school.

The Framework

The Guide offers a framework for planning that addresses the reality that school transformation is an incredibly challenging task that will not work as a top-down mandate and requires time, collective effort, and a shared focus on vision and goals. The Guide is a resource and tool that can be used by district staff and professional development providers in addition to school-level leaders.

The Guide was specifically designed for schools that are interested in transforming for Deeper Learning and are looking for a way to get started. The Guide includes multiple exercises that take schools through a methodical planning process. This includes four phases:

1. Establishing a vision that reflects the values of Deeper Learning.
2. Assessing the degree to which each component of the theory of action currently exists within your own school based on your understanding of the conditions that must be in place to transform for Deeper Learning.
3. Planning for DL by identifying key strategies you can implement based on the theory of action.

HOW and BY WHOM Should the Guide be Used?

The Guide is organized so that users can understand the entire theory of action behind transforming a school for Deeper Learning and the depth of commitment, planning, and implementing that will be required. The Guide is also organized so that a team can use it as a multi-day exercise, such as a two or three-day workshop, or a team can work through each phase of the planning process throughout multiple two-hour working sessions over a two- to six-month timespan.

For schools that are just beginning the journey of school transformation for Deeper Learning, the Guide should be used in its entirety and, if possible, facilitated by somebody who is skilled at supporting group processes, such as a district representative, school coach, professional development or technical assistance provider. If your school has a history of low academic performance, it is imperative that you use a facilitator to guide you through the planning processes within the Guide as well as support you in the implementation of your plan. It is vital that you begin the planning process at least two to three months, or even earlier, before you want to implement your plan. Timing depends on the scope of activities you need to implement and the resources and capacity you have in place to implement your plan. Completing the self-assessment in Phase Two will help you understand the depth and breadth of what your plan will consist of to transform for Deeper Learning and then help you establish a timeline for the planning and implementation process.

The Guide is also designed to be used by schools that have a continuous improvement attitude. This includes schools that have been focused on developing their students as deeper learners for a period of time but want to re-assess the prevalence and depth of their structures, strategies and practices in producing Deeper Learning outcomes. Because the Planning Guide is designed so that each phase and exercise can be used independently, a school can enter at any specific phase, e.g., visioning, assessing, planning, or monitoring. For instance, you and the School Leadership Team, if not the entire staff, may want engage in Phase 1 to determine if your values for teaching and learning are reflected in your vision of your school or you may simply want to enter at Phase 2 where you conduct the self-assessment exercise after reviewing the core components of the theory of action for Deeper Learning. An understanding of the theory of action as well as the self-assessment results may inspire you to move to Phase 3 where you review and re-prioritize your current strategies. We still recommend that, if possible, a third party, such as a district representative, coach, professional development or technical assistance provider, who is skilled at supporting group processes, facilitate your continuous improvement process.

Form a Deeper Learning Design Team

While the Guide provides you with a methodological planning process, it is best to consider the Guide as an iterative inquiry-based process where you assess, design, implement, and then measure, reflect, and adjust your plan on an ongoing basis. For this reason, we recommend that you form a Deeper Learning Design Team to plan, support and monitor your school's transformation process.

There may already be several key leadership teams or committees at your school, such as a School Leadership Team or a "School Improvement Team" either as mandated by Title I or to focus on student achievement, that you may want to repurpose into your new "DL Design Team." However, you may want to establish a whole new team for the sole purpose of helping your school plan for DL. Only you can decide what is most advantageous and what will provide a strong start to the planning process.

You will be relying on this team to play a number of roles across all four phases:

- Establish and communicate the vision for DL.
- Conduct and complete the self-assessment on the four conditions for DL.
- Identify key strategies to ensure the four conditions are adequately addressed.
- Set benchmarks to use to monitor progress toward implementing the strategies.

