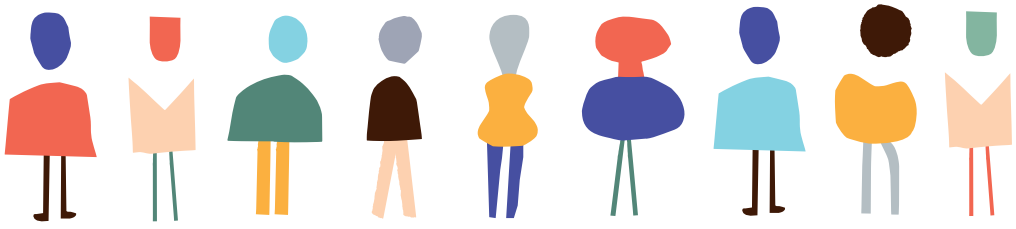
SUMMIT PUBLIC SCHOOLS

BUILDING SUMMIT BASECAMP:

Year 1



CASE STUDY REPORT • 03.2017

About This Paper

This case study was written to share what's been learned in the first year of Summit Basecamp, an ambitious effort to support public schools across the country in implementing personalized learning. While recognizing that Summit Basecamp is one approach to personalized learning, we believe the lessons from the 2015-16 school year, and illustrations of how Summit Basecamp applies in different contexts, can inform the work of others in the field.

Note that Summit Basecamp is now called the Summit Learning Program, and Summit Learning represents the organization's personalized approach to teaching and learning.

This case study is also the fourth case study that FSG has written with Summit Public Schools. Previous case studies, which together trace the evolution of Summit's approach to personalized learning, include:

* Blended Learning in Practice (2012): An in-depth case study of Summit's early work in blended learning.
* It's Not Just About the Model (2013): How rapid-cycle improvement has accelerated Summit's learning and growth.
* Self-Directed Learning At Summit Public Schools (2014): How students, teachers, parents, and administrators each experience Summit's whole-school model.

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All statements and conclusions, unless specifically attributed to another source, are those of the authors and do not necessarily reflect those of the other organizations or references noted in this report.

Acknowledgements

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Meeting the Mission

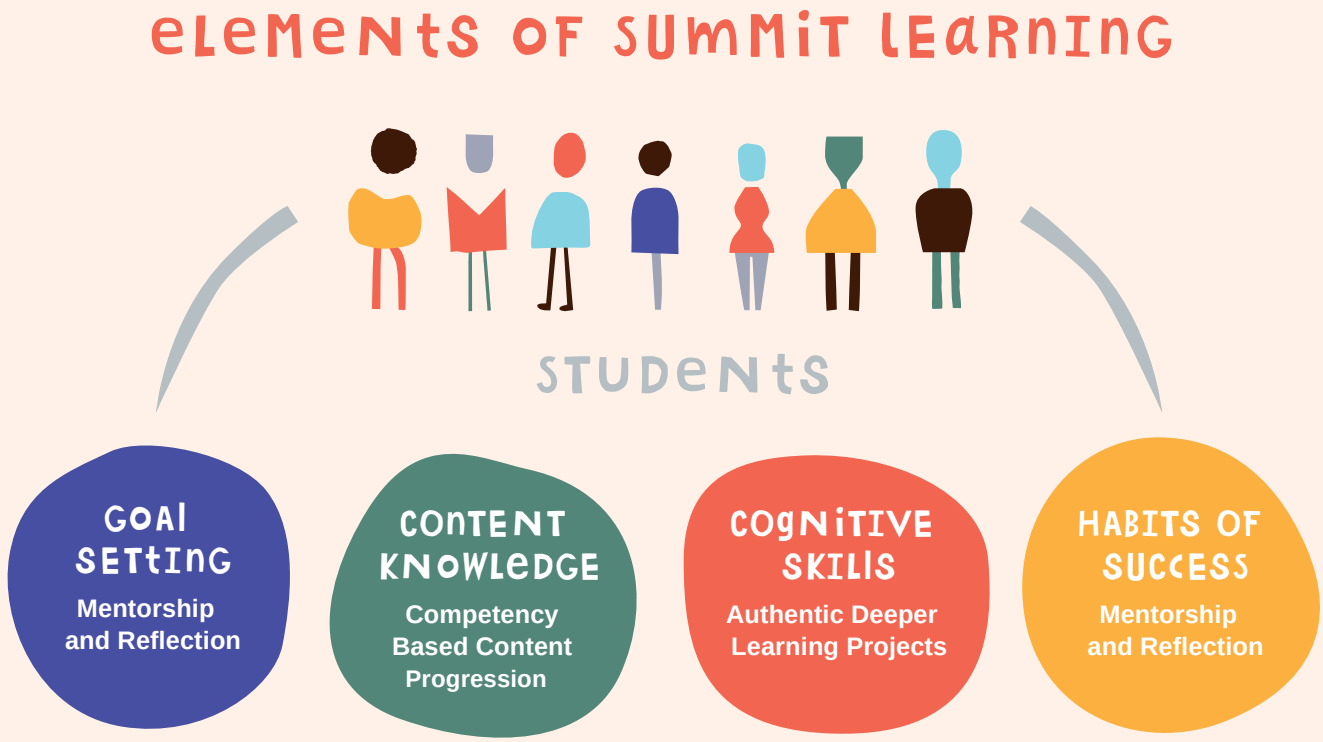
Summit Public Schools has a single mission, with two parts. The core of the mission, and Summit's focus since its founding in 2003, *is to prepare a diverse student population for success in a four-year college or university, and to be thoughtful, contributing members of society.* Thirteen years later, each element of that mission is visible in the self-directed, personalized learning model that has earned Summit considerable national interest and acclaim. But in recent years the second aspect of Summit's mission – *to leverage its work to have broader impact on public education in America* – has become equally important.

