EDUCATION INNOVATION PARTNERS:

A NEW VISION.
A NEW FUTURE.
A NEW ERA IN EDUCATION FOR NORTHEASTERN MINNESOTA.

March 2013

Glumac Executive Enterprise and Relata
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EXECUTIVE SUMMARY

BACKGROUND:

Northeastern Minnesota has a proud tradition of investing in education to prepare children for a successful future. Early immigrants in the late 1800s and early 1900s sacrificed to invest in education so their children could take advantage of opportunities to make a better life in the 20th Century.

More than 100 years later, leaders in the region remain committed to this proud tradition of investing in education to provide children with the tools they need to make a life and a living in the 21st Century. However, today’s educational leaders face some daunting challenges:

- **Enrollment Declines:** From 1989 to 2012, enrollment in regional school districts has plummeted from about 34,100 students to about 16,700 students—a drop of more than 50% in 23 years and the equivalent of about $140 million in today’s state aid.

- **Unequal Access:** Not every student in the region has equal access to educational opportunities. Some are in classes too large for teachers to provide the kind of individual attention to each student they would like to provide. Others cannot access critical electives because their school district can’t afford to offer classes like calculus and other courses. Still others find their schools cannot provide access to even basic technology in what is fast becoming a digital world.

- **Changing Culture:** Educators find they are teaching more students and more children with a variety of special needs. More children are growing up in single-parent homes. Income disparities between the haves and have-nots are growing, and the impact is felt in the classroom.

- **Growing Expectations:** In the midst of these challenges, society expects more and more of the education system. Parents expect children to have access to a broad curriculum that incorporates technology. Students expect to transition smoothly from high school to post-secondary school, without taking remedial classes. Employers expect workers to have core knowledge and 21st Century skills. Future employment trends demand that 70% of workers in Minnesota have a post-secondary education.

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From 1989 to 2012, enrollment has plummeted from about 34,100 students to about 16,700 students—a drop of more than 50%
EDUCATION INNOVATION PARTNERS:

In the midst of these and other challenges, regional education leaders joined forces in 2010 to determine how best to provide equal access to educational opportunities for all learners in the region. They looked at the success of the Applied Learning Institute, which was created in 2006 to help school districts and community colleges in Northeastern Minnesota work cooperatively to enhance technical education through experiential learning that combines hands-on training with technology.

Building upon the strong foundation of the Applied Learning Institute, 17 school districts, the Northeast Higher Education District and its five community college campuses formed Education Innovation Partners in 2011.

Education Innovation Partners issued the following Call to Action in May 2011:

We call upon the educational and community leaders of Northeast Minnesota in partnership to embark on an immediate undertaking to proactively build a homegrown integrated learning system that provides the 21st century education deserved by the youth and adult learners of this region.

The Blandin Foundation and the Iron Range Resources and Rehabilitation Board answered the call to action. Ultimately, Education Innovation Partners identified three initiatives to begin implementing this Regional, Integrated Learning Model:

- Teaching, Learning and Leadership Academy
- Personalized or Individual Learning
- Regional Technology Plan

This report is a roadmap – a detailed set of recommendations for implementing in an integrated manner the first three initiatives EIP identified, including expense estimates, step-by-step recommendations and timelines and the research and data to support the recommendations.

VISION: REGIONAL, INTEGRATED LEARNING MODEL

Through the leadership and vision of the educational leaders of EIP, Northeastern Minnesota will become known for educational innovation and student achievement, with families choosing to raise their children in the districts and companies seeking to locate in the region because of the high quality workforce the educational system will provide.
Through a region-wide commitment to personalized learning pedagogy and instruction, professional learning and leadership—and the technology to support these initiatives—students will have more opportunities to direct their learning.

All learners in Northeastern Minnesota will have equal access to a high quality education, regardless of which school or campus they attend. They will have the technology and resources to access a variety of courses and content within and outside their school or campus, explore the world via the Internet anywhere, anytime, and demonstrate their knowledge in multi-media formats.

Students will be engaged in and help direct their own learning and pursue topics of interest to them. They will utilize 21st Century Skills such as collaboration, communication, critical thinking and problem solving.

Educators will be comfortable using technology to maximize learning and customizing to groups of students or individual students. They will be encouraged to explore and incorporate technology within the classroom.

School districts will have the broadband and infrastructure needed to support high-speed, consistent connectivity. With a common platform, districts will be able to share staff resources and benefit from cost savings.

EIP school districts will graduate more students sufficiently prepared to enter post-secondary education and/or a career of their choice. The learning experience will be engaging, relevant and personalized, using technology to maximize every student’s potential.

Colleges will spend less time on remediation because students will be properly prepared, and students will graduate from their programs ready to enter the workforce. Employers will have workers who are prepared to meet the demands of the 21st century workforce. Northeastern Minnesota will be known for its continued commitment to education innovation and having a highly skilled and prepared workforce.

The Teaching, Learning and Leadership Academy will celebrate and promote teaching excellence and educational leadership throughout the region, enriching and supporting teachers and administrators at all levels and creating a broad and diverse community of educators engaged in sustaining each other and implementing best practices – ultimately leading to greater student achievement regionwide.
**METHODOLOGY:**

The project management advisors hired to develop the roadmap, budget estimates and recommendations also were charged with soliciting and incorporating stakeholder input to inform development of the plans.

In all, more than **1,400 stakeholders** contributed ideas, opinions, hopes and concerns about the Regional, Integrated Learning Model and the first three initiatives.

The report and recommendations were informed by stakeholder input received via:

- **One-on-one interviews:** In-depth conversations with 22 educational leaders in the region.
- **Online surveys:** Parents, PreK-12 educators, principals, and higher education faculty participated in unique surveys. More than 1,300 stakeholders responded.
- **Focus groups:** Project management advisors conducted 10, two-hour focus groups in three separate communities. More than 75 students, educators and community members participated in the 20 hours of focus groups.

Extensive research also offered a glimpse at educational best practices found in the U.S. and elsewhere, as well as more detailed information about specific initiatives. Field research provided data and insights that informed the recommendations. Finally, several meetings with the EIP Cabinet and EIP Leadership Council offered immediate feedback on proposed processes, etc.
SUMMARY OF RECOMMENDATIONS

EIP Organizational Foundation

1. Begin an ongoing dialogue to share information about the Regional, Integrated Learning Model and the three initiatives.
2. Hire an Administrator to oversee and participate in implementation of the three initiatives.
3. Establish a governance and organizational structure, including:
   - Interim Cabinet
   - EIP membership
   - Dues of $10,000 per school district, community college
   - Meeting schedule
   - Decision-making
   - Elections for Cabinet
4. Form EIP as a nonprofit corporation.
5. Adopt an annual work plan.
6. Based on the annual work plan, consider whether to hire another staff person.
7. Find sufficient office space – ultimately in the same location as the Teaching, Learning and Leadership Academy.
8. Create and implement a development plan to secure funding from multiple partners.