There are a few key principles to consider when building your design team:

BROAD REPRESENTATION

Ideally, your design team includes a representative cross-section of your staff members from different departments, grades, and experience at the school. Veteran educators offer a perspective different from that of newer staff members, while cross-departmental membership ensures good thinking about the most effective strategies to employ across all departments. Representation from all departments is critical because the DL relies on coherence across subject areas.

CAPACITY

Consider who has the capacity to do this work. Transformation is hard work, and your school needs individuals on the design team who are excellent problem-solvers, relationship managers, and expert coaches. It is also important to select people who have strong relationships across the school, as they can be helpful in gaining buy-in and communicating effectively to all the stake-holders. Having a data-savvy person may also be useful.

COMMITMENT

It may seem obvious, but your design team should be filled with individuals who are interested in and committed to implementing the vision for Deeper Learning.

The key is to identify a core cadre of individuals who can shape the change, be committed to transforming your school for Deeper Learning, and connect non-instructional decisions to student learning.

Deeper Learning Design Team Composition

The table below reflects how one school has organized their DL Design Team. Review this and, as a group, discuss whether you have a team in place at your school that can play the role of the DL Design Team, and is representative of the principles listed previously, or if you need to reconstitute a current team or create a new team to help plan for DL. It is crucial to be thoughtful and deliberate about this team's composition, purpose, role, and responsibility.

DL DESIGN TEAM COMPOSITION | EXAMPLE

	BROAD REPRESENTATION	CAPACITY			COMMITMENT
Names of Individuals Who Currently Make Up the Team or Whom You Want to Consider for the Team	Consider the Role, Number of Years at the School, Subject, Grades, Specialty, etc.	Has Problem Solving Skills	Has Strong Relationships in School	Has Data Expertise or Other Skills	Commitment to Deeper Learning
	9th Grade English teacher. The only teacher in the school with less than 3 years' experience.	He is always helping to solve problems for his grade-level team.	Everybody likes Daren because he helps them with their technology	Social media/tech	Always works to expand students' skills beyond content knowledge
	A founding teacher at the school; teaches 9th-12th grade science classes	Active in school-wide and grade-level committees	Knows everyone and is well respected	Is always developing new projects	Always pushes students to reflect on the why of what they are learning
	Spanish teacher for 5 years	Develops creative ways to teach foreign language	Works to integrate Spanish with Humanities and Social Studies	Coordinates Community Service	Works holistically on student reading, writing and speaking skills
	Counselor at school for 7 years	Works effectively with students and families	Works with teachers across all grades	Encourages a holistic view of student	Works hard to prepare students for college and career
	Math teacher for 8 years	Involved in national math education organizations	Chairs the Academic Standards Committee	Leads teachers in interpreting student test scores	Dedicated to the academic success of students
	Social studies teacher for 5 years	Active in developing collaborative projects	A leader on her grade-level team	Good tech and social media skills	Always pushing students to develop critical reading and writing skills
	History teacher for 10 years	Helped revise history standards	Founded a teacher reading group	Uses debates to teach historical perspectives	Works with students on writing and speaking

Name Your Deeper Learning Design Team

YOUR DL DESIGN TEAM

Names of Individuals Who Currently Make Up the Team or Whom You Want to Consider for the Team	BROAD REPRESENTATION	CAPACITY			COMMITMENT
	Consider the Role, Number of Years at the School, Subject, Grades, Specialty, etc.	Has Problem Solving Skills	Has Strong Relationships in School	Has Data Expertise or Other Skills	Commitment to Deeper Learning

THE FOUNDATION OF THE GUIDE:

The Guide is based on a theory of action that reflects the conditions the schools from the book, ***Deeper Learning: How Eight Innovative Public Schools are Transforming Education in the 21st Century***, have established to ensure all students master content knowledge, are critical thinkers and problem solvers, productive collaborators, effective communicators, and learn how to learn and develop an academic mindset. We grouped these conditions into four core components of a theory of action for Deeper Learning. All four components are essential and must be established sequentially for your school to transform for Deeper Learning. The theory of action is as follows:

> ***If*** a culture in which educators and students trust and respect one another and feel responsible for each other's success as learners is established; ***and*** teachers function as professionals in a collaborative community, ***then*** teachers can design or adapt learning experiences that are meaningful to students ***which*** will lead students to regularly engage in acquiring and applying knowledge and skills through the deliberate practice of Deeper Learning outcomes. This will ***result in*** students leaving school with the knowledge of how, why, and when to apply content knowledge and a set of non-cognitive skills to answer questions and solve problems related to the challenges of college, career, and life (knowledge transfer[1]).

