Bellwether

Levers of Change

How State Policies Support District Innovation

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Executive Summary

The public K-12 education system in the United States is being asked to meet more needs of more kids than ever before, especially in the wake of the COVID-19 pandemic. However, policies and practices have not evolved quickly enough to meet those needs, and as a result, the system continues to fail far too many young people.

Innovation is essential to overcoming long-standing achievement gaps and creating an education system that is dynamic, flexible, and personalized to the needs of individual students. Yet there's little consensus about what to change or how to change it, and experts disagree about whether the system itself can change or whether we need to start over and build an entirely new system. Regardless of where one falls on that debate, however, innovation is happening within the existing K-12 education system. It may be less "shiny" than expected and happen more slowly than desired, but change is underway, and, in many places, states are leading the effort.

This report focuses on the role that states play in catalyzing and supporting innovation in public school districts. States can undertake various actions to spur innovation, such as adopting new laws, amending or repealing existing laws, changing policy or regulation, providing funding, or creating new programs. A variety of actors may be involved in the design and implementation of innovative policies and programs, including state legislatures, governors, state education commissioners, state boards of education, and state education agencies.

Through desk research and interviews with experts, we identified seven states that have taken a variety of approaches to fostering innovation in school districts: Colorado, Kentucky, Montana, New Hampshire, North Dakota, Utah, and Washington. In each state, we conducted additional desk research and talked with state and district leaders to learn more about the innovative policies and programs and how they are playing out on the ground. Through those conversations, eight policy themes emerged. **Three themes are related to the design of the policies**:

1. Pilot programs, waivers, and additional funding are the most common levers states use to catalyze district-level innovation.

While states have a variety of levers at their disposal to create the conditions necessary for school districts to innovate, these three are the most common across the seven states profiled in this report. Some states use just one lever while others combine them.

2. Most states' policies provide flexibility from common barriers to innovation, including seat time requirements, graduation requirements, and assessment and accountability structures.

In conversations with experts and state and district leaders, these three policies were the most cited barriers to innovation. As a result, they tend to be the policies that states address first when creating innovative policies or programs.

3. Personalizing learning and rethinking assessment are primary goals of states' innovation policies.

Of the seven states profiled in this report, six had innovation policies or programs in place with the goal of either moving toward a personalized, competency-based system of education or rethinking current assessment and accountability systems. Just one state, North Dakota, had a more broad and open-ended innovation program that provides districts the flexibility to define their own end goal.

Five themes are related to the implementation of states' innovative policies and programs:

4. Innovative solutions should be co-created with the community.

Designing innovative policies and programs with the community is critical at both the state and district level. Local students, families, teachers, and community members are closest to the problems that exist and know and understand their unique context in ways that situate them well to identify and implement innovative solutions to address those problems.

5. Poor policy design and communication can hinder states' efforts to catalyze innovation.

Some states have had more success catalyzing innovation than others. Design flaws in the policies or programs themselves and poor communication around the policy's or program's purpose and expectations were at the root of the challenges in several states.

6. A cohort model and partnerships with outside organizations provide the support and technical assistance districts need to innovate.

District leaders report that external supports are critical to the implementation process. In some states this support comes in the form of cohorts, where a small number of districts in the state are working to implement an innovative policy at the same time. Leaders of these districts get together to share lessons and challenges, brainstorm solutions, and provide thought partnership. In other places, states have helped districts connect with external nonprofits that can offer additional capacity and expertise during the implementation process.

7. A culture open to change, an early champion, and political backing are necessary conditions for district-level innovation.

When asked how they knew their districts were "ready" to take advantage of innovative policies and programs, leaders pointed to preexisting conditions including a district culture that embraces change and evolution, an individual or small group championing the innovation throughout the district, and key individuals or groups such as the local school board or a local politician backing the innovation.

8. Efforts to incentivize innovation often happen in silos within the education sector, but truly innovative and transformational approaches require multiple players at the table.

Many of the state and district leaders we spoke to took deliberate steps to ensure a variety of voices were included in decisions about innovation. Several of the state policies also required broad stakeholder engagement. Even so, in most cases, key perspectives, such as the social services sector or juvenile justice system, were left out. Policymakers and district leaders ought to continue to broaden the scope of who is included as innovations are designed and implemented.

States have an important role to play in creating the conditions necessary for districts to innovate. District leaders and the philanthropic community also have roles to play. Below are recommendations for each group.

Recommendations for State Policymakers

Engage local communities in the design of policies.

Students, teachers, families, school leaders, and community members understand the challenges they are facing and what solutions will work best. Policymakers must work closely with these stakeholders to design policies that will meet their needs.

Allow for locally driven variations in design and implementation within a clearly articulated and communicated framework of "what success looks like."

As state leaders create innovation policies and programs, they must cast and communicate a clear vision for success so that all stakeholders understand the goal of the policy. Importantly, however, while "success" must be clearly defined, innovation policies cannot be one-size-fits-all. Individual communities have unique needs, values, and circumstances, and policymakers must design policies that are flexible enough to account for different initiatives and outcomes across communities.

Provide funding and support structures (e.g., cohorts, partnerships with outside entities) to enable districts to take advantage of innovation policies.

District leaders need the funding, human capital support, and technical assistance to make real, sustained change over the long term. State leaders ought to embed these supports into the design of the policy to ensure districts have what they need to succeed.

Tolerate small-scale risk and be open to the possibility of failure.

Policymakers interested in catalyzing innovation must be tolerant of risk and aware that new initiatives might fail. Starting small, through pilot programs, is one way state leaders can mitigate the risk inherent in innovation.

Provide district leaders with examples of where flexibility already exists in state law — for example, existing seat time waiver processes or alternative graduation pathways.

State leaders can help district leaders understand what flexibility already exists in state law. States could offer professional development opportunities, compile and share examples of districts using existing flexibilities, or work with a third-party organization to analyze state law and identify and communicate existing opportunities.

Recommendations for District Leaders

Examine current state policies — in particular, seat time, graduation requirements, and assessment and accountability structures — to identify existing flexibilities and opportunities to innovate.

Flexibility in state law often exists that can enable district leaders to innovate, even in the absence of innovation-specific policies or programs. District leaders ought to understand the full range of what's allowed through existing state laws and regulations.

Engage teachers, families, and community members in creating a vision and in identifying what innovations are needed to achieve that vision.

District leaders must co-create a vision and process with the community to ensure they have a clear understanding of the problem(s) they are seeking to solve, and to ensure they obtain the support they need to work through challenges as they arise and to sustain change well into the future.

Create and maintain a cycle of continuous improvement.

Innovation is complex, long-term work that can run into myriad challenges. As district leaders cast a vision and design an innovation process alongside the community, they ought to embed into that process a strong feedback loop and continuous improvement cycle so that they can course-correct in real time to address challenges as they arise.

Recommendations for Funders

Convene policymakers, state and district leaders, and practitioners from various sectors of education (K-12, postsecondary, early childhood, etc.).

Through working groups or conferences, funders can support structured opportunities for education stakeholders to come together across sectors to share challenges, brainstorm ideas, identify lessons learned, and chart a path forward for the education system in a community or state.

Fund nonprofit organizations to support districts' innovative initiatives.

States often lack the capacity (technical, human, etc.) to provide the robust, in-depth support that districts need. Outside organizations can fill this gap, and funders can provide the critical support necessary for districts to contract with organizations on this important work.

Support state and district pilot initiatives.

Pilot programs can serve as the proof points that state leaders need to invest in larger-scale efforts to support innovation, and funders can provide the financial support states and districts need to launch a pilot program and track its success.

Support district leaders in analyzing current state law to identify existing flexibilities and opportunities to innovate.

While both state and district leaders have roles to play in identifying opportunities to innovate within existing laws and policies, funders can also support this work to inform leaders of existing opportunities. This could be especially powerful in states that lack the political appetite for creating innovation policies.

The U.S. public K-12 school system is ripe for innovation, and states have a variety of tools at their disposal to be at the forefront of catalyzing innovation and creating the conditions necessary for innovations to take hold and be sustainable.

Introduction

Innovation is critical to the evolution and advancement of any sector. It creates new options and choices for consumers and stakeholders, solves problems in new ways, and pushes the boundaries of what's possible. In the K-12 education sector, innovation is essential to overcoming long-standing achievement gaps and creating an education system that is dynamic, flexible, and personalized to the needs of individual students.

The current system is being asked to meet more needs for more kids than ever before — especially in the wake of the pandemic. However, policies and practices have not evolved quickly enough to meet those needs, and as a result, the system continues to fail far too many young people. Students from low-income backgrounds, students of color, students with disabilities, students who are homeless or in foster care, and students whose first language isn't English persistently achieve grade-level proficiency and graduate from high school at lower rates than their peers who are white, non-disabled, non-economically disadvantaged, or who speak English as a first language.[1]

Policymakers, practitioners, funders, nonprofit organizations, and school and community leaders have worked tirelessly and invested billions of dollars to address these long-standing disparities in education outcomes. While there have been pockets of progress in particular schools, districts, or communities, it has been far too slow and far too isolated. And much of that progress was upended by the COVID-19 pandemic: In 2022, scores on the National Assessment of Educational Progress (NAEP) dropped to historic lows, erasing decades of slow progress.[2] The declines were sweeping, touching nearly every student group, but were most pronounced for historically marginalized students.[3]

There's no question that the education system needs to evolve to better meet the needs of today's students. Yet there's little consensus about what to change or how to change it. Furthermore, experts disagree about whether the system itself can evolve, or whether we need to start over and build an entirely new system. Either way, the fact remains that the vast majority — 91% — of school-aged young people in the U.S. are educated in our current public school system.[4] State policy plays a critical role in that system and therefore is in a unique position to catalyze and support innovation in school districts. State policies can incentivize, fund, and encourage innovation, or they can discourage it and create barriers.