Teaching, Learning and Leadership Academy

1. Create an Academy Steering Committee
2. Develop a financing model that provides equal opportunity for all educators and an equal expectation that all districts will contribute.
3. Determine whether educators will receive a stipend for attending some/all professional development.
4. Survey educators and administrators to identify most immediate training needs.
5. Create an online plan to identify educators’ professional development goals.
6. Develop partnerships with organizations to deliver high-quality training.
7. Create annual course catalog.
8. Provide various professional learning formats.
9. Collect evaluations as to usefulness and effectiveness.
10. Ensure participants have time to reflect on application.
11. Create a transcript of courses taken for license renewal and for determining lane (or educational credit-based) salary increases.
12. Develop a formal mentoring program for new teachers.
13. House the Academy in a centrally located facility with space for training and with infrastructure necessary to support extensive use of technology.
14. Highlight and showcase the use of technology in learning.
Personalized Learning

1. Use “Personalized Learning” for the initiative and “Personal Learning Plan” for the tool.
2. Establish a regional Personalized Learning Steering Committee.
3. Provide ongoing professional development related specifically to personalized learning.
4. Ensure Personal Learning Plans are electronic, are K-14; contain components to increase student engagement and achievement, and provide educators with meaningful data to assess and assist students in real time.
5. Review and provide a recommendation for a region-wide software system for Personal Learning Plans.
6. Develop a tiered approach for determining responsibility and accountability and implementing regional Personal Learning Plans using best practices data.
7. Identify potential measures of success and a plan for assessing and modifying, if necessary.

Regional Technology Plan

1. Hire a regional technology manager.
2. Establish a Regional Technology Steering Committee to guide assessment and implementation.
3. Determine long-term solution for broadband connectivity across all EIP districts.
4. Ensure all districts have the infrastructure to provide consistent, continuous access for multiple devices running simultaneously.
5. Develop a plan for maximizing teaching and learning with technology in the classroom and determine core technology competencies for students.
6. Provide a recommendation on personal learning devices.
7. Provide a recommendation on distance learning and collaboration technology.
8. Provide recommendations on professional development to support implementation of 1:1 devices and teaching with technology.
9. Identify potential measures of success and a plan for assessing and modifying, if necessary.

Next Steps

The full report provides greater detail on the recommendations above, including a detailed roadmap for each initiative and for creating a permanent organization to implement the whole model, as well as cost placeholders for each.

Education Innovation Partners will determine future implementation steps and timelines.
I. **Education Innovation Partners: The History**

In order to understand the impetus driving Education Innovation Partners, one must look back more than a year or two; one must look back more than 100 years, when immigrants from dozens of countries were streaming to the area in search of a better life for themselves and their families in the woods and mines of Northeastern Minnesota.

As first temporary mining locations at the lip of a mine and later permanent towns grew, immigrants populating these new communities realized that a better life for their children – a life that gave them a choice of occupations and made them mobile in this new society – required an education, an education not in the language of their homelands but in the common language of the new world.

The immigrant great-grandparents and great-great-grandparents of today’s students understood that education would help their children realize the dream of a better life. They directed their elected school board members to make significant investments of property taxes and income from the mining companies in an education system and infrastructure that would prepare their children to thrive in the 20th Century.

The schools they built were among the best in the country.

Hibbing High School, for example, built in 1923 for $4 million was filled with marble, chandeliers, architectural details and a 1,800-seat auditorium modeled after one in New York. Virginia’s high school and technical building had swimming pools. By the 1940s, junior colleges existed in Ely, Virginia, Eveleth, Hibbing, Grand Rapids and Crosby.

By the 1960s, the population of the area was about 127,000.

However, the fortunes of Northeastern Minnesota with its natural resource-based economy are quick to register changes in the national economy. The national economic recession of the early 1980s had a particularly devastating impact in the region. A University of Minnesota report suggested that 10,000 people lost their jobs; an estimated 31 people per day left St. Louis, Lake and Itasca counties every day from 1981-1984.¹

Among those leaving Northeastern Minnesota were schoolchildren—and the drop in enrollments has continued unabated.

In the 1989-1990 school year, there were approximately 34,100 students enrolled in the

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region. By 2001-2002, the number had dropped to 21,600. Today’s enrollment of about 16,700 students is less than half what it was just a couple of decades earlier.

SITUATION ANALYSIS

Today, educational leaders throughout the region face several, significant challenges as they work to prepare students for the better life all parents want for their children.

The grinding impact of declining enrollments has had a significant effect on the resources available to educate children. If regional schools today were serving the same number of children as were enrolled 23 years ago, they’d have approximately $140 million more in annual state education funding to compensate teachers, update technology and maintain infrastructure.²

In addition to having fewer financial resources, children, families, educational leaders, and communities also have had to manage school closures and consolidations made necessary by shrinking enrollments.

While consolidations have helped conserve financial resources, operating fewer schools hasn’t assured equal access to educational opportunities throughout the region; many schools struggle to provide critical electives or get by with class sizes too large to allow teachers to devote the attention they would like to individual students. Technology, for some, is a pipe dream.

These educational challenges exist in a societal context that offers its own challenges—fewer two-parent families, more children with special needs, growing income disparity.

Meanwhile, locally and nationwide, expectations of education are growing. In addition to core subjects like science, math, language arts, history and social science, schools are expected to provide children with 21st Century Skills necessary for the jobs of the future:

- Critical thinking and problem solving
- Communication
- Collaboration
- Creativity and innovation
- Information, media and technology skills
- Life and career skills, such as flexibility and adaptability
- Initiative and self-direction
- Social and cross-cultural skills
- Productivity and accountability
- Leadership and responsibility

² The net loss of students from the 1989-90 school year to the 2011-2012 school year is approximately 17,400 students. Multiplying that number by the current average per pupil unit in state aid of $8,000 yields $139,200,000.
What’s more, today’s high schools are expected to graduate students who will be prepared to be successful in post-secondary institutions. A 2010 study by Georgetown University stated that by 2018, 70% of all job openings in Minnesota will require a post-secondary education.³

In particular, the expectations of current and future employers in the region also must be considered. A recent state survey pointed out skills gaps in the region:

- Employers find it difficult to find employees with qualifications to hit the ground running. About 75% of employers in the region reported a serious to moderate shortage of skilled production workers, scientists and engineers in 2011, and 45% anticipated a severe to moderate shortage of skilled workers in the next three years.⁴
- Employers in the survey cited above anticipated that skill areas where employees will need more training in the next three years were: Computer skills (44%), Basic Employability (41%), and Math (38%).

THE DAWN OF EDUCATION INNOVATION PARTNERS

In the midst of these challenges, educational leaders met in 2010 and began a conversation – a conversation about leveraging the assets of the entire region to create a new model for providing PreK-16 education via a Regional, Integrated Learning Model.

Building upon the success of the Applied Learning Institute, 17 school districts and five community college campuses met for nearly a year to map out how to build this regional, integrated system. In addition to leadership from the Northeast Higher Education District and its five campuses – Vermilion, Rainy River, Mesaba, Hibbing and Itasca – school district leaders from the following schools also participated:

- Chisholm
- Deer River
- Ely
- Eveleth-Gilbert
- Floodwood
- Grand Rapids-Big Fork
- Greenway
- Hibbing
- Hill City
- International Falls

³ Carnevale, Anthony P.; Smith, Nicole, and Strohl, Jeff. Center on Education and the Workforce, Georgetown University, (June 2010), Help Wanted: Projection of Jobs and Education Requirements through 2018.
⁴ Minnesota Department of Employment and Economic Development. (2011) 2011 Skills Gap Survey Results by Minnesota Planning Region
Lake Superior  
Mesabi East  
Mt. Iron-Buhl  
Nashwauk-Keewatin  
Northland Community Schools  
St. Louis County Schools  
Virginia

The group chose the name Education Innovation Partners and issued the following Call to Action in May 2011:

*We call upon the educational and community leaders of Northeast Minnesota in partnership to embark on an immediate undertaking to proactively build a homegrown integrated learning system that provides the 21st century education deserved by the youth and adult learners of this region.*

Education Innovation Partners, in collaboration with the Blandin Foundation and the Iron Range Resources and Rehabilitation Board, met several more times before identifying the first three initiatives to begin realizing the dream of a Regional, Integrated Learning Model:

- Teaching, Learning and Leadership Academy  
- Personalized or Individual Learning  
- Regional Technology Plan

Project management advisors were hired in November 2012 to begin the process of reaching out to stakeholders and gathering input to shape roadmaps to implement these three, intertwined initiatives. The bulk of this report contains the recommendations, roadmaps and supporting data to start building the Regional, Integrated Learning Model.