HOW THE GUIDE IS ORGANIZED:

You can search the Guide online ***(www.DLplanningguide.com)*** by whatever phase you want to explore or exercise you want to use. You can also print the Guide in its entirety or by selected phases and exercises.

Phase 1 is designed to help you determine if the vision for teaching and learning at your school is aligned to Deeper Learning. It provides exercises to help you develop a cogent vision statement that reflects Deeper Learning and identifies processes you can use to communicate this vision to develop a shared understanding of the values and direction of your school among your stakeholders.

Phase 2 is designed to help you assess the degree to which each component of the theory of action currently exists within your own school. You will be able to review a definition of each component of the theory of action as well as specific examples of a range of practices that illustrate how the principles within the definition have been applied in various schools before using the self-assessment tool to determine the degree to which each condition currently exists within your own school.

Phase 3 is designed to help you begin planning for transformation. It includes a process and a set of tools for you to identify and prioritize strategies and develop Strategic Action Plans that will comprise your plan.

Phase 4 provides you with a process and tools to help you monitor the implementation of the Strategic Action Plans you created during Phase 3.

[1] *James W. Pellegrino & Margaret L. Hilton. 2012. Education for Life and Work: Developing Transferable Knowledge and Skills in the 21st Century. Washington, DC: National Research Council. and embedded in the web version: National Research Council: http://www.nap.edu/catalog.php?record_id=13398*

THE RESEARCH BEHIND THE GUIDE:

A recent study by the American Institutes for Research (AIR) [2] substantiates the effectiveness of DL practices on student performance. The study surveyed 1762 students drawn from 22 schools in New York and California serving low-income students and students of color that were associated with Deeper Learning Networks. These networks serve a diverse and traditionally underserved group of students. The study compared them to similar students in non-Deeper Learning schools. The results demonstrate that attending DL schools benefited students regardless of their background or whether they lived in an urban or suburban district. The findings include:

- Students — regardless of their prior level of academic achievement — attained higher standardized test scores on both state assessments and an OECD PISA-based test. These assessments measure core content knowledge and complex problem solving skills.
- Students are more likely to graduate from high school on time than students in comparison schools.
- Graduates are more likely to enroll in four-year colleges and enroll in more selective institutions.
- DL Students benefit from greater opportunities for project-based learning, internships, and longer-term cumulative assessments.
- DL Students report higher levels of collaboration skills, academic engagement, and motivation to learn compared to their non-DL peers.

These results support the proposition that DL enables teachers and principals to help students master content knowledge, become critical thinkers, productive collaborators and effective communicators who have an academic mindset and are self-directed. Furthermore, a study by the National Research Council, *Education for Life and Work: Developing Transferable Knowledge and Skills in the 21st Century,* identified instructional principles that enable students to transfer knowledge, including content knowledge in a subject area and procedural knowledge of how, why, and when to apply this knowledge to answer questions and solve problems in the subject area:

- Begin with clearly-defined learning goals and a model of how learning is expected to develop.
- Use assessments to measure and support progress toward goals.
- Provide multiple, varied representations of concepts and tasks.
- Encourage questioning and discussion.
- Engage learners in challenging tasks, with support and guidance.
- Teach with carefully selected sets of examples and cases.
- Encourage student motivation.
- Use formative assessment to provide feedback.