This report focuses on states that are working to catalyze innovation in school districts. What are the policy structures states commonly employ? How do they work? To what extent are districts taking advantage of them? What successes have emerged and what challenges remain? Through interviews with experts and desk research, we identified seven states (Colorado, Kentucky, Montana, New Hampshire, North Dakota, Utah, and Washington) that have taken a variety of approaches to fostering innovation in school districts. In some cases, the legislature has passed new legislation to remove barriers or create a new policy. In others, the state education agency has taken the lead by supporting districts to innovate within existing state law or by creating new programs to incentivize districts to try new approaches. We deliberately did not select states whose primary approach is innovation schools or zones (subsets of district-operated schools that are provided flexibility from certain laws and regulations with the goal of spurring innovation).[5] Much has been written about that approach, and we were eager to learn about other approaches and whether they are providing districts and schools with the flexible ecosystem necessary to innovate. In addition, it's important to note that we did not evaluate any state policies or attempt to determine their level of success; rather, we sought to describe the policies

states implemented, understand how districts are taking advantage of those policies, and surface themes and lessons across states.

Eight policy themes emerged from our analysis. The themes are broken up into two sections. The themes in the first section are related to the design of states' innovation policies, while the themes in the second look at the process of implementing those policies.

Themes related to innovation policy design:

1. Pilot programs, waivers, and additional funding are the most common levers states use to catalyze district-level innovation.

2. Most states' policies provide flexibility from common barriers to innovation, including seat time requirements, graduation requirements, and assessment and accountability structures.

3. Personalizing learning and rethinking assessment are primary goals of states' innovation policies.

Themes related to innovation policy implementation:

4. Innovative solutions should be co-created with the community.

5. Poor policy design and communication can hinder states' efforts to catalyze innovation.

6. A cohort model and partnerships with outside organizations provide the support and technical assistance districts need to innovate.

7. A culture open to change, an early champion, and political backing are necessary conditions for district-level innovation.

8. Efforts to incentivize innovation often happen in silos within the education sector, but truly innovative and transformational approaches require multiple players at the table.

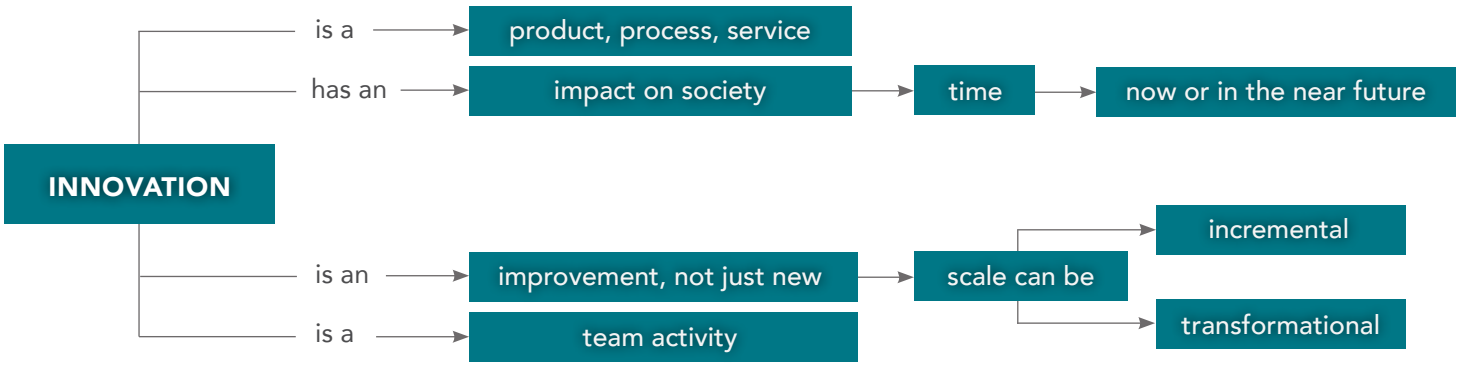
This report begins with a brief overview of what innovation is and how it manifests in the education sector before moving into a discussion of each of the eight policy themes. We end with a set of recommendations for education leaders and funders looking to create the conditions necessary to catalyze and support district-level innovation.

How Innovation Happens

There's no simple, agreed-upon definition of innovation in the education sector. Generally speaking, "innovation" is a new approach that brings about an improved result to a problem.[6] According to the National Academy of Engineering, there are several key components of what makes something an innovation (Figure 1):[7]

- Innovations create societal value.
- They improve on the current state or condition of something.
- They are a product (such as a new curriculum to raise test scores), process (such as a new way to evaluate student learning to incorporate factors other than assessments), or service (such as delivering hot, fresh, and healthy meals to a school that doesn't have a kitchen).
- They are evolutionary (leading to incremental, general improvements within the existing architecture of the current system) or transformational (bringing about a complete change, totally overhauling and/or replacing the old with the new, often in a short period of time).

FIGURE 1: COMPONENTS OF INNOVATION[8]



Source: Recreated from Educate to Innovate: Factors That Influence Innovation, National Academy of Engineering, 2015.

The education experts we spoke with stressed that to create a truly equitable education system, innovation must be a transformational process in which the American education system moves from its current, industrialized one-size-fits-all model to one that is personalized, flexible, culturally responsive, and meets the needs of the whole child. It isn't enough to make incremental changes (i.e., using a different curriculum or modifying a schedule); there must be a complete mindset shift of the adults in the system to bring about the kind of transformational change needed in America's schools.

According to the Canopy Project, which surfaces schools with innovative learning environments and documents their designs, "What innovative learning environments have in common is a drive to better meet the needs of students who have been least well served. They're doing that by challenging dominant assumptions — sometimes unspoken — that shape the design and daily routines of 'school' and advancing more humane approaches predicated on a recognition of students as complex individuals with varying strengths, backgrounds, and needs."[9]

So how does innovation happen? The process typically begins by identifying a problem or challenge to solve.[10] Individuals with a stake or interest in the problem generate solutions based on research or their own experiences. Once a solution or approach has been identified, it is tested or piloted with a subpopulation of those most impacted by the problem. If the pilot is successful, the idea may be scaled to the broader population that is impacted by the problem. All the while, the innovation is continuously refined and improved based on feedback from stakeholders.

Innovations typically happen either from the top down or the bottom up. Top-down innovations are generated at the state or even national level by policymakers or other stakeholders and communicated to those "on the ground" who will be owning much of the implementation. This approach to innovation can have the effect of pushing practitioners and local-level stakeholders to behave in ways that might be more effective in producing results, often influenced by rigorous research by federal and state agencies, academia, and think tanks.[11] However, top-down innovations can be hampered if they are not appreciated or supported by the public.[12] Bottom-up innovations, on the other hand, are context-specific solutions or ideas generated at the local level among practitioners, parents, or community leaders who are closest to the students and their families and have a unique understanding of the needs that exist. Ideally, this approach to innovation starts with the buy-in and support of those affected by the problem and those who will be implementing the solution. However, bottom-up innovations can be hampered if they are misunderstood, if they are found impractical or

unpopular, if they don't have the support of the public or political leadership, or if they have no administrative or financial support.[13] One approach isn't necessarily better than the other, and it's possible to envision a hybrid approach that combines the benefits of both top-down and bottom-up: where states are working in concert with practitioners and local stakeholders to create context-specific, on-the-ground solutions that have the state's political, financial, and administrative support.

While innovation follows a similar process in the education sector, there are some unique challenges that school and district leaders face. First and foremost, like many other public sectors, education systems are very hierarchical. Power is centralized at the top, held by superintendents and other district-level officials. This structure can offer predictability, efficiency, and a measure of quality control in which the district oversees everything from hiring personnel and budgets to selection of the curriculum.[14] However, it can be difficult for those who know students best — teachers and school administrators — to make large-scale or widespread changes to their school structure that could better meet the unique needs of their students and communities. In addition, the sheer size of many public districts, particularly those serving urban centers, can make innovation complex. Considerable disparity exists in the needs, cultures, and values of the many communities that compose a large district. And because districts are so large and complex, local, state, and federal policies can sometimes be in conflict with each other, detached from student performance, and unrealistic about what's possible with the resources that are available.[15] Finally, many school districts experience high rates of leadership turnover. Researchers estimate the average annual turnover rate of superintendents is approximately 13%;[16] however, rates are higher in districts serving more Black and Hispanic students.[17] When a new superintendent takes over, they often bring their own ideas and initiatives. This results in frequently changing priorities and ideas and a feeling of unstable leadership among stakeholders. Furthermore, because transformational education innovation can take years to actualize, an initiative may not even have time to get off the ground before it is scrapped in favor of something else by a new superintendent, leading to "innovation fatigue."[18]

Asking a system to operate differently than the way in which it was built to operate is incredibly hard work. Yet despite the challenges identified here, we must find ways to enable local communities to make the kinds of changes their schools need to better educate the children living in those communities. The remainder of this report examines states' efforts to catalyze innovation in school districts.

What innovative learning environments have in common is a drive to better meet the needs of students who have been least well served.