**RENEWING THE CALL TO ACTION**

The immigrants who settled this region in the late 1800s and early 1900s came from dozens of countries but they shared a common goal: They wanted high quality schools that could prepare their children to make a life and a living in the 20th Century. Our grandparents and great-grandparents and great-great-grandparents invested in the future by investing in their children.

Now, it’s our turn to make the investment. It’s our turn to seize this opportunity to capitalize on the passion of education and other leaders throughout the region to invest our passion, our talents and our resources in a new, region-wide vision for learning in the 21st Century – a vision driven by innovation, collaboration, high expectations and hope.
It’s our turn to ask educators, community leaders, businesses, parents and children to share their hopes and their dreams and to infuse this regional, integrated learning system with those dreams.

It’s time for us to usher in a new era in education for Northeastern Minnesota.

Education Innovation Partners is committed to re-inventing the education system to serve the needs of learners of all ages, throughout the region.
II. A STRONG FOUNDATION FOR THE REGIONAL, INTEGRATED LEARNING MODEL

VISION

Championed by educational leaders throughout the region, Education Innovation Partners (EIP) will become a nimble, collaborative, permanent organization that ensures ongoing development, implementation and sustainability of the Regional, Integrated Learning Model – soliciting and incorporating input from member districts and campuses, providing oversight for implementation of initiatives, and maintaining the momentum of the model.

Sustained by its diverse membership, EIP will identify opportunities to continue to develop the model, ensuring ongoing efforts to provide equal access to educational opportunities, increase learner achievement and create unlimited opportunities for all learners in the region, including educators.

Through the leadership and vision of the educational leaders of EIP, Northeastern Minnesota will become known for educational innovation and student achievement, with families choosing to raise their children in the districts and companies seeking to locate in the region because of the high quality workforce the educational system will provide.

DEFINITION

EIP will evolve into a permanent, nonprofit organization whose major areas of focus to achieve positive learner outcomes throughout the region will include:

- Implementing the three initiatives of the Regional, Integrated Learning Model: a Teaching, Learning and Leadership Academy, Personalized Learning, and a Regional Technology Plan;
- Identifying, planning and implementing additional initiatives necessary to achieve its goals;
- Soliciting funding from a variety of sources to finance its initiatives, and
- Ensuring the sustainability of the gains achieved from the Model and its initiatives.

To provide the organizational foundation to carry out its work, the EIP will develop a governing Cabinet, determine what constitutes membership, membership support and
how they are sustained, and create a permanent operating structure to ensure the day-to-day implementation of the Regional, Integrated Learning Model.

EIP membership will include but not be limited to the 17 school districts in the region and the five campuses of the Northeast Higher Education District, and consideration will be given to including other associate or partnering members.

**Situation Analysis**

Since its inception in 2010, EIP has functioned as a “coalition of the willing” without a formal structure and with limited, donated staff support from two collaborating organizations, the Iron Range Resources and Rehabilitation Board (IRRRB) and the Northeast Higher Education District.

This level of organization was appropriate for the tasks at hand – coalescing around a Regional, Integrated Learning Model, identifying the model’s first three initiatives and hiring project management advisors to convene and facilitate regional conversations and create a roadmap for moving forward, with initial funding provided by IRRRB and the Blandin Foundation.

However, implementation of the initiatives requires a more robust, enduring organization that is championed, first and foremost, by the school districts and campuses it serves. This permanent organization is necessary to oversee and support the implementation steps required and withstand inevitable changes in leadership that will occur within the districts, campuses and other partnering organizations over time.

In addition to financial support from the members, EIP will be more likely to secure contributions from external funding sources if there is an organizational structure in place to ensure accountability for funds, and members themselves have invested in the organization.

**Desired Outcomes**

A permanent organizational structure for the EIP will:

- Maximize educational leaders’ ownership of the organization, the Regional, Integrated Learning Model and its intended results
- Ensure continuity of support for the Model through leadership changes in districts, campuses and other organizations.

*EIP will be more likely to secure contributions from external funding sources if there is an organizational structure in place to ensure accountability for funds, and members themselves have invested in the organization.*
- Create a structure for ongoing review of the Model, including adding new initiatives.
- Create the opportunity to participate in other opportunities that require a regionwide approach while allowing districts and campuses to maintain individual identities.
- Provide the structure and resources to hire staff and consultants to implement the Model according to EIP specifications.
- Make it easier to measure the performance of initiatives and create a structure for incorporating the input of stakeholders into the assessment of existing initiatives and the development of new ones.
- Make it easier to attract external funding for initiatives.

RECOMMENDATIONS

1. **Begin an ongoing dialogue with internal and appropriate external audiences to immediately and consistently share information about the Regional, Integrated Learning Model and the three initiatives—including the “whys” for each—and the roadmaps.**

   *Rationale:* The success of the Regional, Integrated Learning Model is dependent upon the ongoing support of everyone involved in the educational system—educators at all levels, administrators, school board members, parents and the community at large. Educators must not only buy into the Model but also must “own it” and be passionate about its success.

   Stakeholder communication, including surveys and focus groups, has raised some awareness and a number of questions about the three initiatives and the Model. Once EIP has agreed upon a course of action, EIP members—particularly superintendents and provosts—must inform their key stakeholders about the recommendations and next steps.

   In addition, there should be consistent, regular updates about progress on the initiatives, how they will affect individual districts and campuses, etc. through all communication channels that exist within the member organizations.

2. **Hire an Administrator to oversee and participate in implementation of the three initiatives, to help EIP create its governance and organizational structure and to help EIP organize as a non-profit.**

   *Rationale:* The volume, scope and timing of the myriad implementation steps in the roadmaps required to realize each of the three initiatives in the Regional, Integrated Learning Model demand daily attention to schedules, budgets, stakeholder engagement, contracts and other details that will require at least one professional staff person.
3. Establish a governance and organizational structure.

*Rationale:* A well-thought-out governance structure offers clarity and transparency to internal and external stakeholders, members, partnering organizations, potential funders and stakeholders. Establishing it quickly will allow the EIP to focus most of its energies on implementation of the Model.

3. a. Determine the most efficient and effective way of creating the first, interim Cabinet to provide immediate leadership to the EIP for the *first two years*. Some options include:

- Nominations and election by the current EIP Leadership Council members (17 school districts and five community college campuses) for a two-year term in an election process to be held immediately, keeping in mind the demographic suggestions in 3.b.
- Appointment by members of the current EIP Cabinet, keeping in mind the demographic suggestions in 3.b.
- Appointment by major funders, such as the Iron Range Resources and Rehabilitation board, keeping in mind the demographic suggestions in 3.b.

*Rationale:* Moving quickly to establish an interim Cabinet will allow the organization to plan for a more permanent structure, without delaying implementation of the initiatives. The interim Cabinet also will ensure that the EIP is accountable to members and funding partners for financial resources contributed to support the organization and its initiatives.