This second part is more than a broad gesture toward scale. Like many charter public schools, Summit has long *wanted* to influence the broader education system. Yet after years of hosting visitors, conducting workshops, training other teachers, and describing best practices, Summit still wrestled with how to share its model in a deep enough way to support other educators to transform their own schools. In 2014, however, Summit found its answer – a program called Summit Basecamp, combining Summit's education know-how with the skills of engineers from Facebook, which aims to help dozens, hundreds, and potentially thousands of other district and charter public schools implement personalized learning successfully.

This case study tells the story of how Summit Basecamp, in a little over a year, grew to become an initiative unlike any in education today. But understanding Summit Basecamp's rapid evolution starts with recognizing how the same pattern of seeking challenges, testing hypotheses, and continual reflection has sped Summit's own growth and development. It's a culture and process of improvement that's just as central to Summit's success as anything visible inside its schools.

This identity was on display in 2010 when Summit, upon examining the college completion data of its high school graduates, realized that many struggled with the rigor of college math and the skill of navigating college independently. To address this, Summit first supported a handful of teachers on one of its campuses to pilot Khan Academy in their 9th grade math classrooms. At the time, few schools were using so-called blended learning, but Summit's hypothesis was borne out. Math scores rose, and as teachers tested and adapted Khan Academy over 2011-12 they noticed an uptick in students' engagement with their work. Summit pulled on this thread, expanding the math pilot to other grades in 2012-13 to test if these skills of self-direction could translate across subjects.

Again they saw progress, and the next year Summit launched a network-wide, whole-school model that mixed self-directed online learning, cross-disciplinary projects, real-world experiences, goal-setting, and one-on-one mentorship from teachers. Underpinning each of these elements was the Summit Learning Platform: an online, internally-developed tool that students used to complete work, set and meet goals, and monitor their progress throughout the year. This is the model that continues to be used (and continues to evolve) in Summit schools today.



In retrospect, these steps in Summit's evolution can be seen as a series of hypotheses, grounded in experience and informed by data, for how personalized learning can transform a school experience. *Khan Academy can help raise math scores. Self-Directed learning will prepare students to succeed in college and beyond. A technology platform can make a personalized school model possible in a public setting for all kids.*

In turn, the first year of Summit Basecamp rests on its own set of hypotheses. Because the program is so new, the best way to understand Summit Basecamp is to understand these hypotheses baked into it from the start. Summit believes that if these hypotheses hold true, then it actually will be possible to grow personalized learning to a much larger number of students, and actually change the public education experience for children in America.

- Personalized learning takes a balance of **structure and flexibility** to scale
- Summit Learning can **translate** to different contexts and schools
- The Summit Learning Program creates the resources and conditions for schools to **continually improve**
- A public school network and a technology company can form a true **partnership**

But before examining these hypotheses in depth, it's important to recognize where they came from, and how Summit Basecamp was born from an unlikely visit to one of Summit's schools.

Creating Summit Basecamp

In January 2014, Summit CEO Diane Tavenner hosted a notable visitor. Dr. Priscilla Chan, wife of Facebook Founder and CEO Mark Zuckerberg, had heard of Summit's evolving school model, and, intrigued, asked if she could see it. She came away impressed, and soon after Zuckerberg visited as well. As Tavenner showed him around the school, Zuckerberg was amazed at the different learning experiences for each student, and how engaged students seemed in their work. He soon realized that Summit's Learning Platform (then called the PLP), was creating a technology backbone that made the whole approach possible.

Zuckerberg soon asked to meet Summit's engineering team. Tavenner introduced him to Sam Strasser, who had joined the previous year and turned Summit's constellation of Excel data files and ed-tech programs into a prototype of the Summit Platform. When Zuckerberg met Strasser he couldn't help but glance around for the rest of the team. Tavenner explained that Strasser *was* the team. Again, Zuckerberg was impressed, and wanted to understand how the Summit Platform had been built, the approach behind it, and what it might achieve. As the visit ended, Zuckerberg told Tavenner that Summit was what he hoped all schools could look like, and asked how he might help.

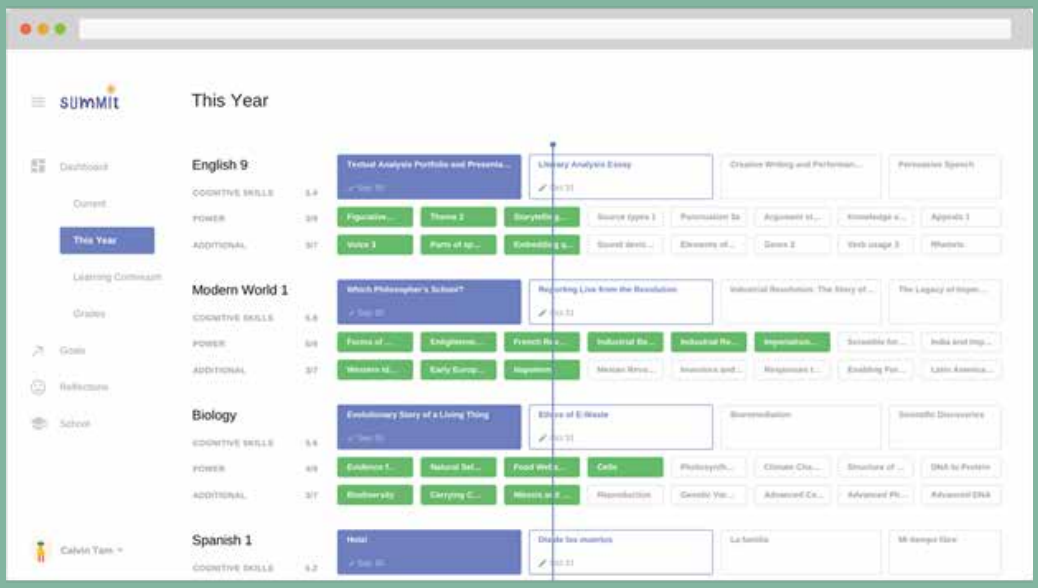
Shortly thereafter, the two continued their conversation about Summit's evolution, its online platform, and the challenges Summit faced in sharing its work effectively with other schools. Zuckerberg stressed that *sharing* is what technology – and particularly Facebook – does well, and that if Summit truly wanted to share its work at large, they'd need some engineers to take the Summit Learning Platform to the next level. Zuckerberg offered to provide a team of Facebook engineers, at no cost, to build out the Platform. Tavenner accepted, and Facebook quickly formed a team of five (including Strasser) that would be led by Engineering Director Mike Sego. Most importantly, whatever the team created would be publically available for free.