—CHELSEA WAITE, THE CANOPY PROJECT

How States Catalyze District Innovation

Through conversations with experts, we identified seven states — Colorado, Kentucky, Montana, New Hampshire, North Dakota, Utah, and Washington — that have recently implemented policies aimed at catalyzing innovation (Table 1). Analysis of these state policies, including desk research and conversations with state and district leaders, surfaced eight common themes about how states design and implement innovation policies. The eight themes are broken into two sections below.

The first section includes three themes about the design of the policies themselves — common levers states are using, the barriers to innovation states are trying to address, and the overarching goals of the policies. In the second section, we offer five themes related to the implementation process — how states support districts to do the work of innovation. Here, we surface themes related to barriers districts face as well as processes and supports that have helped them along the way. Throughout the discussion of themes, we reference the various policies states have enacted and how districts have leveraged those policies.

TABLE 1: OVERVIEW OF STATE INNOVATION POLICIES

State	Overview of Policy
Colorado	**Public School Local Accountability Systems Grant Program**[19]: Provides money to local education agencies that adopt local accountability systems that include additional measures for determining achievement and supplement the state accountability system.
Kentucky	**Local Laboratories of Learning (L3) Initiative**[20]: A partnership between the Kentucky Board of Education, Kentucky Department of Education (KDE), and the Center for Innovation in Education; cohorts of districts come together to design and pilot new local assessment and accountability systems.
Montana	**Transformational Learning Act**[21]: Provides four years of funding to districts with the goal of creating a flexible, student-centered learning system.
New Hampshire	**Learn Everywhere Program**[22]: Allows individuals or entities to apply to the state board of education for approval to offer programs or activities that can result in academic credit. Districts are required to accept credits from approved programs.
North Dakota	**Innovative Education Program**[23]: Allows districts to waive a long list of laws and regulations (e.g., school day length, accreditation requirements, compulsory attendance, and a variety of requirements related to curriculum and testing) with the goal of taking a more creative approach to the delivery and administration of providing increased educational opportunities.
Utah	**Personalized Competency-Based Learning (PCBL) Grants Program**[24]: Created a pilot program to provide grants to districts and charter schools to move toward a personalized, competency-based system; the Utah State Board of Education is currently running a planning grant program to support districts in moving toward PCBL, an implementation grant to support implementation of PCBL, and an expansion grant for PCBL.
Washington	**Mastery-based Learning (MBL)**[25]: The state board initially created a working group to identify barriers to MBL; in spring 2021, the legislature passed new legislation to begin implementing the recommendations of the working group, including the creation of the Mastery-based Learning Collaborative (MBLC), a cohort of grantee schools and districts working to implement MBL and identify tools and professional learning to inform future policy.

I. Innovation Policy Design

Theme 1

Pilot programs, waivers, and additional funding are the most common levers states use to catalyze district-level innovation.

State policymakers have a variety of levers at their disposal to create the conditions necessary for schools and districts to innovate. Creating pilot programs, offering waivers, and providing additional funding are the three most common approaches.

Pilot programs are short-term, small-scale trial runs that allow states to test the viability of a new idea or approach and refine it before rolling it out to all schools and districts in the state. States often create pilot program opportunities to which interested districts can opt in. Utah's PCBL program, for example, began as a pilot that included 45 schools in six school districts.[26] Those schools documented their successes, challenges, and lessons learned, and paved the way for the expansion of the program, which now includes more than 300 schools.[27] In Colorado, legislation created the Public School Local Accountability Systems grant program, which authorized education providers, including charter schools, school districts, or boards of cooperative services, to create a pilot local accountability system to measure student performance.[28]

Waivers are another common lever that states use to catalyze innovation. Districts can apply to the state to waive certain laws or regulations in order to undertake an innovative approach to teaching and learning. North Dakota's Innovative Education Program allows districts to waive many laws, including school day length requirements, accreditation, compulsory attendance laws, and a variety of requirements related to curriculum and testing.[29] The Northern Cass School District in eastern North Dakota leveraged these flexibilities to eliminate letter grades in order to create a proficiency-based curriculum aligned to learning standards.[30]

States can provide additional funding to support districts as they implement innovative programs and approaches. Many of the state laws and programs highlighted here included modest funding for participating districts, typically distributed through a competitive grant process. In Utah, the state initially allocated $369,000 to support the pilot and provide grants to participating districts and charter schools.[31] In the first year of Colorado's local accountability program grant, the state awarded 11 grants totaling $448,025.[32] Washington legislators allocated $5 million to support the first two years of the MBLC, while the Washington Office of Superintendent of Public Instruction is funding the third year of the project through Elementary and Secondary School Emergency Relief (ESSER) funds.[33] And Montana's Transformational Learning Act provided four years of funding to participating districts to support the planning and implementation of transformational learning programs.[34]

While not the only levers states have at their disposal, pilot programs, waivers, and funding are the most commonly used. They provide the incentives and permission districts need to engage in the hard work of innovation.

UTAH

Supporting districts to move toward personalized, competency-based learning systems.

Challenge

In 2015, state policymakers in Utah began to question whether the state's high schools were preparing students with the skills and dispositions needed to be successful after graduation.[35] Those conversations led the Utah State Legislature to create the PCBL Grants Program in 2016, which established a pilot program that provides grants to districts to support their move toward a personalized, competency-based system.[36]

Policy Design

The Utah State Board of Education currently operates a planning grant program to support districts in the initial phases of planning their move toward PCBL,[37] an implementation grant to support the early implementation of PCBL,[38] and an expansion grant that supports districts in their implementation of PCBL beyond the early stages.[39] Grantees are part of a cohort and receive technical support from the Mastery Transcript Consortium and TNTP.[40]

Policy Implementation

The Juab School District, a small, five-school district in central Utah, was one of the first districts to take part in the pilot of this program in 2020 and then received an implementation grant in 2021.[41] The district engages in a personalized model that tailors learning experiences to where students are academically and what standards they need to master. One of the Juab School District's first competency-based projects was to create a standards-based report card, which allows parents and teachers to have a deeper understanding of how students are learning and growing.[42] This focus on standards also comes through in the district's approach to credit recovery. Previously, if a student failed to pass a course, they would be assigned a work packet to complete to earn their credit. The packets did not necessarily target a student's needs and had low completion rates. Now, a student's credit recovery is based on targeted standards. Once they demonstrate proficiency on the relevant standards, they receive the credit.[43]

Because the shift to PCBL often includes a steep learning curve for teachers, the Juab School District created a professional learning system that allows teachers to earn micro-credentials for completing professional development courses that are aligned to their job contexts, the district's mission and vision, and Utah's professional learning standards.[44] The district awards a one-time stipend to teachers who earn a micro-credential.[45] Teachers can also use their micro-credentials to earn credit toward their re-licensure and earn university credit, which helps them move up on the district's salary scale.[46]

The Ogden School District is a small school district serving nearly 12,000 students in northern Utah. It received a planning grant in 2021 and an implementation grant in 2022.[47] Prior to the state's creation of the PCBL grant, the district had been working to develop new and enhance existing personalized learning pathways such as career and technical education (CTE), science, technology, engineering, and mathematics (STEM), international baccalaureate, and Advanced Placement. The PCBL grant provided an extra level of support that allowed the district to dramatically expand its personalized pathways work by hiring a full-time staff member dedicated to PCBL, providing a network and community to strengthen the view of what PCBL can look like, and connecting the district to outside partners that could help move the work along.[48] Through the PCBL grant program, Ogden School District invested in PCBL professional development, including personalized one-on-one coaching for educators in the district.

Theme 2

Most states' policies provide flexibility from common barriers to innovation, including seat time requirements, graduation requirements, and assessment and accountability structures.

In conversations with researchers, innovation experts, and state and district leaders, three policies surfaced as primary barriers to district-level innovation: seat time, graduation requirements, and assessment and accountability structures.

Seat time policies require a set number of hours that a student must attend a class to earn credit. Course credits are based on the Carnegie Unit system, which awards academic credit based on the number of hours a student has studied a subject. (For example, 120 hours typically equals one credit; this breaks down to four to five class meetings of 40 to 60 minutes per week for an academic year.)[49] Seat time policies do not account for student mastery — students must be present in class to earn credit — and therefore make it difficult for schools and districts to innovate. Most districts cannot make major changes to the structure of their school day or year, implement mastery-based approaches, or account for learning that happens outside the walls of the school building. Michael Hakkarinen, education specialist at the Utah State Board of Education, says, "We need to stop limiting the innovation of our schools because of these parameters — 180 school days, 990 hours, what is the minimum school day — all of those kinds of things hamper the innovation that is necessary to really shift the needle to personalize competency-based learning and this learner-centered paradigm."[50] These predetermined hours can have the effect of slowing down more advanced students or forcing struggling students to move on to the next concept before they are ready. Because of these challenges, all 50 states and Washington, D.C. have policies in place that allow some degree of flexibility to districts to award course credit based on content mastery rather than seat time.[51]

States frequently leverage and extend this flexibility when developing policies and programs to incentivize innovation. For example, Montana's Transformational Learning program allows districts to create flexible systems of student-centered learning, which can include creating their own definitions of proficiency to measure content and course mastery separate from seat time.[52] North Dakota's Innovative Education Program allows districts to waive a long list of policies, including seat time.[53] Districts like Northern Cass in eastern North Dakota have taken advantage of this waiver to make dramatic changes in their schools, including eliminating grade levels, prioritizing proficiency-based curricula, and eliminating A-F letter grades. As Cory Steiner, superintendent of Northern Cass School District, explains, "We don't talk pace, we consider that a four-letter word in our district. We talk about progress. That means you can go faster if you need to, you can go slower, you can stay right where everyone's at. We have a goal that we want to have multi-age classrooms. … I want people to be able to say, 'Oh, that learner is a level five for ELA, but they're only a third-grader by age.' I want them to identify with where they're at in their learning and not where they're at with their chronological age."[54]

Utah's PCBL Grants Program provides districts with resources, human capital, and a peer network to pilot initiatives that move toward a personalized, competency-based system that relies on students' mastery of standards rather than the amount of time they spend in class. As part of the state's first cohort, the Juab School District used flexibility from seat time to implement competency-based initiatives and a learner-validated attendance policy, in which a student can miss time from class but still be credited for attendance if they demonstrate mastery or complete assignments and other expectations.[55] This allowed the district to create flexible student scheduling while working within the confines of the state-mandated school calendar. After the COVID-19 pandemic, the legislature took the learner-validated attendance policy

from the Juab School District and scaled it statewide.[56] In New Hampshire, the Learn Everywhere program[57] allows approved non-school-district entities, such as foreign language schools or sports clubs, to award academic credit to students who complete their approved programs. For example, a local karate club could award physical education credit, or a local STEM-focused club could award a science credit.[58] While the program is still young and not widely accessed, it has laid the groundwork for New Hampshire students to earn course credits outside the walls of the traditional school system.