3. b. Develop bylaws that include provisions for:

- **Membership:** In addition to existing EIP members (17 school districts and five community college campuses), identify other potential members and associate membership levels for key partnering organizations. Also identify how members are accepted into the organization.
- **Cabinet:** Outline Cabinet election process and responsibility, including scheduling the first election within two years of the interim Cabinet being established. Establish Cabinet membership categories, including:
  - Four superintendents reflecting the geographic and enrollment diversity of EIP;
  - Three school board members (from districts different than the superintendents) also reflecting the geographic and enrollment diversity within the partners; and
  - Two representatives of the Northeast Higher Education District, including one provost.

*Rationale:* The Cabinet should reflect the membership of EIP and be accountable to members, external funders and stakeholders for implementing the initiatives successfully. Superintendents have the most
responsibility for ensuring implementation of initiatives within a district. School board members provide an additional link to stakeholders, particularly the electorate. Having representatives of NEHED ensures the integration of the post-secondary institutions into the Model.

- **Dues:** Establish annual dues of $10,000 for each school district and community college campus to support the EIP organization and to participate in its initiatives. In light of districts’ varying budgets, EIP may choose among these or other options:
  - Create a minimum base level of dues and an additional dues’ level based on enrollment.
  - Ensure each district receives at least $10,000 in services (professional development, IT infrastructure, devices or support, etc.) annually.

  *Rationale:* Members, who will benefit from the work of EIP, also must be its greatest champions and supporters—committed to its ongoing success. Paying dues not only will sustain the work of EIP, it also will reinforce members’ ownership in the organization and its work and reflect the special privileges and benefits they will receive.

- **Meeting Schedule:** For Cabinet, committees, general membership, etc.
- **Decision-making:** Rights and responsibilities of the Cabinet, individual member organizations, decision-making between regularly scheduled meetings, etc.

3. **c.** Elect a permanent Cabinet representative of EIP members’ regional diversity, disparate enrollments and level of education provided within two years.

4. **Form EIP as a nonprofit corporation as soon as practical.**

  *Rationale:* While becoming a nonprofit requires several steps and ongoing reporting requirements, the process of creating a nonprofit organization parallels the recommendations above and offers clarity, transparency and, once tax-exempt status is granted, the ability for individuals and organizations to claim contributions to the EIP as tax deductions.

5. **Adopt an annual work plan incorporating work on all three initiatives and the formalization of the EIP structure that includes:**
   - Tasks to be achieved, including communication with stakeholders
   - Who/what organization is responsible
   - Deadlines
   - Measurement or metric that will be used to judge success
   - Regular meetings of the EIP Cabinet to ensure efforts stay on track
   - Ongoing communication to and within membership
Rationale: Achieving the goals of EIP always will be challenging, especially at the beginning of the organization’s work. Ensuring thoughtful planning of implementation steps, assigning deadlines and responsibility and tracking progress will help EIP stay on track, maintaining credibility with internal and external stakeholders.

6. **Based on the annual work plan, the EIP and its Administrator should consider whether to hire another staff person.**

   **Rationale:** The amount of work required to oversee implementation of the initiatives, including the initial offering of professional development courses through the Teaching, Learning and Leadership Academy, might require additional support to ensure success.

7. **Find office space that offers sufficient space for its needs – ultimately residing in the same location as the Teaching, Learning and Leadership Academy.**

   **Rationale:** The location ultimately must offer visibility to EIP’s programs, create meeting space for EIP members and the educational community at large and, ultimately, be the location for professional development offered by the Academy. To minimize concerns with favoritism and to maximize member buy-in, to the extent possible, the location should be independent of a school district or campus.

8. **Create and implement a development plan to secure funding from multiple partners.**

   **Rationale:** EIP’s vision of a regional, integrated learning system will be of interest to a number of foundations and other organizations. To ensure sustainability, the EIP Manager, working with steering committees for the initiatives, should identify funding sources that could support its initiatives and develop a strategic development plan to introduce these funding sources to the work of EIP and begin to develop a relationship that could lead to funding.

**Measurements of Success**

**Stakeholder engagement:** Early and consistent communication with faculty, school board members, parents and the community will lead to support of the Regional, Integrated Learning Model and its three initiatives.

**Participation in development of EIP initiatives:** Based on a clear and well understood work plan, districts, campuses and faculty are actively engaged in implementation steps.
**Funding:** Funding partners are aware and supportive of the development and implementation of EIP initiatives.

**ROADMAP**

The roadmap identifies specific tasks to be completed as part of each recommendation, the timeframe, outcome/result, potential one-time and annual expenses and responsibility assignments.

The timeline, in particular, could advance more quickly if Education Innovation Partners chooses to do so.
<table>
<thead>
<tr>
<th>Task</th>
<th>Timing</th>
<th>Outcome/Result</th>
<th>One-time expense</th>
<th>Estimate</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. COMMUNICATE WITH STAKEHOLDERS</strong></td>
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<tr>
<td>1.a. Communicate recommendations and implementation steps to faculty, administrators, school board members, parents, community members.</td>
<td>Month 1</td>
<td>Stakeholders at all levels know EIP initiatives, implementation steps and how they are affected</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Supers, provosts, organization leaders</td>
</tr>
<tr>
<td>1.b. Maintain ongoing communication with stakeholders on progress made</td>
<td>Month 2, ongoing</td>
<td>Stakeholders at all levels know EIP initiatives, implementation steps and how they are affected</td>
<td></td>
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<td>Supers, provosts, organization leaders</td>
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<tr>
<td><strong>2. HIRE ADMINISTRATOR</strong></td>
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<td>2.a. Convene EIP Cabinet to agree on the skills, qualifications and job description for an administrator</td>
<td>Month 1</td>
<td>Job description</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Cabinet</td>
</tr>
<tr>
<td>2.b. EIP Cabinet advertises position, reviews candidate resumes, interviews semi-finalists and hires finalist.</td>
<td>Months 2-3</td>
<td>Administrator</td>
<td>Ads in newspapers, web sites</td>
<td>$1,000</td>
<td>Salary, benefits</td>
<td>$80,000</td>
<td>Cabinet</td>
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<tr>
<td><strong>3. CREATE ORGANIZATION, GOVERNANCE STRUCTURE</strong></td>
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3.a. Create interim board/Cabinet based on one of three options  
   Month 1  
   Governing board for first two years  
   $0  
   Current EIP Cabinet, EIP members, others

3.b. Develop bylaws, including membership and annual dues structure  
   Month 2-4  
   Bylaws, membership dues  
   Dues @ $10,000/member  
   -$220,000  
   new EIP Cabinet, Members

3.c. Elect new board/Cabinet  
   Month 24  
   New board to replace interim  
   new EIP Cabinet, Members

4. FORM NON-PROFIT

3.a. EIP implements steps to form a nonprofit, using guidance from the Minnesota Council on Nonprofits.  
   Months 3-8  
   Nonprofit application approved by state, federal government; 501c3 status granted  
   Possible legal fees  
   $3,000  
   Filings  
   $0  
   Cabinet, Admin., attorney(?)

3.b. Follow ongoing reporting requirements  
   Month 8, ongoing  
   $0  
   Filings  
   $200  
   Admin.

4. DEVELOP ANNUAL WORK PLAN
4.a. Using the three EIP roadmaps, create detailed annual work plan for Admin., possible other staff, project management advisors and Cabinet, including: specific tasks, deadlines, accountability, measurements. Also include schedule of board meetings to gain necessary approvals and membership meetings to share information and gather input.

<table>
<thead>
<tr>
<th>Months 3-4</th>
<th>Detailed work plan</th>
</tr>
</thead>
</table>

4.b. The work plan process also should provide at least minimal detail for years two and three, if not longer, to allow for a longer-term look at strategies and implementation.