Over the ensuing months, the Facebook engineering team observed classes, got to know Summit's teachers, and brainstormed where they could take the Summit Platform together. The first and obvious task was expanding a new version of the tool across all seven schools in Summit's network. Over the 2014-2015 school year, the team would focus on making the Platform as useful as possible to Summit, and then would turn to growth.

In parallel to the engineering work, Summit assembled a team of educators to match the technology platform with the right set of experiences needed to spark personalized learning in other schools. They knew from the outset that they couldn't and didn't want to just copy the Summit model, and expect it to flourish in very different contexts. At the same time, Summit had a strong perspective, informed by experience, on what it took to make personalized learning work. After much discussion, the group distilled the desired experience into three required elements: students would access online content and take on-demand assessments through a *competency-based progression*; schools would use *project-based learning* and a cognitive skills grading rubric to help instill self-direction, and *teachers would act as mentors* to guide student goal setting and progress. They decided to name the program Summit Basecamp.

With these three pillars of Summit Basecamp in place, plus several requirements around technology and logistics for participating schools, the Summit team had to decide *who* within a school should lead personalized learning implementation, and *how* Summit would sup-

How is the Summit Platform used?



Students

Students use the Summit Platform to work through content and take assessments at their own pace, participate in projects, and set goals and track their own progress throughout the year.

Educators

Educators use the Summit Platform to track student progress, inform mentor conversations, create and adapt curricular content, and pursue their own professional development.

Parents

Parents use the Summit Platform to understand how their children are doing at any point in time throughout the year, as well as their progression toward college readiness.

Technical requirements for participating schools, 2016–2017

- **1:1 laptops**
- **Sufficient bandwidth**
- **Google Apps for Education and Google Chrome browser**
- **Clever to sync student information**
- **Obtain parental consent for students to use the Summit Platform**
- **Meet student data privacy requirements**
- **Sign partnership agreement with Summit**

port them. Again, they drew from their own experience, in the early days with Khan Academy, when it was a team of 9th grade teachers that piloted and eventually advocated for the technology tools that would change Summit's model. Starting with a single grade would allow personalized learning to be teacher-led and would keep it manageable in scope, but Summit wanted students and teachers to feel immersed in personalized learning, and be able to work on interdisciplinary projects. The solution, that would unlock many aspects of Summit Basecamp's design, was for schools to commit to personalized learning in math, science, social studies, and English, and apply as a grade level team – in Summit's view, a small but powerful group with a path to changing the whole-school experience.

Based largely on Summit's reputation and outreach, 150 schools expressed interest in Summit Basecamp. Sixty-five completed applications, and Summit selected 19 to participate in its pilot year. In choosing participants, Summit looked primarily for a learning mindset, a belief in personalized learning, and a commitment to adopt the structures embedded in Summit Basecamp. Just as importantly, they wanted a cohort that reflected the diversity of public education – district schools and charter, rural and urban, with different demographics, across the United States. This range of schools, they believed, would force them to grapple with challenges that Summit had never encountered, and come up with solutions that would help personalized learning serve more students in future years. As for support, Summit would provide – free of charge – a two-week summer training to spark each team's growth in personalized learning; a dedicated Summit mentor to deliver intensive coaching throughout the year; and support from Summit and Facebook to improve the Summit Platform and troubleshoot any problems along the way.

* * *

Of the 19 schools selected, Summit assumed that 10 would stick with such an intensive program through the school year, with others choosing to pause or take a more gradual approach. Yet one year later, in summer 2016, all 19 schools completed their first year of implementation of personalized learning. Each also continued using the Summit Platform in some capacity their second year. Furthermore, over 100 new schools joined the program and launched the Summit Learning Program (formally known as Summit Basecamp) in Year 2 – many of them recruited by their peers from the Year 1 cohort.

Looking back on 2015-16, the hypotheses woven through Summit Basecamp's design remain the best way to understand the experience of 19 separate schools. These hypotheses, some clearly stated and others implicit in the program, are what needed to be true for personalized learning to actually take root in such a range of different contexts. And while these hypotheses have largely been borne out, in each instance there have been moments of struggle along with success, and learnings about what it takes to scale personalized learning that can inform both Summit's growth and the broader field.

FOUR HYPOTHESES FROM YEAR 1

1. Personalized learning takes a balance of structure and flexibility to scale
2. Summit Learning can translate to different contexts and schools
3. The Summit Learning Program creates the resources and conditions for schools to continually improve
4. A public school network and a technology company can form a true partnership

HYPOTHESIS 1

Personalized learning takes a balance of structure and flexibility to scale

Perhaps the biggest bet of the Summit Learning Program is that it creates enough structure to spark quality personalized learning, but not so much that it stifles innovation. For Summit, personalized learning arose from a multi-year process of reviewing research, piloting ideas, seeing progress, making mistakes, and moving forward amidst a still-emerging field. Yet in planning to reach a much larger number of schools, Summit returned repeatedly to the question of how they could shorten this learning cycle for those schools new to personalized learning, while retaining what was needed to succeed.

The three main requirements of the Summit Learning Program – competency-based progression, project-based learning, and mentoring – are Summit's answer to this question. But for Summit, these are more than programmatic pillars; they embody core underlying principles for what quality personalized learning should look like across settings. If participating schools could fully adopt these three pillars, Summit believed, they would connect intrinsically to the principles of good personalized learning. The result would be a constellation of schools adapting personalized learning to fit their own contexts, but remaining connected by simple structures and common values for what education should achieve.