Existing graduation requirements are another commonly cited barrier to innovation. States set certain requirements for the coursework students must complete and the number of credits students must earn to receive a high school diploma. While more than half of states provide some flexibility in terms of requirements or additional pathways to graduation,[59] these expectations can still constrain the kinds of learning experiences students have access to and the ability of districts to innovate. States and districts are working to find ways to think about and measure school success beyond just test scores and provide space and flexibility for districts to adopt new ways of assessing a student's readiness to graduate.

As a first step to defining success aside from test scores, many states have created "portraits" or "profiles" of a graduate. These profiles identify the skills and competencies that stakeholders (parents, teachers, community members, business leaders, etc.) believe students need to learn in school to be successful and productive adults. Utah's portrait of a graduate, for example, measures skills and concepts including academic mastery, communication skills, critical thinking and problem-solving, and hard work and resilience.[60] North Dakota's includes empathy, learner mindset, and adaptability.[61]

Once states have created these profiles, they must begin the work of adjusting graduation requirements to align with their profiles. In Washington, the state board of education initially convened an MBL Work Group to identify barriers to mastery-based learning

and explore ways to increase student access to opportunities aligned to their career and postsecondary goals.[62] In spring 2021, the legislature adopted legislation to extend the MBL Work Group to continue its development of recommendations around MBL and to develop the Profile of a Graduate. The bill also tasked the state board of education with reviewing the Profile of a Graduate and allowed the board to provide recommendations to better align graduation requirements with that profile.[63]

Another approach some states have taken is to provide students with alternative means for earning credits. While these policies do not fully remove the graduation credit-requirement hurdle, they provide students multiple ways to earn the credits they need to graduate. North Dakota, for example, passed a law in 2021 that allows students who are missing credits to participate in an alternative curriculum or earn a passing score on the relevant portions of the GED certificate to earn their missing credits.[64] This has been especially powerful for the North Dakota Youth Correctional Center (YCC), which is responsible for educating justice-involved youth, many of whom are under-credited. Michelle Pfaff, director of education for the North Dakota Department of Corrections and Rehabilitation, explains: "[In the first year of the program] we've had three students finish high school this way. It's been successful, where kids pass the GED test, that fulfills the credit requirements that they had open, and they earn their high school diploma."[65]

Accountability and assessment systems are the third major policy barrier cited by experts and state and district leaders. Most states' assessment and accountability policies are structured to require teachers to teach a set of content- and grade-specific standards that are assessed using a statewide standardized assessment. Teachers, schools, and districts are held accountable for the results of those assessments, which can mean there is little incentive to invest resources and capacity in initiatives that are not included in the assessment, therefore limiting districts' incentives to innovate.

Several states have begun experimenting with alternative assessment systems that use multiple measures of student achievement. In many cases, districts are provided with some choice and flexibility over additional measures, giving district leaders the opportunity to work with their students, teachers, parents, and communities to design an assessment and accountability system that accounts for factors most important to those stakeholders. Colorado's Public School Local Accountability Systems Grant Program, for example, authorizes districts to create local, student-centered pilot accountability systems for measuring district performance.[66] The Cañon City Public Schools District in southern Colorado now evaluates its schools using a rubric that includes indicators such as a school's climate and culture, student health and social-emotional wellness, and improvement of instruction and learning.[67] These measures allow the district to define and measure the factors that the local community values in a successful school system.

In Kentucky, the state board of education partnered with the nonprofit Center for Innovation in Education to establish the L3 Initiative. Participating districts are part of a cohort designing a new assessment and accountability system. One of the first activities that Kentucky's Jefferson County Public Schools undertook was to design a "Backpack of Success Skills"[68] similar to the Profile of a Graduate described above. Students collect evidence and artifacts that demonstrate their mastery of the skills, and they defend their Backpacks in transition grades (5, 8, and 12).[69] As part of this cohort, they are building on their "Backpack" foundation by piloting opportunities for students to earn credit and add artifacts from learning that occurs outside the classroom.[70]

While there are likely many other policies that hamstring districts' ability to innovate, these three — seat time, graduation requirements, and assessment and accountability systems — were most frequently cited by innovation experts and education leaders as the primary barriers to district innovation. These policies tend to be the first targets for change in states that are making concerted efforts to catalyze innovation.

NORTH DAKOTA

Providing policy flexibility to encourage districts to develop innovative education programs.

Challenge

District leaders lacked the policy flexibility they needed to meet the unique needs of their students.

Policy Design

In 2017, North Dakota legislators passed Senate Bill 2186, which allows districts and schools to apply for waivers to develop Innovative Education Program proposals.[71] The law allows districts to waive many laws, including school-day length requirements, accreditation requirements, compulsory attendance laws, and a variety of requirements related to curriculum and testing. The goal of this program is to provide districts with the freedom and flexibility to approach student learning in creative ways that increase student educational opportunities.[72]

To participate, schools or districts go through a planning proposal process that includes developing a rationale and vision, engaging stakeholders, gaining school board approval, and establishing a professional development plan for educators aligned to the proposed innovative education program.[73] After an initial planning year, districts submit a comprehensive implementation application, which the North Dakota Department of Public Instruction approves for up to five years.[74]

Policy Implementation

In eastern North Dakota, the Northern Cass School District's Innovative Education Program includes eliminating grade levels and traditional A-F letter grades. Northern Cass' leaders believe that students should be mastering skills and standards and that every student's progress toward those skills and standards is going to look different. As a result, students should progress through content at their own pace as they master it, rather than according to a specific grade level.[75] In addition to getting rid of grade levels, the district prioritized a proficiency-based curriculum aligned to learning standards and eliminated the traditional A-F letter grading system.[76] Now, all courses have a set of priority standards on which students must demonstrate mastery using a proficiency scale of 0-4 (with 3 being proficient).[77] Instead of receiving an overall letter grade for a course, students receive an average proficiency score based on their mastery of the priority standards.[78]

These transformational policies were not widely embraced at first. District leaders shared that parents were concerned that doing away with traditional grades might hurt their children's ability to go to college or to access scholarships that are based on traditional grade-point averages. Hearing these concerns, the district worked with the state's public higher education institutions and the state legislature to ensure that these changes would have no impact on students' postsecondary access.[79] The district has also engaged parents throughout the implementation process, by creating a parent advisory board and by inviting parents to the school for site visits where they could get a tour and spend time in classrooms. For Northern Cass district leaders, transparency was critical in winning over parents.

NORTH DAKOTA *cont.*

Providing policy flexibility to encourage districts to develop innovative education programs.

In eastern North Dakota, West Fargo School District is leveraging the Innovative Education Program to move toward a personalized learning approach, removing seat time requirements in order to provide students more opportunities to engage in career-based learning experiences.[80] Moving from a traditional learning environment to a personalized learning environment requires building teacher skills and competency. Therefore, the district also modified its school calendar to allow for four off-site learning days a year, two per semester. One of the greatest benefits of these professional learning days is greater vertical collaboration among primary and secondary school teachers and leaders.[81] These educators are learning together, fostering relationships, and bringing their new learning back to their respective schools.

The North Dakota YCC is using the Innovative Education Program to support students in completing credits necessary for high school graduation. YCC leaders noticed that many students came to them with a patchwork of courses and learning experiences.[82] A student might, for example, have started but not completed a course in their home school, leaving them with some proficiency in the skills and standards but not enough to be represented on a transcript. As a result, students were constantly restarting classes despite already having some content knowledge. YCC received a seat time waiver through the Innovative Education Program and can now assess students on individual standards to determine what they already know, then prioritize standards students have yet to master. Students can leave YCC with credits to apply to their home school or, depending on how long their commitment is or how far along they are in their education, they can achieve a high school diploma or a GED diploma.

One of the greatest benefits of [West Fargo School District's] professional learning days is greater vertical collaboration among primary and secondary school teachers and leaders. These educators are learning together, fostering relationships, and bringing their new learning back to their respective schools.

Theme 3 Personalizing learning and rethinking assessment are primary goals of states' innovation policies.