<table>
<thead>
<tr>
<th>Longer-range plan</th>
</tr>
</thead>
</table>

5. DECIDE WHETHER TO HIRE MORE STAFF

5.a. Based on tasks identified in work plan, Cabinet and Admin. should determine whether additional staff is needed to ensure successful implementation and what specific duties the staff would handle.

<table>
<thead>
<tr>
<th>Month 4</th>
<th>Job description for part-time staff member</th>
</tr>
</thead>
</table>

5.b. If the decision is made to hire more staff, advertise for position in local newspapers, job websites, State of Minnesota, etc.

<table>
<thead>
<tr>
<th>Month 4</th>
<th>Ads in newspaper, job sites, etc.</th>
</tr>
</thead>
</table>

5.c. Admin. organizes resumes for Cabinet together they select interview candidates and choose final candidate.

<table>
<thead>
<tr>
<th>Month 5</th>
<th>Part-time staffer</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Salary, benefits</th>
<th>$45,000</th>
</tr>
</thead>
</table>

### 6. CHOOSE BEST OFFICE LOCATION

<table>
<thead>
<tr>
<th>6.a. Based on needs identified in the work plan and spaces available, choose a site for EIP Offices that offers visibility and accessibility to members and can serve as the physical home of the Teaching, Learning and Leadership Academy.</th>
<th>Months 12-13</th>
<th>Permanent office space and space for Academy</th>
<th>Included in TLLA roadmap</th>
<th>Included in TLLA roadmap</th>
<th>Admin., Cabinet</th>
</tr>
</thead>
</table>

**6.a. ALTERNATIVE: If the EIP determines it cannot find space available for both EIP offices and the Academy immediately, choose office space to be used until the Academy space is found.**

<table>
<thead>
<tr>
<th>Months 12-13</th>
<th>Temporary office space</th>
<th>$0</th>
<th>Rent for one year</th>
<th>$24,000</th>
</tr>
</thead>
</table>

### 7. OUTFIT OFFICE

<table>
<thead>
<tr>
<th>7.a. Rent/purchase office furniture</th>
<th>Month 14-15</th>
<th>Professional working environment</th>
<th>Desk(s), tables, chairs, bookshelves, etc.</th>
<th>$10,000</th>
<th>$0</th>
<th>Admin.</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.b. Rent/purchase office equipment</td>
<td>Month 3-4</td>
<td>Professional working environment</td>
<td>Computers, printers, copiers, phone, etc.</td>
<td>$6,000</td>
<td>$0</td>
<td>Admin.</td>
</tr>
</tbody>
</table>
7.c. Purchase office supplies | Month 3-4 | Office supplies | Paper, pens, cartridges, envelopes, etc. | $1,500 | Replenishing | $1,000 | Admin. |
7.d. Ongoing utility costs | Ongoing | Phone, IT lines | | $0 |  | $2,400 | Admin. |
7.e. Other expenses | Ongoing | | | $0 | Professional fees, postage, travel, etc. | $8,000 | Admin. |

### 8. DEVELOP & IMPLEMENT
#### DEVELOPMENT PLAN

<table>
<thead>
<tr>
<th>8.a. Create compelling case for support for Regional, Integrated Learning Model, the three initiatives and elements of the implementation.</th>
<th>Month 6</th>
<th>Case for support to share with possible funding sources</th>
<th></th>
<th></th>
<th></th>
<th>Admin., Cabinet</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.b. Develop list of potential funding sources that links case for support to funders identified needs</td>
<td>Months 6-8</td>
<td>List of possible funding sources</td>
<td>$0</td>
<td>Membership for MN Council on Foundations data base</td>
<td>$300</td>
<td>Admin., Cabinet, EIP Membership</td>
</tr>
<tr>
<td>8.c. Develop a strategic plan for reaching out to funding sources, tapping potential linkages with sources.</td>
<td>Months 9-10</td>
<td>Development plan</td>
<td></td>
<td></td>
<td></td>
<td>Admin., Cabinet</td>
</tr>
</tbody>
</table>
## 8.d. Secure grants and other funding

<table>
<thead>
<tr>
<th>Activity</th>
<th>Month</th>
<th>Action</th>
<th>Budget</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secure grants and other funding</td>
<td>12, ongoing</td>
<td></td>
<td>$0</td>
<td>Grants</td>
</tr>
</tbody>
</table>

## 9. MEASUREMENT OF SUCCESS

<table>
<thead>
<tr>
<th>Activity</th>
<th>Month</th>
<th>Action</th>
<th>Budget</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.a. Measures of success should be discussed early on for EIP as an organization, perhaps incorporating additional measures of success from three initiatives. The Cabinet should decide what the region will measure, assess and suggest a plan for modification, if needed.</td>
<td>5-7 ongoing</td>
<td></td>
<td>Admin., Cabinet</td>
<td>$22,500</td>
</tr>
</tbody>
</table>
III. Teaching, Learning and Leadership Academy

Vision

The Teaching, Learning and Leadership Academy will celebrate and promote teaching excellence and educational leadership throughout the region, enriching and supporting teachers and administrators at all levels and creating a broad and diverse community of educators engaged in sustaining each other and implementing best practices – ultimately leading to greater student achievement regionwide.

Study after study reinforces the link between student achievement and the hard work of the teacher in the classroom. And the classroom teacher depends upon administrators to help create a culture of learning in the school building. Acknowledging, appreciating and supporting the critical role of educators and administrators, the Academy will:

- Maximize ongoing, meaningful professional development opportunities for all educators.
- Connect faculty across the region around content and/or grade-level expertise.
- Create collaborative learning communities to share best practices and pursue new learning.
- Energize and engage educators.
- Provide mentors for new teachers.
- Increase learning by educators and their students.

Definition

The Academy will identify current and future professional development needs among educators and administrators at all levels, including community college faculty, secure high-quality courses to meet them, and ensure ongoing local access to a variety of professional development opportunities—using technology whenever appropriate. The Academy will be as a single point of contact for educators interested in academic courses for:

- Re-licensure
- Specific pedagogical topics, such as using technology effectively, implementing personalized learning, etc.
- Content knowledge
- A particular grade level
- An advanced degree

Educators will have a variety of professional development options, including:

Training in best practices led by local experts
Training led by outside professionals and partnering organizations
Collaborative Learning Communities to share best practices and advance knowledge about content
Collaborative Learning Communities to share best practices and advance knowledge about pedagogical practices for particular grades
Access to online learning
Access to advanced degree programs offered by higher education facilities
Peer consultations and/or coaching
Cohort learning by principals, superintendents and other administrators
Mentoring

SITUATION ANALYSIS

A good teacher is like a candle - it consumes itself to light the way for others.
Author Unknown

Teaching is a demanding profession. Not only are teachers expected to master content knowledge and, in turn, help students of varied learning abilities master that content, they also must develop and maintain a positive classroom culture, handle individual student’s needs, stay current with technology and other teaching tools and participate in the school community.

Additionally, in Northeastern Minnesota, where many districts are small and may have a limited number of faculty, teachers also frequently work in isolation, alone in a classroom and not able to benefit from collaboration with other educators teaching the same grade level or subject matter.

In the face of these and other challenges, ongoing, supportive professional development is essential to nurturing educators, supporting their efforts to increase their knowledge and teaching proficiency and replenishing their energy, enthusiasm and passion for education and learning.

Research indicates educators need a minimum of 50 hours of professional development each year and time to reflect on how to incorporate what they’ve learned to increase their skills and their students’ learning. A 2009 report indicated that teachers who receive at least 50 hours of high-quality professional development increased students’ test scores by an average 21 percentage points.