This balance of structure and flexibility is most evident in Summit's work to embed its vision for personalized learning into the Summit Platform. At a basic level, the tool is designed around the pillars and principles of Summit Learning – students use the Platform to complete content and assessments at their own pace; the Platform shows students where they are on-track with their projects and helps manage group work; and students use the Platform to set goals and track progress, which informs the weekly mentor check-ins. Yet as the year has evolved, Summit noticed that while schools were adopting the structures of Summit's approach to learning, some were not accessing the deeper principles underneath.

With mentoring, for instance, after observing classrooms and listening to feedback from the 19 schools, Summit realized that schools were doing mentor check-ins, but some teachers were struggling with understanding their students' progress well enough to help them set effective goals. In particular, the Summit Platform was doing a good job of showing a student's point of progression over the year, but it was hard to see just the past few weeks (i.e., Were students trying work and failing? Not trying? Making last-minute progress?). At Summit's own schools, teachers had other ways to develop contextual knowledge of their students, but it was obvious that more structure in the Platform was needed. With this in mind, the engineering team built and piloted a new feature that could show teachers in one click how students had progressed over the past several weeks. Immediately, teachers sent in feedback tickets raving about the new function, and eventually student goal-setting improved.

Curriculum development likewise reflected a balance of structure and flexibility. By the beginning of the 2015-16 year, Summit had uploaded its entire grades

Underlying Principles of Summit Learning

1. Connects childrens' long-term goals and aspirations to daily decisions, actions, and behavior.
2. Engages children in deeper learning where college-ready content is applied to real, authentic situations.
3. Empowers children to be self-directed learners, armed with the habits and skills for academic and personal success.
4. Nurtures diverse communities of learners, where children practice and model life skills, and receive feedback to individually grow and thrive.

3 Pillars of the Summit Learning Program

Competency based progression with on-demand assessment, using the Summit Platform

Project-based learning and grading with cognitive skills rubric

Teacher student mentorship, goal setting

6—12 curriculum to the Summit Platform. This included 200+ projects, over 700 content assessments, their cognitive skills rubric, and more. Summit hoped that schools would see this “Base Curriculum” as a free, quality resource and simply run with it, but this was not a requirement.

Over the course of the year most schools did use the Base Curriculum to some degree, but around a quarter of schools ended up building and uploading their own into the Summit Platform. This was more than Summit expected; as a result the team built additional features into the Platform to make it easier to upload native curricula or adapt what was already in the platform. Furthermore, one of the major evolutions in the future of the Summit Learning Program will be expanding the Base Curriculum to become a tightly curated, Wikipedia-like hub that schools contribute to and draw from. Summit hopes this will increase the range and quality of curricula available across the Summit Learning network, while reducing the time schools spend on adaptation.

HYPOTHESIS 2

Summit Learning can translate to different contexts and schools

Some of Summit's greatest strengths stem from its identity as a public charter school network founded in Silicon Valley. Yet Summit Learning tests whether the lessons from Summit's approach can be adapted to very different contexts. The 19 schools in Year 1, for example, include 15 district and 4 charter public schools, in 11 different states, serving different student populations, in both urban and rural areas.

In part, the answer to whether Summit Learning can translate to other contexts is that all 19 schools finished Year 1 and will work with the Summit Platform in Year 2. Along the way each school has made adaptations to fit their local context. Yet looking more deeply, a range of learnings – both successes and challenges – emerge from the experiences of individual schools and districts. To better understand what this has looked like in practice, the following pages contain short profiles of how three diverse members of the Year 1 cohort have experienced the Program. These schools and districts include:

- **Pasadena Independent School District** in Texas
- **Truesdell Education Campus,** in District of Columbia Public Schools, Washington D.C.
- **Urban Promise Academy,** in Oakland Unified School District, California

In addition to examining these individual experiences, the following, cross-cutting lessons stand out from Summit's first year of helping personalized learning transfer to 19 different contexts through its Program.

* **Find champions.** Each of the 19 schools included at least one individual who made special efforts to advocate for the Program, convince other colleagues to adopt it, and navigate obstacles. Finding these champions early – and supporting them with resources, time, and connections – is essential for bringing along the broader school and system. In addition to school-level champions, the large districts that saw the most success with the Program each benefited from a district point person who could bridge the school and central office levels, connect school teams with resources, and provide the air cover needed to implement successfully.

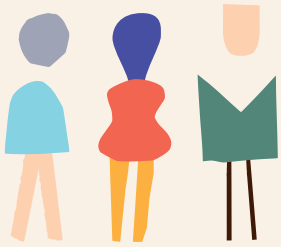
* **Alignment from classroom, to school, to district.** Particularly in larger systems, the ideal team will have champions at three levels: at the teacher level to own changes to instruction, at the school leader level to connect personalized learning to the school's larger vision, and at the district leader level to provide resources and support. Of these, the teacher and principal levels are most important, but absent district buy-in, Summit Basecamp (like any innovation) risks becoming an island in a large system. Looking across Cohort 1, the greater degree of vertical alignment that districts developed from the superintendent down to teachers, the greater support the Program received both inside a school and for eventually spreading within the district.

* **Different strategies for different sites.** The Program looks slightly different in each of the 19 sites. Helping each site adapt the Program to its needs, while maintaining the core pillars of Summit Learning, has required a differentiated set of supports along with significant effort and flexibility on the part of Summit. In a charter school setting, for instance, implementation might contend with defined procedures and cultural norms. Allowing students

2015 Summit Basecamp Partner Schools

Summit Basecamp's inaugural partner schools reflect the diversity of our nation's communities.

2,300 Students



120 Teachers

19 Public Schools

to own their own learning, and accepting the messiness that comes with this transition, can be difficult for some charter schools – particularly those that follow a "no excuses" model. District schools, on the other hand, actually displayed more initial openness, but needed significant assistance when core tenets of personalized learning (for instance, competency based progression) collided with existing rules and structures.