Of the seven states profiled, just one, North Dakota, has a broad and open-ended innovation program that provides freedom and flexibility to districts to innovate as they see fit. The other six states enacted innovation programs with more clearly defined goals focused on personalizing students' educational experiences. The policies and programs in Montana, New Hampshire, Utah, and Washington drive toward a competency-based system that prioritizes content mastery rather than seat time. In Colorado and Kentucky, innovation policies are designed to rethink assessment and accountability systems to better match what communities want and need from their schools.

Montana's Transformational Learning Act, Utah's PCBL Grant Program, and Washington's MBLC all have competency-based education (also called proficiency-based, mastery-based, personalized, or next-gen learning) as the goal. New Hampshire's Learn Everywhere program is slightly different, allowing students to earn mastery-based credits from approved programs outside of the school district rather than incentivizing districts to move toward a competency-based system (the state did that nearly two decades ago, in 2005).[83] In the competency-based education systems these states are driving toward, students are assessed regularly, have multiple opportunities to demonstrate mastery of standards and competencies, and progress through content and competencies at their own pace.[84]

Colorado and Kentucky are focused on rethinking assessment and accountability to better capture all the characteristics that make a student college- or career-ready, rather than focusing solely on test scores. Colorado's Local Accountability System Grant program enables districts to create local accountability systems to supplement the state's system. Local accountability systems may be designed to evaluate student success using multiple measures, evaluate the capacity of the public school systems, and engage in a cycle of continuous improvement to support student success.[85] Some of the districts participating in Kentucky's L3 Initiative created a portfolio assessment system where students collect artifacts and evidence that demonstrate their mastery of content standards and then share and defend their portfolios in key transition grades.[86]

States and districts often develop and use profiles or portraits of a graduate (discussed in Theme 2) as a vision and guide for these competency-based education and new assessment systems.

COLORADO

Supporting districts to create localized accountability systems.

Challenge

Colorado's state accountability system was developed in 2009. It is still in place today, more than a decade later. According to Lisa Medler, executive director of accountability and continuous improvement at the Colorado Department of Education (CDE), "People were getting restless and interested in experimenting. Districts had some ideas that they were interested in pushing forward."[87] In particular, district leaders expressed concern that the state's assessment system didn't account for factors that their local communities cared about — such as equity of opportunity, innovative instructional practices, or school culture — and were interested in developing more locally relevant accountability systems.

Policy Design

In 2015, 14 rural school districts came together to develop an expanded vision for student accountability that included additional, localized measures of student performance and growth.[88] In 2019, encouraged by the work that this group of districts had been doing, the Colorado legislature passed the Public School Local Accountability Systems bill, which authorized districts and other local education providers (such as charter schools or boards of cooperative services) to develop and pilot local, student-centered accountability systems to measure student performance.[89] The bill included grant money that local education agencies could apply for to operate the pilot program.[90]

Policy Implementation

CDE approved applications and began awarding grants under the Local Accountability Systems Grant Program in March 2020 — right as COVID-19 began its rapid spread across the world. As a result, districts that received a grant had to pivot quickly, and much of the work related to developing local accountability systems was put on hold. Due to the disruption to project timelines, CDE gave grantees a one-year, no-cost extension to complete the work of year one. Even so, challenges continued. State assessments were canceled in spring 2020 (and participation was low in 2021) and students were continuing to transition between remote, hybrid, and in-person instruction due to the pandemic. Districts could not conduct assessments of students, evaluate their accountability systems, or conduct diagnostic reviews during that time.[91]

The districts that received funding in March 2020 to begin new projects are still early in their work. However, prior to the state's creation of the Local Accountability Systems Grant Program in 2019, several districts had identified a need for more localized accountability metrics and had begun doing that work on their own. When the state's grant program was announced, these districts were able to take advantage of the additional financial resources and networking opportunities.

Cañon City Schools, for example, began using a locally created rubric to assess its schools in 2015,[92] through a process known as Instructional Program Reviews.[93] In 2018, the district undertook a revisioning process and created the Student Empowered Learning Framework and local profile of a graduate,[94] both of which identified the traits and skills students needed for success post-high school graduation. The district also updated its Instructional Program Reviews rubric that year and in 2019, piloted a new version in the district's only high school. The district made revisions following that pilot, then used the rubric districtwide in spring 2020 and spring 2021.

COLORADO *cont.*

Supporting districts to create localized accountability systems.

Although the Cañon City School District began its work before receiving the Local Accountability Systems Grant, the grant has provided the district with funding to elevate their work through professional development for teachers and engaging outside expertise to support district leaders.[95] Since the initial implementation of this assessment system, the district created a dashboard that provides a trend analysis for how its schools are performing on the local accountability measures year-over-year from 2020. Ratings and summary data are shared with the school community.[96] From the district's perspective, this is important to reinforce whether the right measures are being captured as the needs of parents, students, and school staff change.

In 2017, district leaders at Jefferson County Public Schools began working to create School Insights, a public dashboard that allows school principals and teachers, school board members, families, and community organizations to access over 40,000 school-level data points on assessments, enrollment, programming, and culture.[97] When the Local Accountability Systems Grant Program launched in 2019, the district saw it as an opportunity to support the School Insights work. In the first year of the grant program, Jefferson County did not apply for any funds; rather, they saw the grant as an opportunity to network with other districts, learn how other districts engage their communities through transparent data, and understand different approaches that districts take to making data publicly available and holding schools accountable for learning.[98] In the second year of the grant, Jefferson County did apply for, and receive, funding to use to create and launch District Insights, an internal version of School Insights that allows district and school-level staff to go deeper on the public-facing data for purposes such as school improvement.[99]

According to Jefferson County, School Insights is widely used throughout the district, including by new superintendents who want to learn about schools, school board members who use the data to prepare for school visits, and families who explore the website during open enrollment to inform decisions about where to send their child to school.[100]

Leaders in Jefferson County saw the grant as an opportunity to network with other districts, learn how other districts engage their communities through transparent data, and understand different approaches that districts take to making data publicly available and holding schools accountable for learning.

II. Innovation Policy Implementation

Theme 4 Innovative solutions should be co-created with the community.

While state policy helps create the conditions necessary for districts to innovate, it is not sufficient in and of itself. Research and conversations with experts and leaders consistently pointed to the need for innovative ideas and solutions to come organically and authentically from the "ground" — from the students, families, and community members that the district serves.

Policymakers understand the importance of local community engagement and buy-in, and in some cases, have designed innovation policies that require districts to engage the community in the innovation process. North Dakota's Innovative Education program, for example, requires participating districts to engage their community in the development of their plans.[101] This engagement has been essential in the Northern Cass School District, where transformational policies such as eliminating grades were not widely embraced at first. Parents were concerned that doing away with traditional grades might hurt their children's ability to go to college or access scholarships. In fact, the district worked with public higher education institutions in the state and with the state legislature to ensure that these changes would have no impact on students' postsecondary goals. The district also created a parent advisory board and allows parents to tour schools and visit classrooms to ensure ongoing engagement.[102]

Some states are actively trying to take a back seat on policy design, adjusting as districts tell them what they need rather than leading the charge. For example, Colorado's Local Accountability System pilot program was created from work that a group of school district leaders undertook on their own, rather than instructions from the legislature or state department of education. As Lisa Medler, executive director of accountability and continuous improvement at CDE, explains, "The grant was not an idea pushed by the department. It bubbled up from districts that had some ideas that they were interested in pushing forward."[103] The work that districts are doing through this program continues to center local community ideas and leadership. The local measures that districts have adopted include social-emotional learning, school culture and climate, stakeholder engagement, and other domains important to their local communities.[104]

In Kentucky, both the state commissioner of education and the team in the department of education's division of innovation are taking an approach to innovation that puts local communities in the driver's seat. As David Cook, who leads the KDE's Division of Innovation, explains, "We're trying to rethink the role of the state agency. It has always been, 'We make the policy, and you go do it.' Now, we're looking at local communities to see what's standing in their way."[105] The state's L3 Initiative embodies this approach. It provides resources and support to local districts to design and implement new accountability systems. As districts do that work, Cook and his team are listening to the challenges and pain points that emerge in order to adjust the department's policies and regulations to make the work easier.

Allowing local communities to drive innovation, rather than the state, increases the chances that school and community members will see the innovation as meaningful and beneficial, leading to a greater likelihood of sustained change and improvement over time.

KENTUCKY

Districts as laboratories of innovation to inform state policy.

Challenge

In 2021, Kentucky's superintendent of education embarked on a listening tour to learn about how communities across the state experienced the public school system.[106] As a result of the listening tour, the KDE convened a group of more than 50 stakeholders to form the Kentucky Coalition for Advancing Education. Those stakeholders created United We Learn, Kentucky's vision for a new and improved public education system.[107] As part of this vision, state leaders are working to bring together a variety of stakeholders, including students, families, teachers, administrators, and business and community members, to create a student-centered learning system.[108]

Policy Design

As part of the United We Learn Campaign, KDE partnered with the Kentucky Board of Education and the Center for Innovation in Education to launch the L3 Initiative. The L3 Initiative brings together cohorts of districts to design and pilot new local assessment and accountability systems and share lessons with KDE to inform future policy design.[109]

Policy Implementation

The Jefferson County and Allen County Public Schools districts were part of the first cohort of districts to take part in this initiative. Both districts designed local portraits of a graduate that include a variety of measures of success and are moving toward an assessment system where students present work products and artifacts that demonstrate their mastery of those measures.[110]

Jefferson County's portrait of a graduate is called the Backpack of Success Skills. It measures each learner on five success skills: prepared and resilient learner, globally and culturally competent citizen, emerging innovator, effective communicator, and productive collaborator.[111] Students collect evidence or artifacts that demonstrate learning and mastery for each skill as early as kindergarten. At each transition grade — 5, 8, and 12 — students defend their learning at a public defense. Allen County is still prototyping its profile and so far, has implemented exhibitions of learning, student-led conferences, and a limited number of competency defenses for high school students.[112]

As part of the L3 Initiative, the districts are expected to gather input from stakeholders, including experts and individuals who work with families from systemically disenfranchised communities.[113] To this end, Jefferson County created an advisory group of stakeholders that was initially asked to provide input into the challenges that families were facing.[114] The group continues to provide ongoing input about current and future initiatives. One piece of feedback Jefferson County received was that the Backpack of Success Skills defenses felt "cookie-cutter" — that students were presenting many of the same artifacts, despite having many more experiences that district leaders believed students could be drawing from.[115] There were also differences among the rubrics that schools across the district were using to evaluate students' defenses, creating inconsistencies across schools. Now, as part of the district's work with Ohio Valley Educational Cooperative, a consortium of school districts in north central Kentucky, Jefferson County is working with its "deeper learning" team to both standardize the rubrics across the district and ensure that students have more voice and choice in the artifacts they select for their defenses.[116]

Theme 5 Poor policy design and communication can hinder states' efforts to catalyze innovation.