[2] *Kristina Zeiser, James Taylor, Jordan Rickles, and Michael S. Garet, Michael Segeritz. 2014. Findings from the Study of Deeper Learning: Opportunities and Outcomes. Washington, DC: American Institutes for Research. www.air.org/project/study-deeper-learning-opportunities-and-outcomes.*

Our own book, ***Deeper Learning: How Eight Innovative Public Schools are Transforming Education in the 21st Century*** (www.thenewpress.com/books/deeper-learning), is based on a qualitative study of eight public secondary schools that showed that the schools share a common set of practices designed to promote Deeper Learning outcomes. The schools all:

- Empower and encourage students to become more self-directed, creative, and cooperative by inculcating cultural norms and using inquiry based instruction.
- Develop students' capacity to identify key ideas, relationships, issues and skills within context beyond memorizing content.
- Make curricula more engaging, memorable, and meaningful by explicitly connecting learning to real-world issues and concerns.
- Extend learning beyond the classroom by forming strong partnerships with businesses, community organizations, research institutions, and colleges and universities.
- Inspire students to do their best by identifying their talents and interests and customizing learning to discover the motivational "hook" for each young person.
- Incorporate technology to enhance the school's approach to learning and expand the resources available to students.

About the Schools

The eight public schools in our book, ***Deeper Learning: How Eight Innovative Public Schools are Transforming Education in the 21st Century*** (New York: New Press, 2014) include:

Avalon School is a charter school located in St. Paul, Minnesota. Avalon opened in 2001 and serves 185 students in grades six-12. Total minority enrollment is 30 percent of the student body and 30 percent are on free or reduced price lunches. Thirty-two percent of the students are classified as Special Education and 5 percent are classified as English Language Learners. The school operates on a teacher-owner governance model, has no principal or director and uses the Envisions model.

Casco Bay High School in Portland, Maine, serves 335 students in grades nine-12. Total minority enrollment is 31 percent of the student body. Fifteen percent of the students are classified as Special Education, 21 percent are classified as English Language Learners, and 45 percent of the students are eligible for free or reduced price lunches. Casco Bay High School is one of four public high schools within Portland and operates within the Portland Public School District. Founded in 2005, CBHS is a school of choice and uses the Expeditionary Learning Model.

Impact Academy of Arts & Technology is a college preparatory charter school founded in 2007 and operated by Envision Schools. Impact Academy operates within the Hayward Unified School District, in the San Francisco-Oakland area. The school serves 460 students in grades nine-12. Total minority enrollment is 82 percent of the student body and 66 percent of the student population is eligible for free or reduced price lunches. Eight percent of the students are classified as Special Education and 17 percent are classified as English Language Learners.

High Tech High is a college preparatory charter high school in San Diego, California that serves 562 students in grades nine-12. Total minority enrollment is 66 percent of the student body and 37 percent of the students are eligible for free or reduced price lunches. Ten percent of the students are classified as Special Education and 4 percent as English Language Learners.

King Middle School in Portland, Maine serves 537 students in grades six-eight. Total minority enrollment is 39 percent of the student body and 54 percent of the students are eligible for free or reduced price lunches. Students at King speak 28 different languages and come from 32 countries. Fifteen percent of the students are classified as Special Education and 30 percent are classified as English Language Learners. King Middle School is one of three public middle schools within Portland and operates within the Portland Public School District. In 1988 King Middle School adopted the Expeditionary Learning Model.

MC² STEM High School in Cleveland, Ohio was founded in 2008 as a public-private partnership that is a subset of Cleveland Metropolitan School District's New and Innovative Schools Program. Two-hundred and eighty-nine students in grades nine-12 attend classes at campuses embedded in business and school sites around the city. The ninth grade is located at the Great Lakes Science Center; the 10th grade is located at General Electric Lighting's Nela Park Campus while upper grades are located at Cleveland State University. Total minority enrollment is 88 percent and 100 percent of the students receive free or reduced-price lunches. Slightly more than 12 percent are designated as Special Education and 1 percent are English Language Learners. School is in session year-round, with students working for ten weeks, taking a three-week break and then repeating that pattern for four ten-week terms throughout the year.