* **Summit mentors matter.** One aspect of the program that held true across contexts was the value of the Summit mentor assigned to every Summit partner school. Mentors spent roughly one week a month visiting each assigned school, and conducted regular phone calls with each team. The fact that each mentor had previously worked as a Summit teacher established their credibility, and over time most mentors came to function as a coach for school principals and teacher leaders on how to continually improve implementation and each school's model.

Sparking a District Movement

PASADENA ISD

300 STUDENTS FROM 3 SCHOOLS PARTICIPATED IN BASECAMP 2015-16

DISTRICT DEMOGRAPHICS

82% HISPANIC	7% WHITE	1% OTHER	7% AFRICAN AMERICAN	3% ASIAN	55,395 STUDENTS	67 SCHOOLS	77% FREE OR REDUCED LUNCH

Three years ago, in 2013, a small group of teachers and district leaders from Pasadena ISD in Texas visited Summit Public Schools. At first glance, a large district serving over 55,000 students outside of Houston seems far removed from a charter network in Silicon Valley. But for several years, Pasadena had been exploring how technology might transform learning in its 67 schools. From purchasing devices to creating city wifi towers to building alignment among district and school leaders, all of the elements for Pasadena were in place. But in visiting Summit, Pasadena finally found a school model and approach to learning that made them work together.

Pasadena was inspired by Summit's vision for personalized learning, coupled with practical tools to integrate the different pieces of a technology-infused model. Following their visit, the Pasadena team worked hard, over more than two years, to share the Summit approach with teachers, principals, and administrators. Some were skeptical about the technology, but eventually over 60 district educators visited Summit, and after seeing what learning looked like in Summit's classrooms, decided to lend their support. When Summit Basecamp opened applications, Pasadena was one of the first districts to apply. Yet to make it their own, they named the effort Pasadena Connect.

Navigating Implementation

In 2015, three grade level teams from three schools attended Summit's Summer Training. They tested out the Summit Platform, planned for mentor time, and compared Summit's Base Curriculum with Pasadena's. In the end they used ~85% of Summit's curriculum in core classes, but in some areas – for instance, in Texas History – had to create their own. Over the rest of the summer the teams of teachers prepared the classrooms, communicated with parents, and rehearsed for Day 1.

When the 300 students across three schools started Pasadena Connect that fall, some soared in the new, self-directed environment. Yet other students, accustomed to being told what to do in school, struggled with autonomy. Teachers, too, faced adjustments. For some teachers, making the shift from content delivery to coaching was hard to make; others swung too far and gradually added structure back in as they calibrated their new roles. Yet soon teachers started to observe an increase in student engagement with their work. Internal metrics such as content assessment completion rate started to improve, and gradually Pasadena's model began to gel. At each step of the way, the Summit mentor assigned to coach Pasadena – who would spend over a week a month on site – was an essential support and thought partner for the district and school leaders navigating changes to their model.

Adapting the Model

Pasadena was enthusiastic about Summit's approach to personalized learning, but knew they would have to adapt implementation to their own context. Several examples of Pasadena's evolution included:

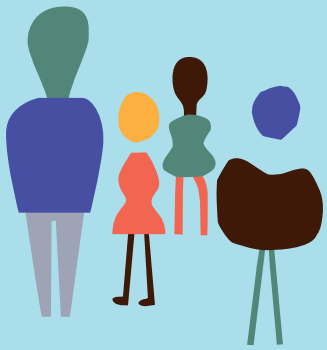
* **For mentor time,** even after several months some students still struggled with goal-setting. Instead of weekly mentor check-ins, one school in Pasadena started daily, brief mentor check-ins with the highest-need students. Students also started breaking their weekly goals in the Summit Platform into more bite-size "steps." Goal setting and completion improved.
* **To improve content assessment pass rates,** a group of math teachers started monitoring pass data much more closely. They eventually worked with Summit and Facebook to build a new feature in the Summit Platform to better understand *why* some students didn't pass.
* **Pasadena also had to adapt its own structures.** At the district level, for instance, Connect schools were granted an exemption from interim **benchmark assessments** designed to be given at the same time for a district-wide scope and sequence – a conflict with the competency-based progression model of Summit Basecamp.

Spreading the Word

By the end of the school year, there was a buzz in Pasadena ISD. More and more teachers, principals, and parents were coming to observe what was happening in the Connect schools. The Connect teachers saw improvements in academic data, but most rewarding was observing students articulate their own strengths and weaknesses as learners, and what they needed to learn next.

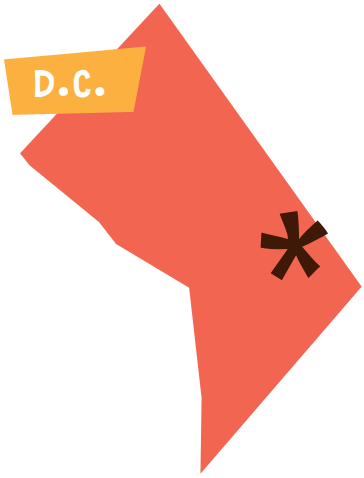
Each of the three schools piloting Connect will expand to a new grade level next year. Additionally, seven other schools applied and were accepted to the Summit Learning Program for 2016-17. To prepare, over 100 Pasadena educators traveled together to the Summer Training in 2016. Over time, Pasadena plans to scale quickly but thoughtfully, using district feeder patterns to expand Connect so that within five years every student in grades 5-12 will have the option to opt-in to the program. Beyond the district, Pasadena is beginning to host workshops and train other districts who are interested in personalized learning. Rather than sending these teachers to Summit, Pasadena hopes to become a hub for expanding personalized learning, and adapting it further, all across Texas.