Design flaws and poor communication about vision and goals can hamper the implementation of any policy, including those aimed at catalyzing innovation in school districts.

Several leaders noted challenges with the way their states' policies were designed. For example, in New Hampshire, the Learn Everywhere program suffered from a lack of initial funding, meaning that there was no dedicated staff to oversee the program in its early days and little incentive for organizations to participate.[117]

In Montana, the Transformational Learning Act was initially conceived as a competitive grant, where districts would design a plan that reflected the state's vision for a proficiency-based system and apply to the state for funding to implement that plan.[118] However, opposition to a competitive process from some education leaders in the state meant that the funding was ultimately distributed to districts on a first-come, first-served basis.[119] This meant that the state did not account for the extent to which a district's plan reflected its vision as it distributed funding. Today, less than half of the 35 schools and districts participating in the program describe in their plans using the funds to advance personalized, proficiency, or standards-based learning, or similar policies that could actualize the state's vision for the program.[120]

Communication, including a clearly articulated vision and documentation about how the program works, is also critical to the success of states' innovation policies. When communication is poor, stakeholders don't understand the program and misinformation can run rampant. In addition to a lack of initial funding, New Hampshire's Learn Everywhere program suffered from early mixed messages about what the program is and how it works. It received considerable pushback from both the teachers union (because approved credit-bearing courses would be taught by uncertified individuals) and school districts (as they'd be forced to accept credits from outside entities) and, absent any clear communication about those concerns, misinformation spread quickly.[121] Implementation has been challenging and the program has been slow to get off the ground in part due to these early communication issues.

In Utah, state leaders learned that acronyms and buzzwords can confuse teachers and families and unnecessarily politicize initiatives. As Michael Hakkarinen, education specialist at the Utah State Board of Education, explains, "When we work with parents, we use 'learner-centered,' as it is more understandable than the term PCBL. We say 'social-emotional learning' with a focus on 'student wellness' instead of using the acronym SEL. And we stopped talking about 'student agency' and instead say 'learner agency' because we want to point out that parents and teachers and even district leaders and administrators are learners and need to have agency over their professional learning."[122]

The importance of clear communication is true at the district level as well. Leaders in Utah's Juab School District learned the hard way the importance of early and clear communication with families. In reflecting on the early days of the district's work implementing a competency-based system, Assistant Superintendent Royd Darrington says, "We do have community members that we left out or didn't bring along appropriately. We missed opportunities within our district to better educate our community. And some of the things that we thought were being communicated, were not being communicated. So, there have been ups and downs and we have to take ownership of all of those things."[123]

MONTANA

Transforming learning through student-centered education.

Challenge

Policymakers in Montana wanted to create a policy environment that encouraged districts to customize learning to each student's needs and "focus on each pupil's proficiency over content."[124]

Policy Design

In 2019 the Montana legislature passed the Transformational Learning Act, which provided four years of funding to districts to support them in designing and implementing a flexible, student-centered learning system.[125]

Policy Implementation

The Transformational Learning Act underwent several changes to its design prior to, and just shortly after, passage, creating some implementation challenges that impact the grant's potential for success. Initially, state lawmakers envisioned the Transformational Learning program to be a cohort model where funding would be provided to districts through a competitive grant process and districts came together regularly to share and discuss their work.[126] However, opposition to competitive grants from some education stakeholders led the legislature to create a first-come, first-served process where districts received funding in the order they submitted their applications, until funding ran out.[127] In 2021, the legislature converted the program to a lottery process.[128] One challenge with this approach to grantmaking is that there is no process by which the state can evaluate applications based on the strength of their plan for implementing student-centered learning in their district. So long as a district submits a completed application, it can be entered into the lottery for funding.[129]

These early implementation challenges cloud the potential for the program to truly transform education. Ultimately, an analysis of the district's transformational learning plans found that less than half of the 35 participating schools and districts described using the funds to advance proficiency-based learning.[130]

That said, there are some districts that are leveraging the Transformational Learning Act to provide student-centered and proficiency-based learning opportunities. District leaders in the Great Falls, Lockwood, and Reed Point school districts say that the grant's funding mechanism allows them to invest in professional development and programs and initiatives to meet the needs of all learners.[131]

For example, in the Great Falls School District, leaders looked at their alternative high school, which provides flexible opportunities for students to earn the credits they need to graduate, and wondered why they couldn't provide those same opportunities to all high school students, regardless of which school they attended.[132] Leaders described the Transformational Learning Act as the "financial and philosophical nod" to do high school differently for all learners in the district.[133] Removing seat time requirements allowed students to enroll in the district, complete remote learning, and earn credit toward graduation while pursuing other opportunities such as ballet in Russia or hockey in Massachusetts.

MONTANA *cont.*

Transforming learning through student-centered education.

The Transformational Learning Grant has also supported districts in providing students with early postsecondary opportunities, including dual credit and workforce training. The Great Falls School District, for example, coupled funding from the Transformational Learning Act with the Advanced Opportunities Grant and partnered with the local United Way to launch the Transformational Workplace initiative, where students take classes for half the day and work or complete a dual credit course at a local college for the other half of the day.[134] Reed Point School District credits the investment in early postsecondary opportunities with helping students complete high school and persist in college.[135]

Finally, both Reed Point and Lockwood School districts used funds from the Transformational Learning Grant to support a shift away from traditional A-F letter grading toward standards-based grading and report cards. Leaders in these districts say the transition was a challenge for parents and students who were used to seeing simple letter grades; however, time and communication helped those stakeholders see the value in understanding specifically where a student is academically strong and where there are opportunities for growth.[136]

Leaders in the Great Falls School District described the Transformational Learning Act as the "financial and philosophical nod" to do high school differently for all learners in the district.

NEW HAMPSHIRE

Crediting students for learning outside of the classroom.

Challenge

State leaders recognized that many of New Hampshire's students participate in activities outside of school, such as taking dance or foreign language classes, that provide them with important skills and knowledge. However, students were not able to earn credit for that learning. State leaders wanted students to be able to receive credit for the learning that was taking place outside of the traditional school environment.[137]

Policy Design

In 2018, New Hampshire passed Senate Bill 435, which created the Learn Everywhere Program.[138] This program allows individuals and entities to apply to the state board of education for approval to offer programs or activities that can result in academic credit. For example, a local karate club can award physical education credit, or a local nonprofit or for-profit STEM-focused club could award a science credit.[139] Public school districts are required to accept credits from approved programs.

Policy Implementation

The Learn Everywhere program has gotten off to a relatively slow start. Between July 1, 2021 and June 30, 2022, just eight students total were enrolled in approved programs, and only two of the 13 approved programs had one or more students enrolled (one program had one student while another had seven).[140] While two new programs have been approved and began offering programming in fall 2022, four programs had their approval expire in 2022 and elected not to renew it.[141]

Several early implementation challenges underlie the program's slow start. Initially, the state did not invest resources to hire staff or market the program.[142] This resulted in a lack of understanding about what the program is and how it works. Teachers unions and school districts, for example, pushed back against the program, expressing concerns about accepting credits for core subjects (i.e., math, science, and foreign language) from outside entities taught by uncertified teachers.[143] The state created a rigorous process for program design, feedback, approval, and oversight, but it was not communicated effectively and therefore not well understood by important stakeholder groups.[144] Moreover, the underinvestment in staff meant little support was available for potential providers, delaying the processing of applications and other documents.[145] While the program now has a director to oversee it, the ongoing lack of funding creates a massive equity concern. Most (though not all) of the approved programs cost money, so students are only able to access those programs if their families are able to pay.[146]

Despite the design challenges, leaders of approved programs remain excited about the opportunities they make available to New Hampshire's students. Friends Forever International (FFI), for example, is an international nonprofit that works with communities around the world to help students from diverse backgrounds build their leadership competencies while tackling local and global challenges.[147] FFI's educational program offers a total of 37 credits in courses that include leadership, social studies, creativity and arts, science, healthy living, adventure education, English, and special education electives.[148] Each course consists of three modules with three to five synchronous 90-minute sessions, equals one-half credit, and is designed to align with New Hampshire's minimum standards for graduation.[149] FFI offers its programs free of charge to interested students, covering all tuition and associated costs such as transportation, meals, and anything else students may need to fully participate in the program.[150]

NEW HAMPSHIRE *cont.*

Crediting students for learning outside of the classroom.