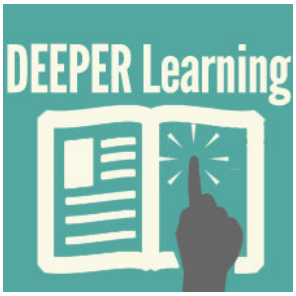
Rochester High School serves 565 students in grades nine-12. It is the only public high school in rural Rochester, Indiana, and operates within the Rochester Community Corporation School District. Ninety-two percent of the students are Caucasian, 44 percent are eligible for free or reduced price lunches and 15.2 percent of the students are classified as Special Education. In 2007, Rochester High School adopted the New Tech Network Model.

Science Leadership Academy (SLA) is a magnet STEM high school located in downtown Philadelphia, Pennsylvania, that opened in September 2006. SLA is a partnership between the School District of Philadelphia and The Franklin Institute. The school enrolls 484 students in grades nine-12. Total minority enrollment is 68 percent of the student body and 49 percent of the students receive free or reduced price lunches. Eight percent of the students are classified as Special Education and 1 percent are classified as English Language Learners.

ACKNOWLEDGEMENTS:

We want to thank the many people who contributed to the development and refinement of this Planning Guide. An early version of the Guide drew upon elements of "deliverology," a strategic planning process created by Sir Michael Barber and supported by the Education Delivery Institute. A later version was significantly revised after a teacher team at Avalon School – Carrie Bakken, Gretchen Sage-Martinson, Nora Whalen, Kevin Ward – field tested the Guide during a three-day workshop and after Diana Laufenberg, Lead Teacher and Managing Director for Inquiry Schools, piloted the Guide in planning sessions with two schools. Based on these experiences, the Guide was improved to include less narrative, more exercises and specific tools, such as rubrics, and examples of Deeper Learning in practice. Following this revision, a number of people from the policy, research and technical assistance sectors reviewed the Guide and provided additional feedback. These individuals included Ace Parsi from the National State Boards of Education; Loretta Goodwin from the American Youth Policy Forum; Rebecca Wolfe from Jobs for the Future; Elizabeth Foster from The National Commision on Teaching and America's Future; Helen Soule from the Partnership for 21st Century Skills; Colet Barlow from the Montana State Department of Education; Aaron Maurer, Iowa Teacher of the Year Finalist and Instructional Coach, Bettendorf Schools in Bettendorf, Iowa; Greg Butler from Collaborative Impact; and JoEllen Lynch from Springpoint. We are grateful to each of them for their many thoughtful suggestions. We also thank Marc Chun of the William and Flora Hewlett Foundation for his careful reading of the Guide and helpful recommendations in addition to funding the Guide so it may be free and available to all.

About the Authors



Monica R Martinez, PhD, is an education strategist and consultant, author, presenter, and appointee to the White House Commission on Educational Excellence for Hispanics. Dr. Martinez is former President of the New Tech Network and the Vice President for Education Strategy at KnowledgeWorks. She was a senior associate at the Institute for Educational Leadership where she founded the Washington, D.C. based National High School Alliance. She currently serves on the Board of Trustees of 10,000 Degrees and previous to this, AdvancED and Grantmakers for Education. Dr. Martinez is the coauthor of ***Deeper Learning: How Eight Innovative Public Schools Are Transforming Education in the Twenty-First Century***. She is available to lead workshops on the *DL Planning Guide*. She lives in the San Francisco Bay area. (www.monicarmartinez.com)

Dennis McGrath, PhD, is a Professor of Sociology at the Community College of Philadelphia, where he won the Christian R. and Mary F. Lindback Distinguished Teaching Award. He is the coauthor of ***Deeper Learning: How Eight Innovative Public Schools Are Transforming Education in the Twenty-First Century*** and the author of *The Collaborative Advantage: Lessons from K-16 Educational Reform*, among other works. He lives in the Philadelphia area.