LESSONS FROM PASADENA



- **VERTICAL ALIGNMENT** from district leaders, school leaders, and teachers
- **FOCUS ON CULTURE CHANGE** before launch
- **PERSEVERING** through initial challenges
- **ADAPTING THE MODEL** to suit local needs

Teachers Lead the Way



DISTRICT OF COLUMBIA PUBLIC SCHOOLS TRUESDELL EDUCATION CAMPUS (DCPS), PK3—8 PUBLIC SCHOOL

526 STUDENTS IN 7TH AND 8TH GRADE PARTICIPATED IN BASECAMP 2015-16

DISTRICT DEMOGRAPHICS

65%	31%	2%	1%
HISPANIC	AFRICAN AMERICAN	ASIAN	WHITE

In February 2014, a cohort of District of Columbia Public Schools teachers participating in an educator fellowship visited Summit Public Schools. For one 8th grade English teacher, Adam Zimmerman at Truesdell Education Campus, Summit's personalized learning model seemed like a possible answer to the challenges he and his colleagues had been facing. While Truesdell was a school on the rise, they served a significantly disadvantaged student population. Zimmerman and his middle school colleagues were a strong team, but they still struggled to truly reach each student in an individualized way, rather than shooting for the middle. This need was particularly acute for Truesdell's growing ELL population.

Zimmerman and the middle school team researched Summit's approach carefully. They brought the Summit Basecamp idea to Truesdell's principal – a veteran, respected leader in DCPS – and together the group conducted a SWOT analysis for pursuing the program. In early 2015 they applied and were accepted into the Program and a team of 10 travelled to California for the summer session.

Lining up Logistics and District Buy-In

DCPS is a large urban district with a history of innovation and a high degree of external scrutiny. The district is also flooded each year with requests from external groups to pilot or partner on new programs. While Summit's Program held the advantage of starting with organic teacher and school leader enthusiasm, they still had to build substantial District buy-in to launch in fall of 2015. On a strategic level, this meant presenting evidence to the District's teaching and learning leaders, based on Summit's experience, that Summit's personalized learning approach could raise academic achievement. Summit's free programmatic cost compared to competing initiatives was also attractive – the District could save on technology licensing costs with the free Summit Platform, and reinvest in teacher development or added hardware.

The Truesdell team, with significant support from the District's lead for personalized learning, won approval to move forward, but still faced a number of logistical and technological hurdles. These ranged from setting up Gmail accounts for Truesdell, to digital account licensing, to buying a domain. More significantly, additional computers had to be purchased to bring the school to 1:1, and Summit worked closely with DCPS to make sure the Platform's content passed the District's filter. Despite these challenges, the Truesdell team's energy, combined with District support and guidance from Summit, had Truesdell ready for Day 1 in the fall.

Integrating Summit Basecamp into Truesdell

Truesdell's teacher team and principal worked closely with their Summit mentor to integrate the structures of Summit's Program with Truesdell's own strengths. To

start the year, Truesdell adopted 80-90% of the Base Curriculum. But in ELA, for example, the school had a strong prior focus on writing through the Hochman Method, so built additional writing opportunities into projects.

A bigger shift was necessary to adapt Summit Learning for Truesdell's large ELL population. At the start of the year the Base Curriculum was only in English. Truesdell's teachers spent substantial time creating scaffolds for ELL learners, and often pulled small groups of ELL students to work with them directly. When necessary, teachers also translated key pieces of the Base Curriculum to Spanish. Summit soon recognized these challenges, and sent a team of educators and engineers to see how they could adapt its personalized approach for a bi- or multi-lingual classroom. They tested different features in the Summit Platform, and added additional functionality for ELL learners – for instance, allowing teachers to turn on different-language assessments for different students. Truesdell and the Summit team are continuing to work together on stronger ELL features in the 2016-17 year.

Worthwhile Results

Given the amount of work invested in the first months of the school year, the Truesdell team put off several previously-planned aspects of the model. Student mentoring, for instance, did not become a focus until halfway through the year, when Truesdell shifted their master schedule to better integrate mentoring into the day, and trained teachers to better use an inquiry-based approach to coach students on goal setting. Student goal setting quickly ticked upward, and teachers could see students take more and more responsibility for learning.

By the end of the year, these positive signs had translated into real improvement for Truesdell's students. When the middle school team looked at student behavior data, they realized there were only two suspensions in middle school in 2015-16 – the lowest in memory, and down from 11 the year before. Attendance was also up, and teachers felt strongly that an increase in student agency from personalized learning contributed to these gains. As for achievement, on the NWEA MAP assessment Truesdell scored in the 99th growth percentile on 7th and 8th grade ELA and 8th grade math, and in the 76th growth percentile on 7th grade math. This performance helped Truesdell post the highest 2015-16 math score gains in all of DCPS. Next year, Truesdell will expand Summit Learning down one level to 6th grade. The District also plans to expand Summit Basecamp to more schools, but is waiting another year until Summit completes a technical integration with Microsoft Office. In the meantime, a range of schools have begun to borrow pieces from Truesdell's approach as personalized learning takes deeper root in DCPS.

LESSONS FROM TRUESDELL

- **START EARLY** on logistics for a big district launch
- **TEACHERS** can drive adoption and innovation
- **BASECAMP CONTINUES TO EVOLVE** to serve ELL students

Engaging All Students at Urban Promise Academy

OAKLAND UNIFIED SCHOOL DISTRICT
URBAN PROMISE ACADEMY
6–8 PUBLIC MIDDLE SCHOOL
371 STUDENTS IN 6TH GRADE PARTICIPATED IN BASECAMP 2015-16

DISTRICT DEMOGRAPHICS

95% FREE / REDUCED LUNCH

31% ENGLISH LANGUAGE LEARNERS

In 2001, a coalition of parents and community groups founded Urban Promise Academy (UPA) to serve middle school students in the Fruitvale neighborhood of Oakland, California. Since its founding, Urban Promise has earned recognition for its full-service community school model, and for its success in educating a high-poverty, high-English language learner (ELL) student population. Yet by the mid 2010s several new challenges had emerged. After a small-schools grant expired, UPA saw a rise in class size, straining the ability of teachers to meet a wider range of student needs. At the same time, Oakland had seen an overall increase in "newcomer" students who had immigrated to the United States within the last year. At UPA, teachers found that the roughly 15 newcomers per grade, some from as close as Central America and others as far away as Yemen, were eager to learn yet spoke little-to-no English, and brought with them histories of significant trauma along with gaps in basic skills.