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5 Darling-Hammond, Linda; Chung Wei, Ruth, and Adamson, Frank. NSDC and SCOPE, (2010, August), Professional Learning in the United States: Trends and Challenges, Part II of a Three-Phase Study, Executive Summary
6 Ibid

Minnesota law requires teachers to have 125 hours of professional development every five years – an average of 25 hours per year – or less than half what research indicates is optimal to improve student learning.

According to the National Staff Development Council study above: “Effective professional development is intensive, ongoing, and connected to practice; focuses on the teaching and learning of specific academic content; is connected to other school initiatives; and builds strong working relationships among teachers.”

Unfortunately, while districts currently provide some professional development, efforts to invest in educators are inconsistent throughout the region. Frequently, professional development is reduced to a “duty day” focusing on mandatory health/safety training and not on academic professional development for educators.

Frequently, professional development is delivered in short bursts of six-to-eight hours, which is less effective than training delivered over two or more consecutive days. Research comparing professional development of U.S. teachers with that of high-achieving developed nations found: “The United States is far behind in providing public school teachers with opportunities to participate in extended learning opportunities and productive collaborative communities…. This type of intense, collaborative, content-rich, and practice-focused professional learning, which leads to better student outcomes, is not typical in U.S. schools and districts.”

Additionally, for teachers in Northeastern Minnesota, many development opportunities are found in the Twin Cities or other locales out of the region, where the compounded costs of lost teaching time, acquisition of substitutes, travel and lodging are prohibitive.

The professional development available to educators in Northeastern Minnesota does not approach the amount or the type of professional development recommended by national research, nor do these opportunities maximize participation and ease of teacher access. In addition, the region fails to capitalize consistently and intentionally on the opportunity to link PreK-12 faculty with colleagues at the five community college campuses for professional development and discussions about preparation for the continuity of students’ learning from secondary to post-secondary institutions.

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7 Ibid
8 Ibid

Education Innovation Partners recognizes that to realize the promise of a Regional, Integrated Learning Model, the region must provide educators and administrators with the resources and support necessary to sustain and thrive in this demanding profession.

EIP identified the Teaching, Learning and Leadership Academy as one of the first three initiatives to create a Regional, Integrated Learning Model for Northeastern Minnesota.

**DESIR ED OUTCOMES**

**Students:**

Educators are the single most important factor in student performance. According to a study commissioned by the Bill and Melinda Gates Foundation, a teacher’s effectiveness has more impact on student learning than any other factor controlled by school systems, including class size, school size, and the quality of after-school programs.⁹

Educators with easy access to high quality professional development and the time to reflect on how to implement lessons learned into their classrooms will have more tools to encourage student achievement. Research locally and elsewhere suggest that key outcomes would be:

- Students who master content more easily because their teachers have learned a variety of best practices through collaboration with peers, training and other professional development.
- Students who benefit from the teaching expertise of hundreds of teachers across the district gained as teachers collaborate and form learning communities.
- Students who are engaged in learning because their teachers are engaged in learning.
- Students who are better prepared for post-secondary classes because of the collaboration and conversation between secondary and post-secondary educators.

**Educators:**

Extensive local research and research on models and best practices around the nation and in select foreign countries suggest desired outcomes include:

- Development of a Professional Development Plan (PDP) to help educators identify professional goals the courses to achieve them.
- Collaborative learning created by connecting educators across districts.

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⁹ Bill and Melinda Gates Foundation, (June 2010) Working with Teachers to Develop Fair and Reliable Measures of Effective Teaching.

- Educators who are up-to-date on the most current teaching methods to engage students.
- Greater access to other educators who can share best practices, creating collaborative learning communities around content or grade levels.
- Readily accessible, ongoing opportunities to improve teaching for students at all learning levels and abilities.
- Educators who maintain – or increase – enthusiasm for and success in teaching through ongoing professional development.
- Recognition within the district of educators’ investment of time in professional learning and compensation to reflect it.
- The opportunity for reflection and inquiry about how to incorporate learnings from professional development into classroom instruction.

Administrators:

As both educators and managers, school administrators will reap multiple benefits from creation of the Academy. In addition to the opportunity to work with educators who have access to more meaningful, robust professional development, administrators also will benefit from these outcomes:

- The ability to pool professional development resources to bring quality training to a regional setting.
- Development of a Professional Development Plan to help identify goals they have for professional development and to participate in courses to achieve them.
- Professional learning cohorts of administrators in similar roles, allowing for sharing of best practices.
- Professional learning opportunities encompassing an entire school or district, helping to develop and sustain a productive and supportive culture

KEY RECOMMENDATIONS

The Academy must be the gathering place for a true community of educators—passionately supported by faculty and administrators throughout the region, nurturing of its members and connected to the broader community of learners.

The Academy must be a supportive, single point of contact for all educators who want to increase their professional knowledge, skills and satisfaction. Learning about and participating in professional learning opportunities offered by the Academy must be easy and accessible for all. Technology will be used to support the Academy’s work wherever possible and appropriate.

Following the recommendations on Standards for Professional Learning¹⁰ that increases educator effectiveness and results for all students, the Academy will rely on:

- Learning communities or Collaborative Learning Communities committed to continuous improvement, collective responsibility and goal alignment
- Leadership that develops capacity, advocates and creates support systems for professional learning
- Resources – prioritizing, monitoring and coordinating
- Data from a variety of sources and types of students to plan, assess and evaluate professional learning
- Learning design that integrates theories, research and models of human learning
- Implementation that applies research on change and sustains support for long-term change
- Outcomes that align with educator performance and student curriculum standards

Professional development must be in a variety of formats and, based on research of effective development, must include collaboration to leverage the skills and talent of educators in the region who can serve as course leaders, peer coaches and mentors for educators.

Participation in the development opportunities should be guided by Professional Development Plans, consistent with each district’s continuing education expectations, when applicable.

The following recommendations are designed to achieve these outcomes in an organic, sustainable manner.
PROCESS: Creating the Teaching, Learning and Leadership Academy

1. Create an Academy Steering Committee to guide the gradual, organic growth of the Academy. Members should include:
   - At least one EIP Cabinet member to ensure communication between the groups
   - Two superintendents representing districts of different sizes (i.e. one large, one small); one may/may not be the same as the EIP Cabinet member
   - Two provosts
   - A local representative of Education Minnesota and a local representative of the Inter Faculty Organization
   - A representative from each district who participates in the its continuing education committee/committee that reviews and makes recommendations on professional development

   **Rationale:** The Academy will require insight, advice and expertise of educators and administrators to identify and secure meaningful professional development and ensure that districts and campuses recognize educators’ participation when it comes to compensation/lanes. Active participation of educators across the region is necessary to create a “community of educators focused on the needs of the region,” as discussed in a meeting with board members and superintendents.

2. Develop a financing model that provides equal opportunity for all educators to participate and an equal expectation that all districts will contribute. Among the opportunities the Academy Steering Committee should consider when developing its budget are:
   - Pool existing training dollars and participants to obtain lower cost, volume-based pricing on training desired by educators from multiple institutions or districts
   - Negotiate with training providers for lower rates in exchange for ongoing delivery of training – i.e. annual or biannual training
   - Leverage training provided by vendors
   - Create a robust development plan to secure funding from outside sources – foundations, corporations, individuals, etc. – to invest in student success via professional development for educators

   **Rationale:** The Academy must be able to develop a budget of anticipated funding (districts, other funders, individual tuition) and anticipated costs to recommend to the EIP Cabinet for approval.