Another provider is the New Hampshire Academy of Science (NHAS), a STEM outreach center that introduces middle and high school students to rigorous, hands-on science and engineering activities.[151] NHAS was the first organization to be approved as a Learn Everywhere participant. NHAS awarded seven credits in 2021 and 11 credits in 2022, the most of all participating programs.[152] Participating students work on research projects at the NHAS lab for three to five weeks in the summer months and, at the end, present their research to STEM professionals from the New England region.[153] Students can earn credits in life and physical sciences such as physics research, chemistry research, and biology research.[154] NHAS leaders see the Learn Everywhere program as an opportunity to engage rural and low-income students who might not otherwise have signed up for their program or be interested in science at all.[155] By exposing students to advanced, hands-on, and real-world science and engineering activities and networking opportunities with STEM professionals, NHAS helps students build their occupational identity and a future STEM workforce.

NHAS offers financial supports to ensure its programs are accessible to all students. NHAS provides financial aid to students whose family household income is below 400% of the federal poverty level,[156] and, if qualified under federal financial guidelines, pays students for their research.[157] These financial supports can have a significant impact on students who might otherwise not have the financial means to participate. The NHAS programs are supported by peer-reviewed federal grants from the National Institutes of Health and the National Science Foundation, and not by the Learn Everywhere program.

Leaders of approved programs remain excited about the opportunities they make available to New Hampshire's students ... By exposing students to advanced, hands-on, and real-world science and engineering activities and networking opportunities with STEM professionals, NHAS helps students build their occupational identity and a future STEM workforce.

Theme 6

A cohort model and partnerships with outside organizations provide the support and technical assistance districts need to innovate.

Innovating in the education system is hard work. District leaders note two primary structures that provide the support they need: being part of a cohort of districts within their state doing similar work, and partnering with outside organizations that provide additional tools, resources, and ideas.

Four of the seven states profiled — Colorado, Kentucky, Utah, and Washington — used a cohort model to provide support to districts participating in their respective innovation programs. This model enables participating districts to come together to network, share learnings, and brainstorm solutions to challenges: "With the cohort model, all the districts are working on different things. … The cohort creates space for sharing, networking, and seeding new ideas," says Travis Hamby, superintendent of Allen County Public Schools in Kentucky.[158]

In five states — Colorado, Kentucky, North Dakota, Utah, and Washington — partnerships with outside entities are built into the design of the innovation program. Partner organizations tend to be nonprofits that have a long track record of working with districts to advance student-centered learning. These external partners provide a variety of supports to districts, including technical assistance, thought partnership, and professional development. North Dakota's Northern Cass School District, for example, partnered with Transcend to provide professional development to help their teachers transition to a competency-based learning model.[159]

Grantees in Colorado's local accountability system initiative each work with an accountability system partner.[160] The Cañon City School District is partnered with the University of Colorado – Boulder's Center for Assessment, Design, Research, and Evaluation (CADRE). CADRE evaluated the district's assessment design, provided constructive feedback to help improve, and studied the district's data. Adam Hartman, Cañon City School District superintendent, explains the value of this partnership: "It's been amazing. I don't have the time to look at all of the measures and indicators, and don't know how to do the kind of stuff university folks can do on assessment measures and looking at issues around validity."[161]

Districts need support if they are going to be successful in pursuing innovative initiatives. While states themselves could provide technical assistance, staff in state education agencies may not have the capacity or expertise needed. Connecting districts with outside partners is often a better solution for both the state and the district.

WASHINGTON

Piloting and scaling mastery-based learning.

Challenge

Since the early 2000s, Washington state policymakers have been working to adopt policies that provide districts with more flexibility to innovate and to align the state's high school graduation requirements with the requirements of the state's institutions of higher education. However, few districts were leveraging these policies to their full potential.[162]

Policy Design

In 2019 the Washington State Legislature, through House Bill 1599, created the MBL Work Group. The goals of this work group were to identify obstacles to MBL and increase students' access to mastery-based pathways that are aligned to their postsecondary and career goals.[163] The work group also created a statewide profile of a graduate.[164] In spring 2021, the legislature passed Senate Bill 5249 to begin implementing the recommendations of its MBL Work Group, which included the expansion of mastery-based credits to meet graduation requirements and extending the MBL Work Group to develop a state Profile of a Graduate ("the Profile"). The bill also tasked the Washington State Board of Education with reviewing the Profile and allowed the board to provide recommendations to align graduation requirements with the Profile.[165]

In addition to the working group initiated by the legislature, the state board of education created the MBLC.[166] The MBLC is a cohort of schools and districts that have received grants to implement culturally responsive MBL to inform future mastery-based learning policy.[167] The first cohort began its planning work in spring 2022.[168]

Policy Implementation

Both Tumwater and Northshore School districts are part of the first cohort of the MBLC. This group's planning work began in spring 2022; all participating districts are currently in their first year of professional learning.[169]

Prior to becoming part of the MBLC, leaders in the Tumwater School District had been working on two initiatives: enhancing diversity, equity, and inclusion (DEI) in the district and leveraging data to increase students' postsecondary readiness.[170] The MBLC provided an opportunity for financial resources, a structure, and a comprehensive plan to use MBL to achieve these goals. This district's MBL plan includes adopting a culturally responsive and sustaining MBL curriculum that integrates the essential standards of core academic subjects with lessons that are relevant and engaging and connect learning to the students' world.[171]

Professional development is an essential component of the district's MBL plan, as many of its educators had to undergo a "paradigm shift" as they learned the ins and outs of MBL.[172] As Brian Hardcastle, CTE director and K-12 STEM supervisor, says, "We had to build capacity for the district leadership team, but also for our building administrators and teacher leaders. The reality is every stakeholder has a role in the work and the professional learning. No matter what your position is, a foundational understanding of the MBL principles is needed to establish a philosophical and pedagogical foundation for the work."[173]

To support educators with this paradigm shift, the district developed a professional lesson plan to include coaching, convenings, travel to MBL conferences, and book studies. In addition to the support the district receives through the MBLC, district leaders credit two external partners — Great School Partners and Solution Tree — with helping teachers make the shifts necessary to embrace an MBL approach.[174]

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Piloting and scaling mastery-based learning.

The Northshore School District established Innovation Lab High School in 2020 with MBL as its mission and an expeditionary learning model at its core.[175] As the name suggests, the school is designed to be an incubator of innovative learning ideas. Peter Schurke, Innovation Lab High School's principal, explains: "We are operating as an innovation lab for the district. We are working to identify promising practices, try them out, and figure out if they will scale. If so, we will be able to hand them off to the rest of the schools in the district."[176]

The school is implementing several innovative approaches that support MBL. For example, it is one of 13 schools in Washington that are part of the Mastery Transcript Consortium, which supports member schools to co-create "uniquely flexible and scalable learning records to solve the challenge of credentialing."[177] Students work on select competencies that are part of their transcript, earn credits as they demonstrate mastery, upload evidence, and can submit their transcript to college and universities. In addition, the school uses a "crew" model, where students are part of a cohort of students that stays together, with the same teacher, throughout their four years of high school. The students meet daily for a full period to build community and trust, and to work on their mastery transcript competencies.

One early challenge the school identified through its implementation of MBL is the need for a new way to report student mastery of knowledge and skills. The state's grading policy requires traditional letter grades, while MBL typically leverages a scale of mastery.[178] Innovation Lab High School has created a scale to translate its MBL rubrics to letter grades to meet current state requirements while also surfacing the challenges and supporting the MBLC to think through recommended changes to state policy.[179]

> **"[Tumwater School District] had to build capacity for the district leadership team, but also for our building administrators and teacher leaders. The reality is every stakeholder has a role in the work and the professional learning. No matter what your position is, a foundational understanding of the MBL principles is needed to establish a philosophical and pedagogical foundation for the work.**
>
> —BRIAN HARDCASTLE, CTE DIRECTOR AND K-12 STEM SUPERVISOR

Theme 7

A culture open to change, an early champion, and political backing are necessary conditions for district-level innovation.

In conversations with state and district leaders, three conditions kept resurfacing as necessary precursors to successful innovation. First, many of the district leaders we spoke with pointed to a culture of growth, change, and innovation that existed prior to any formal state policy or program aimed at catalyzing innovation. This preexisting culture was critical, as it lessened the degree of mindset-changing that needed to happen for districts to be able to embrace a new innovation policy. Allen County Public Schools District in Kentucky, for example, had already established a culture of professional learning and growth. Leaders were able to leverage existing processes, such as peer learning and feedback exercises, to bring teachers along.[180]

In Utah's Ogden School District, a vision for personalized learning existed well before the state launched its competency-based learning grant program. The district had long been working to create personalized learning pathways for its students. The introduction of the state's grant program propelled that work forward, providing additional resources to address existing challenges and take the work even further. As Hillary Stacey, Ogden's personalized competency-based learning specialist, reflects, "We had a lot of teachers who were excited and ready, but we needed additional supports in place to help us kickstart initiatives. So, we had the mindset and the foundation, we needed something to take us to that next level."[181] In Jefferson County, Kentucky, the district's previous work to create the Academies of Louisville — a set of career pathway-focused high schools — laid the foundation for its current efforts to create personalized pathways and a more comprehensive assessment system as part of the state's L3 Initiative.[182]