UPA's faculty began to wrestle with how to meet such varied needs, while holding true to the school's ethos of differentiated instruction and individual connections. In parallel, with support from a local foundation, several teachers had begun experimenting with a station rotation blended learning model. Teachers liked how students could progress at different speeds, but struggled with the time burden of managing multiple software programs and data feeds for multiple student groups. When Summit opened applications in 2015 for its Program, UPA teachers saw the potential for the Summit Platform to streamline the school's use of technology for learning while strengthening their ability to serve students at varied levels. The UPA sixth grade team decided to apply, and was accepted into Summit's first cohort.

Starting Too Fast

During the Summer Training, the sixth grade team worked together on a shared vision for personalized learning. They began constructing curriculum units, pulling roughly half from Summit's Base Curriculum and keeping half of their own, and they also designed an orientation program for the first few weeks of school. When the sixth graders arrived at UPA in the fall, they went through lessons on how to use the Platform, work individually, and set goals during personalized learning time.

Yet when teachers began the first content focus area, students reacted in very different ways. Some students, typically those already working at a high level, immediately took off. Others saw the on-demand assessments and tried to take them repeatedly, like a video game. Still others just felt lost and didn't know what to do in a self-directed environment. In response, UPA's teachers backtracked. They broke down each of the sub-skills be-

hind self-direction: how to take notes, how to set goals, how to work through a playlist and know when you're ready to take an assessment. This process was painstaking, but student progression improved, and teachers gradually released control as the year went on.

Modifying to UPA's Needs

Even as self-direction improved, UPA's highest-need students, particularly ELL newcomers, still encountered challenges. The Summit Base Curriculum, for instance, was designed for middle and high school, and simply didn't have enough content for students working at a second or third grade level. The lack of resources in different languages likewise proved a challenge. As a result, the UPA team (with support from Summit) worked to modify core courses. In math, for instance, some ELL and special education students would complete a more limited number of the Summit Platform focus areas, and spent part of their time in a different online program that could better target basic skills. Teachers also spent significant time modifying the level and vocabulary of both playlists and projects so that students could move forward. In addition to these modifications, UPA's teachers used data from the Summit Platform to identify which students were struggling, and they used short pull outs to work with individuals or small groups on specific gaps and challenges.

Moving Forward

Tailoring Summit Learning to UPA's student population took a tremendous time investment on the part of teachers. Yet teachers also found that the combination of real-time student data and ongoing modifications and accommodations allowed them to target specific student needs in a way they never could before. As the year progressed, teachers noticed a change in how students could articulate what they were working on, their goals, and what they needed to improve. On a quantitative level, the percent of sixth graders reading at or above grade level rose from 9% at the beginning of the year to 31% by the end of the year, while the percent of students reading multiple years below grade level decreased from 70% to 49%. In math, the sixth grade was also the highest performing grade at UPA on the Smarter Balanced Assessment. For 2016–2017, UPA teachers decided to expand Summit Learning across seventh and eighth grade, and they are continuing to work internally and with Summit to deepen the initiative's ability to support the needs of all learners.

LESSONS FROM UPA

- **OVER-PREPARE** for launching personalized learning
- **GRADUAL RELEASE** into self-directed learning
- **TAILOR TO LOCAL CONTEXT** and student population

HYPOTHESIS 3

The Summit Learning Program creates the resources and conditions for schools to continually improve

Summit knew from its own experience that innovation in personalized learning was less about a single school model or fixed endpoint than a process of continual evolution and improvement. Yet could such an orientation be taught, and at scale? Summit initially struggled with how change management or creating a learning organization, which felt so intertwined with Summit's culture and context, could be distilled into the program.

They landed on a coaching system to meet schools partway – sharing tools and tips from Summit's own experience, but also asking mentors to catalogue the different change management hurdles from a myriad of schools. Based on mentor input Summit could design resources accordingly, and hopefully support the deep process of school change while allowing it to be locally owned.

Looking back after Year 1, three necessary elements stand out for undertaking continuous improvement in Summit's partner schools:

* **Mindset.** The capacity for a school to improve starts with a willingness to improve. Fortunately for Summit, most schools applied to the Program with an openness to change and desire to get better. Yet despite this starting point, those teams might return home to very different contexts, some less positively disposed to personalized learning. In response, Summit spent substantial time helping participants connect their experience with the heart and purpose of why they became educators in the first place. For instance: helping students succeed, meeting the needs of every learner in a class, or mentoring young people to make positive life choices. Yet Summit also stressed the hardship of the profession, the often-neglected gap between the promise and reality of teaching, and how personalized learning can help educators reconnect to their aspirations and abilities as professionals.

* **Metrics.** It's not enough to simply want to improve – common data is important to guide improvement and show educators if progress is being made. For schools in the program, the Summit Platform provided a steady stream of data about student experiences and achievement. These data – on topics such as the number of content assessments passed or student goal setting – were available real-time to all teachers using the Summit Platform, and were also specific and addressable by grade level teams.

* **Process.** With the common metrics from the Summit Platform in place, the next step was to equip school teams with process tools for improvement. In this area Summit brought considerable experience. Summit had used the Lean Startup Build-Measure-Learn process for several years in order to improve large aspects of their school model over multiple months. For shorter, everyday tasks, Summit used Plan-Do-Study-Act cycles among teachers, and Wish-Outcome-Obstacle-Plan cycles with students. Summit drew from these and other processes as they codified and shared tools with its partner schools.

As schools worked through these different aspects of continuous improvement, Summit mentors acted as coaches and guides each step of the way. This help was indispensable. At the start of the year, mentors could educate grade level teams on the value of continuous improvement, and help establish the habits and struc-

tures to reflect on data. While the exact process varied by school and mentor, mentors would coach schools through four-to-six-week cycles of choosing specific metrics to move, implementing strategies, and checking back on progress. In turn, Summit mentors would convene back at Summit at regular intervals to roll up what was being tested and learned across the 19 sites, and share potential strategies for supporting other schools.