While it is anticipated that districts will contribute some existing professional development dollars toward securing classes, the Academy also must seize the opportunity this unique collaboration provides to pursue financial support for
professional development from other organizations committed to teacher excellence, such as the Bill and Melinda Gates Foundation, vendors, etc.

3. **Determine whether educators will receive a stipend for attending some/all professional development opportunities during non-school hours or the summer.**

   **Rationale:** As part of its budget, the Academy Steering Committee should recommend to the EIP Cabinet whether and when educators should receive a stipend for participating in professional development, including the rationale for a stipend, under what circumstances a stipend should be granted and how much the stipend should be. The recommendation must take into account financial resources available, the fact that a stipend is not intended to duplicate wages and the sustainability of the stipends over time.

**PRODUCT: The Teaching, Learning and Leadership Academy**

4. **Conduct an online survey of educators and administrators to identify educators’ most immediate training needs, secure training to meet those needs and promote the course schedule as soon as possible.**

   **Rationale:** While building the Academy will take place over time, some immediate courses should be provided to generate enthusiasm and momentum for future professional development. Securing meaningful and accessible professional development immediately will build the Academy’s reputation while other efforts to create the Academy are moving forward.

5. **Create an online planning tool to help educators identify their development goals in a Professional Development Plan and map out the courses and steps to achieve the goals. Ensure that the goals and needed courses are collected by the Academy to help guide in course development and selection.**

   **Rationale:** Educators will gain the most from professional learning when it is tied to a self-identified goal. Having a plan also will ensure that professional development is intentional and focused – rather than leaving the choice of courses to chance or timing. Collecting the goals from the educational community it serves also will provide guidance to the Academy about the types of courses to schedule.

6. **Identify and develop partnerships with organizations that can deliver high-quality training requested by educators, included but not limited to:**
   - Vendors (i.e. Apple, TIES, Northeast Service Co-op, etc.)
   - Nonprofits (i.e. Minnesota Historical Society, Minnesota Humanities Center, etc.)
- Minnesota Department of Education
- Blandin Community Leadership Program
- MNSCU and the University of Minnesota, particularly for advanced degrees
- Private colleges, particularly for advanced degrees

*Rationale:* Developing partnerships with organizations that can provide high-quality professional development will allow the Academy to work with them to tailor professional development to the needs of regional educators. These partnerships should become long-term relationships, allowing the Academy to plan future training and establish preferential rates.

7. Create and publicize an annual course catalog, in consultation with EIP members and continuing education committees, that offers a variety of professional learning topics, such as:
   a. Education-related courses required for renewal of teaching licenses, such as use of technology in the classroom
   b. Courses based on certain pedagogical practices, such as using personalized learning to guide teaching or working with a specific grade level
   c. Courses designed to deepen and broaden understanding of a certain topic, such as history or biology
   d. Leadership courses
   e. Courses toward an advanced degree

*Rationale:* Working with each district’s continuing education committee will ensure professional development will be meaningful to each participant and recognized and appreciated by the local district. Having a course catalog allows educators to include professional development in their planning. Once developed, the course catalog must be distributed to educators throughout the region electronically and/or in hard copy.

8. Keeping in mind the importance of collaboration, provide various professional learning formats, such as:
   a. Collaborative Learning Communities based on pedagogical or content topics
   b. Best practices training led by local experts
   c. Best practices training led by experts outside the region
   d. Online courses
   e. Distance learning
   f. Cohort learning in leadership for similar groups of educators (i.e. principals, curriculum directors, superintendents, etc.)
   g. Cohort learning for advanced degrees
   h. School-wide Collaborative Learning Communities designed to develop and sustain school culture
   i. Peer learning programs
j. Online chat rooms for teachers to network, post questions about pedagogical or content issues, etc. (e.g. Ed Modo, Schoology, etc.)

*Rationale:* Working with training partners, the Academy should offer a variety of professional development formats to reflect the variety of needs and learning styles of each educator. Because research demonstrates the value of collaboration among educational professionals, every format should be designed intentionally to include the opportunity for educators to work together and learn from each other.

Research on effective professional development in high-achieving countries indicates common features, such as: “Extensive opportunities for both formal and informal, in-service development; time for professional learning and collaboration built into teachers’ work hours; professional development activities that are embedded in teachers contexts and that are ongoing over a period of time.”

9. Ensure that each training opportunity offered is intentional about collecting evaluations as to usefulness and effectiveness.

*Rationale:* The Academy continually must evaluate the quality of professional development it offers to ensure courses are meaningful and useful to participants. The data collected from these evaluations can be used to modify or eliminate courses for future catalogs.

10. Ensure that participants are given time during each training opportunity to reflect on how the learnings can be applied in their classrooms, schools, campuses or districts.

*Rationale:* Participants must be able to have time during the training to reflect on how they can use what they’ve learned to increase their success in their particular role. Providing reflection time also will encourage educators to continue to reflect on using the learnings in their classrooms.

11. Create a transcript of each participant’s Professional Development Plan and courses taken that can be used by the Department of Education for license renewal and also by the local district for determining possible lane (or educational credit-based) salary increases.

*Rationale:* If the Academy is to be the home of professional learning opportunities for educators, it also must serve as a central repository of data on the courses individual educators have completed as part of their Professional Development Plan. This information should be available as part of the state’s licensing and license renewal process and should be a consideration in assigning a teacher to a lane on the salary grid.

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11 Professional Learning in the Learning Profession. NSDC (February 2009)

12. Develop a formal mentoring program for new teachers to ensure they have the support they need for success in the classroom, to create bonds with other educators and to reinforce that the Academy is the home of professional development for educators. Consider how to provide credit on the Professional Development Plan for teachers who take on the added role of mentor/and the new teacher being mentored.

**Rationale:** Formalizing the mentoring – identifying anticipated outcomes and steps to achieve them and written expectations of the mentoring teacher and the new teacher – will help ensure new teachers get the maximum benefit from the program. A formal program also will give teachers who serve as mentors a clear set of expectations for themselves and the new teacher they are mentoring; meeting these expectations should be noted on their personal development plan and included in lane considerations at the school district.

Formal mentoring – or induction – programs were cited in research about building effective teaching capacity in inner city schools, as well as in high-achieving countries.

13. **House the Academy in a centrally located facility with space for training and with the technology infrastructure necessary to support extensive use of technology**

**Rationale:** Creating a physical home for the Academy – a training center that welcomes educators, offers opportunities to experiment with technology in the classroom and becomes a familiar gathering place for collaborative learning communities – will maximize its success over time. Additionally, the technology training space could be rented out to other, non-educational organizations when not in use by educators – creating an opportunity to earn revenue from the investment. The centrally located facility should have a welcoming lounge area, several training rooms of different sizes, and readily available parking.

14. **Highlight and showcase the use of technology in learning.**

**Rationale:** The Academy must be at the forefront of using technology in the delivery of training content, in the creation and maintenance of learning communities and in the provision of distance learning opportunities—where appropriate, modeling the use of technology in its professional development. The Academy also must provide educators with the opportunity to practice the use of technology in instruction before they’re expected to use it in their classrooms. Finally, the Academy must stay abreast of new opportunities to use technology to increase learning – not just to follow the latest technological trend.
Measures of Success

The Academy Steering Committee and the EIP Cabinet should be intentional about identifying specific measures of success for the Academy and about how the data will be collected, reviewed and lead to modifications of courses or practices, as necessary. Some measurements might include:

- **Engagement**: Are educators participating in the courses offered? Is participation increasing over time?

- **Educator Evaluations**: Are educators satisfied with the courses they’ve taken? What improvements would they suggest? What courses or learning opportunities are missing?