Second, districts' innovation efforts need a champion. In North Dakota, Northern Cass School District Superintendent Cory Steiner is a fierce champion for his vision of flexible, personalized, student-centered learning. Even amid missteps, Steiner continues advocating because he believes it is what's right for kids. He explains, "We want to be uncompromisingly learner- and community-centered. When we're wrong, we say we're sorry. When we're right, we say, 'Look what that did for our kids.'"[183]

In Colorado, Cañon City School District Superintendent Adam Hartman began laying the groundwork for his vision of what was possible in the district back in 2010 when he participated in a working group charged with strategizing what learning in the district could look like by 2020. When he assumed his current role as superintendent, he had the tools, experience, and longevity to be a true champion of the work.[184]

Finally, district leaders pointed to the importance of the political backing provided by both their local boards of education and the state departments of education. Having the support from these entities helped leaders move forward if they ran into any challenges. In Utah's Juab School District, Assistant Superintendent Royd Darrington has been an administrator in the state for over 20 years. This longevity afforded him the trust of state and local leaders to engage in this innovative work. He explains, "I was already well recognized for things I had done in my career. I had some political air cover just because of my body of work."[185]

In North Dakota, Northern Cass Superintendent Steiner reflects on the critical support the state department of education provides: "I don't know that there's anything you couldn't try in our state that wouldn't be approved. ... We say, 'We want to try this' and they say, 'Give us a couple of days, we'll put our heads around it and we'll figure it out.' And they will. When we want to do major things here, we can call the Department of Public Instruction and say, 'Can you come meet with us? Can we come to Bismarck and sit down with you and talk through this together?' I don't think a lot of states have that where you're trying to change a system and you're sitting down with your Department of Public Instruction at the table."[186]

Theme 8

Efforts to incentivize innovation often happen in silos within the education sector, but truly innovative and transformational approaches require multiple players at the table.

Too often education innovation happens in silos, with limited understanding of or visibility into what impact the change may have elsewhere. Many of the states profiled here have taken deliberate steps to ensure that a broad representation of stakeholders is at the proverbial table when policies are passed and innovations are implemented. Utah's portrait of a graduate, for example, was developed by a taskforce of the members and staff of the Utah State Board of Education but informed by surveys and focus groups that included legislators, parents, educators, and industry leaders.[187] Washington's MBL policy recommendations stemmed from the working group created by its legislature that was led by the state board of education and included students, teachers, school and district leaders, school counselors, state leaders, and representatives from institutions of higher education.[188]

Kentucky requires districts participating in the L3 Initiative to have an advisory group that is composed of diverse stakeholders, including experts and individuals who worked with families from systemically disenfranchised communities.[189] Kentucky districts, like Jefferson County Public Schools, leveraged the advisory group to receive input into what challenges existed in the district and what needed to happen moving forward.[190]

Even with these efforts, perspectives are left out. We heard little about engaging the social services sector, for example, to ensure that the needs of students who are homeless or in foster care are included. The juvenile justice system is rarely at the table, meaning the needs of incarcerated young people are likely overlooked. While it's an unattainable goal to include every perspective in the policy design process, state policymakers and district leaders must continue to broaden the scope of who is included as policies are passed and programs are designed.

Recommendations to Support and Catalyze District Innovation

While much of the day-to-day work of innovation happens locally, by and with key stakeholders including parents, teachers, and community members, states have an important role to play in creating the conditions necessary for districts to engage in the process of innovation. States can incentivize, fund, support, connect, and inspire. District leaders have a critical role to play as well. As experts in both education and in their unique local communities, district leaders are poised to be the bridge between state policy and local needs. Finally, the philanthropic community has a role in supporting districts as they do this important work.

Recommendations for State Policymakers

Engage local communities in the design of policies.

Local stakeholders, including students, families, teachers, school leaders, and community members, know their communities best. They understand the challenges they face and know the kinds of solutions that will work best. As such, state policymakers must ensure members of local communities are part of policy design conversations from the beginning, and that new policies and regulations reflect the needs surfacing "from the ground."

Allow for locally driven variations in design and implementation within a clearly articulated and communicated framework of "what success looks like."

As state leaders create innovation policies and programs, they must cast and communicate a clear vision for success so that all stakeholders — district and school leaders, students, families, and community members — understand the goal of the policy. Whether the goal is for all districts to move toward a competency-based system or is more open-ended, all parties must understand what success looks like. Importantly, however, while "success" must be clearly defined, innovation policies cannot be one-size-fits-all. Individual communities have unique needs, values, and circumstances, and policymakers must design policies that are flexible enough to account for different initiatives and outcomes across communities. Casting a clear vision at the outset can help ensure that, despite different means, districts are all moving toward the same goal.

Provide funding and support structures (e.g., cohorts, partnerships with outside entities) to enable districts to take advantage of innovation policies.

An innovation policy or program alone is unlikely to be sufficient incentive for district leaders to engage in the complex work of innovation — they need the funding, human capital support, and technical assistance to make real, sustained change over the long term. State leaders ought to embed supports, such as district cohorts or partnerships with outside entities, into the design of the policy to ensure districts have what they need to succeed.

Tolerate small-scale risk and be open to the possibility of failure.

There is no innovation without risk, and the success of innovative approaches to teaching and learning is far from guaranteed. Policymakers interested in catalyzing innovation must be tolerant of risk and open to the

possibility of failure. Starting small, through pilot programs, is one way state leaders can mitigate risk. Pilot programs create an opportunity to incubate and refine ideas in a small number of districts, continuously learn and improve, and use this process to inform efforts to scale successful ideas throughout the state.

Provide district leaders with examples of where flexibility already exists in state law — for example, existing seat time waiver processes or alternative graduation pathways.

Many state leaders we spoke with described examples of districts using newly created innovation programs to request flexibility that already existed in state law. This suggests that in many places, districts need not wait for the state to create an innovation-specific policy or program and could use existing flexibility to begin innovating. State leaders can help district leaders understand what flexibility already exists in state law. States could offer professional development opportunities, compile and share examples of districts using existing flexibilities, or work with a third-party organization to analyze state law and identify and communicate existing opportunities.

Recommendations for District Leaders

Examine current state policies — in particular, seat time, graduation requirements, and assessment and accountability structures — to identify existing flexibilities and opportunities to innovate.

As noted above, flexibility in state law often exists that can enable district leaders to innovate, even in the absence of innovation-specific policies or programs. All 50 states and Washington, D.C., for example, have some degree of seat time flexibility,[191] which can allow districts to explore mastery-based crediting on their own. District leaders ought to understand the full range of what's allowed under existing state laws and regulations.

Engage teachers, families, and community members in creating a vision and in identifying what innovations are needed to achieve that vision.

When district leaders decide to undertake the complex work of innovation, they must co-create a vision and process with the community to ensure they have a clear understanding of the problem(s) they are seeking to solve and that they obtain the support they need to work through challenges as they arise and sustain change well into the future.

Create and maintain a cycle of continuous improvement.

Innovation is complex, long-term work that can run into myriad challenges: funding and resources can run out, leadership can change, new information can surface, and different problems can arise that sidetrack the work. As district leaders cast a vision and design an innovation process alongside the community, they ought to embed into that process a strong feedback loop and continuous improvement cycle so that they can course-correct in real time to address challenges as they arise.

Recommendations for Funders

Convene policymakers, state and district leaders, and practitioners from various sectors of education (K-12, postsecondary, early childhood, etc.).

One of the most powerful levers at funders' disposal is the ability to convene stakeholders across sectors. Through working groups or conferences, funders can support structured opportunities for education stakeholders to come together across sectors to share challenges, brainstorm ideas, identify lessons learned, and chart a path forward for the education system in a community or state.

Fund nonprofit organizations to support districts' innovative initiatives.

School districts cannot do the complex work of innovation alone. States often lack the capacity (financial, technical, human, etc.) to provide the robust, in-depth support that districts need. Outside organizations can fill this gap, and funders can provide the critical support necessary for districts to contract with organizations on this important work.

Support state and district pilot initiatives.

While some of the challenges inherent in within-system innovation may make it a less appealing investment for the philanthropic community (for example, district bureaucracy or high rates of leadership turnover), the potential for impact is immense. The vast majority of young people are educated through the public education system; therefore, supporting state and district efforts to test and refine innovative ideas through small pilots that are ultimately scaled has the potential to impact millions of students. These pilots can serve as the proof points that state leaders need to invest in larger-scale efforts to support innovation.

Support district leaders in analyzing current state law to identify existing flexibilities and opportunities to innovate.

As noted above, we heard from many state leaders that too often, districts are not taking advantage of flexibilities that exist outside of innovation-specific policies or programs. While the state has a role to play in ensuring district leaders understand the contours of that state's education laws and regulations, and district leaders can take it upon themselves to understand what flexibilities exist, funders can also support this work to inform leaders of existing opportunities. This could be especially powerful in states that lack the political appetite for creating innovation policies.

Conclusion

The U.S. public K-12 school system is ripe for innovation, and state policymakers and education leaders are poised to catalyze districts' efforts and support them as they design and implement new approaches and ideas.

States can provide funding and other resources; create new programs; waive policies, laws, and regulations; bring in outside experts; and create a policy ecosystem that gives districts the flexibility they need to be responsive to their communities and creative in their approaches.

Ultimately, states can and should be at the forefront of creating an education sector that prizes new approaches to old problems and prioritizes change and evolution.✦

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About Bellwether

Bellwether is a national nonprofit that exists to transform education to ensure systemically marginalized young people achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we work hand in hand with education leaders and organizations to accelerate their impact, inform and influence policy and program design, and share what we learn along the way. For more, visit **bellwether.org**.

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