By the end of the school year mentors increasingly tried to work as coaches so schools could own their improvement processes themselves. Yet the real test for continuous improvement will come in subsequent years, when these 19 schools will receive much lighter mentor support. Next year the Summit Platform will also share a greater depth of resources around learning and improvement. Summit hopes that as more schools join and contribute to Summit Learning, their collective knowledge of improvement will make the process shorter for future teams. Still, this is a hypothesis to test in upcoming years – a topic that will be explored later in this case study.

HYPOTHESIS 4

A public school network and a technology company can form a true partnership

Underlying the other hypotheses of Summit's Program is the question of whether its two founding partners – Summit and Facebook – could work together effectively. As technology plays a larger role in education, a number of schools have joined with companies to develop products and programs. What separates the Summit-Facebook partnership is its depth, and the ability of two organizations, at first glance quite different from one another, to be inspired and learn from each other's expertise.

In 2014, when Mark Zuckerberg offered Diane Tavenner a team to build out the Summit Platform, they started with five engineers. Today the Facebook team has grown to over 20 – mostly engineers, but also experts in areas like product, design, content, partnerships, and user experience research. On the Summit side, educators, mentors, and program managers have often worked from Facebook's headquarters, sitting together with the engineers to collaborate and get to know one another's traits. The engineers, for instance, quickly learned that educators dislike meetings and are always stretched for time, while the educators were surprised the engineers liked to talk out different scenarios and ideas. Both sides found this counterintuitive. By the end of the year, the two teams were in sync.

But the main lessons have come from classrooms – the Facebook and Summit teams spend significant time observing schools, both Summit's partner schools and its own schools. Some of the most valuable time for engineers, for example, has been hanging out in a Summit teacher lounge, or shadowing a week's worth of mentor conversations. Sustained over more than a year, this mix of informal and formal interaction has led to a level of trust and candor that teachers rarely extend to non-edu-

cators. In turn the engineers have built a more nuanced understanding and increasing empathy for the needs of the Summit Platform's end users – helping ensure the tool is not designed for a younger version of a software engineer, but for teachers and students of varying cultural backgrounds, and different habits for using technology.

Summit has learned from Facebook as well. In working with Facebook to build the Summit Platform, Summit gained insight into a product development process that was deeper than anything it had encountered in education. While the Summit team had long prided themselves on designing around teachers and students, this pushed them to a new level of specificity and rigor. In addition to depth, Facebook works at a massive scale.

While education is a different ecosystem, Facebook's experience with rapid growth has helped Summit rethink its own assumptions about scale through technology – in balance with ensuring that demand for personalized learning comes from schools themselves. Yet beyond Facebook's reach, the ethos of personalized learning has resonated with the company's belief in designing its products around the needs of different, individual users. While the Summit Platform will always be separate from Facebook's core business, this shared philosophy has helped connect the teachers, engineers, and leaders of both organizations at a level that is deeper than a single product – helping solidify the Summit Platform as an important piece of both Summit and Facebook's work.

Laboratories of Innovation – the future of Summit Learning

In the summer of 2016, 1,100 educators, representing grade level teams across 100+ schools, walked through Summit's doors as its second cohort of partner schools – now renamed as Summit Learning and the Summit Learning Program. This annual jump from 19 to 100+ schools begins a new era for the Summit Learning Program that focuses on both quality and rapid scale.

Each of the hypotheses and lessons from Year 1 will continue to hold relevance as Summit Learning grows to meet national demand. But in Year 2 a whole new set of hypotheses – about what it will really take for Summit Learning to succeed with more schools serving more diverse students – are already underway.

These hypotheses for Year 2 and beyond include the following:

* **The Summit Platform can automate key structures.** As the Summit Learning Program grows, some of the intensive, in-person supports from mentors will need to be embedded into the Summit Platform. Given the value of mentors, this admittedly will be a challenge. In some areas Summit will decide that mentors remain indispensable. But for areas where multiple schools faced similar challenges in Year 1 – for instance, with goal setting or combining curricula – automation will hopefully prove successful.

* **Regional partners can support local cohorts.** To reach 100+ schools, Summit is building the capacity of regional partners to support local schools. Partners in 11 regions are beginning to offer trainings to nearby Summit Learning schools, and Summit is launching a certification program to formalize regional supports for future years. Summit recognizes that the capacity of the Summit Learning Program to successfully scale – in 2016-17 and beyond – will depend on the capacity and effectiveness of these partners and regional hubs.

* **Network effects can improve quality.** Summit's long-term bet, informed by Facebook's experience, is that if the right feedback loops are in place, growth can increase the quality of the Summit Platform and the Summit Learning experience. With curriculum, for example, the Summit Platform will eventually hold a library of projects, assessments, resources, and tools that all Summit Learning schools can contribute to. Summit will curate the Base Curriculum for quality, and help schools to modify and share what's relevant. Over time all of the Summit Learning schools, and Summit as well, will have access to better and more varied curricular resources matched to each individual school's needs.

For Summit, much of Year 1 was about sharing their knowledge with other schools. Year 2 will be about helping knowledge flow across the Summit Learning community so that all schools – including Summit – can continue to improve. This vision, in which improving both Summit's model and the broader system are one and the same, echoes the original conception of charter schools as small teams of teachers who would come together to learn, experiment, and spread their ideas. But instead of one, Summit Learning seeks to create many laboratories of innovation, across charter and district schools, connected by a common platform and set of principles, and each advancing quality personalized learning at scale.

GROWING SUMMIT LEARNING

2014—2015

Facebook and Summit refine the PLP and make it work for SPS

2015—2016

Basecamp launches to 19 schools, reaching 120 teachers and 2,300 students

2016—2017

Summit Learning grows to 100+ new schools, reaching over 20,000 students

2017—

Summit Learning works to meet demand from schools nationally

Summit Public Schools