- **Attainment of goal identified in Professional Development**: Are educators achieving the goals they’ve set for themselves? At what rate? Could the Academy do more to help educators achieve their goals?

- **Lane Changes**: Are more educators in the region eligible for lane changes based on courses taken at the Academy?

- **Mentors**: How many teachers have become mentors?

Roadmap

A Teaching, Learning and Leadership roadmap and cost placeholder spreadsheet is below. The roadmap identifies specific tasks to be completed as part of each recommendation, a potential timeframe, outcome/result, potential one-time and annual expenses and responsibility assignments.

The timeline, in particular, could advance more quickly if Education Innovation Partners chooses to do so.
### PROCESS RECOMMENDATIONS

#### 1. ACADEMY STEERING COMMITTEE

<table>
<thead>
<tr>
<th>Task</th>
<th>Timing</th>
<th>Outcome/Result</th>
<th>One-time expense</th>
<th>Estimate</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.a. EIP Cabinet creates Academy Steering Committee. Consider membership to include: 1 EIP Cabinet member; 2 superintendents; 1 provosts; 1 local representative from Education Minnesota; 1 local representative from the MNSCU Inter Faculty Organization; 1 rep from each district's continuing education committee</td>
<td>Month 4</td>
<td>Academy Steering Committee formed</td>
<td>$0</td>
<td>$0</td>
<td>Cabinet, Admin.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.b. Academy Steering Committee and Admin. recommend to Cabinet: goals of Academy; one-, two- and three- year work plan to achieve goals</td>
<td>Months 5-7</td>
<td>Work plan to achieve Academy goals</td>
<td>$0</td>
<td>$0</td>
<td>Admin., Academy Steering Committee</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 2. ACADEMY FINANCIAL MODELS

<table>
<thead>
<tr>
<th>Task</th>
<th>Timing</th>
<th>Outcome/Result</th>
<th>One-time expense</th>
<th>Estimate</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.a. Academy Steering Committee financing options, including: actively seeking outside financial support from foundations, vendors, businesses, individuals; pooling district training dollars, obtaining volume-based discounts; negotiating reduced rates based on regularly scheduled training, etc.</td>
<td>Month 7-9</td>
<td>Input from educators</td>
<td>$0</td>
<td>Districts' training support, donors, etc.</td>
<td>-$30,000</td>
<td>Admin., Academy Steering Committee</td>
<td></td>
</tr>
</tbody>
</table>
2.b. Based on estimated revenues available, Academy Steering Committee recommends annual budget to Cabinet that includes estimated courses, associated expenses and revenues. | Month 9 | Annual TLLA Budget |  | Admin., Academy Steering Committee |

2.c. Cabinet approves budget | Month 9 | Annual TLLA Budget | $0 | $0 | Cabinet |

### 3. STIPEND RECOMMENDATION

3.a. As part of developing an annual budget, Academy Steering Committee makes recommendation to Cabinet about educator stipends. | Month 9 | Policy on educator stipends | TBD | TBD | $0 | Academy Steering Committee, Cabinet |

### PRODUCT RECOMMENDATIONS

#### 4. EDUCATOR SURVEY/TRAINING

4.a. Conduct an online survey of educators and administrators at all level to identify educators' immediate training needs. | Month 3 | Priority training needs of regional educators | $0 | Survey Monkey subscription | $250 | Admin. |

4.b. Identify top three to four courses, based on survey, and secure training and location for courses. | Month 4 | 3-4 Academy-sponsored courses | $0 | Admin. |

4.c. Inform educators electronically of course availability and solicit RSVPs | Month 5-6 | Educators aware of, participating in courses | $0 | Admin. |
<table>
<thead>
<tr>
<th>4.d. Conduct courses. Estimated maximum cost: 100 faculty x 25 hours x $25/hour of training)</th>
<th>Month 8-9</th>
<th></th>
<th>$62,500</th>
<th></th>
</tr>
</thead>
</table>

**5. ONLINE PROFESSIONAL DEVELOPMENT TOOL**

| 5.a. Create online Professional Development Plan (PDP) tool on EIP web site where educators identify professional development goals and courses needed to achieve them. Educators can track progress. EIP can use goals/courses to identify courses to schedule. | Month 9 | Online planning tool for educators and TLLA | Build whole TLLA website, including PDP, course listings, registration, | $50,000 | maintenance, updates | $2,000 | Admin., Academy Steering Committee, web site developer |
| | | | | | | | |
| 5.b. Based on goals/courses from educators’ Professional Development Plans, begin researching training options | Months 10-12 | Beginning of course catalog, based on demand |  |  | $0 |  | Admin., Academy Steering Committee |
| | | | | | | | |

**6. PROFESSIONAL DEVELOPMENT PARTNERSHIPS**

| 6.a. Identify/develop partnerships to provide high-quality training from: Vendors (i.e. Apple, NESC, CISCO, TIES); Nonprofits (MN Historical Society, MN Humanities Center, etc.); MN Dept. of Education; MNSCU/U of M; private colleges; Blandin Community Leadership Program, others. | Months 4 - 12 and beyond | Group of partners to help provide courses |  |  | Admin., Academy Steering Committee, Cabinet, EIP Members |
| | | | | | | | |
| 6.b. Working with partners, develop list of courses they can provide/timing of courses | Month 12 and beyond | List of courses and timing |  |  | Admin., Academy Steering Committee |
| | | | | | | | |
### 7-8. CREATE/PUBLICIZE COURSE CATALOG

<table>
<thead>
<tr>
<th>Task</th>
<th>Timeframe</th>
<th>Cost</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.a. Identify other professional development opportunities, including: educational courses required to renew licenses; pedagogical courses; content-based courses; leadership courses; courses toward a professional degree.</td>
<td>Month 12, ongoing</td>
<td>$0</td>
<td>Admin., Academy Steering Committee</td>
</tr>
<tr>
<td>7.b. Determine best methods for delivery of training, including: collaborative learning communities, best practices by local experts, best practice by outside experts, online learning, distance learning, leadership cohorts, advanced degree cohorts, school-wide cohorts, peer learning programs</td>
<td>Month 12, ongoing</td>
<td>$0</td>
<td>Admin., Academy Steering Committee</td>
</tr>
<tr>
<td>7.c. Develop course catalog</td>
<td>Month 12</td>
<td>Course catalog online, some paper copies</td>
<td>Printing $500</td>
</tr>
<tr>
<td>7.d. Distribute course catalog</td>
<td>Month 12 ongoing</td>
<td>Postage $500</td>
<td></td>
</tr>
<tr>
<td>7.e. Register participants</td>
<td>Ongoing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.f. Estimated maximum cost for training (1,450 teachers X 50 hours X $25/hour average cost of courses)</td>
<td>Month 12 ongoing</td>
<td>Training</td>
<td></td>
</tr>
</tbody>
</table>

### 9. EVALUATE COURSES

<table>
<thead>
<tr>
<th>Task</th>
<th>Timeframe</th>
<th>Cost</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9.a. Ensure that each professional learning opportunity offered has an evaluation component.</td>
<td>Month 8 ongoing</td>
<td>Ongoing data about caliber of courses</td>
<td></td>
</tr>
</tbody>
</table>
9.b. Revise/eliminate courses or trainers with poor evaluations | Month 8 ongoing | $0 | $0 | Admin. Academy Steering Committee

### 10. ENSURE OPPORTUNITY FOR REFLECTION

| 10.a. Ensure that all trainers/group leaders allow sufficient time for reflection on how to use learnings in classroom | Month 8 ongoing | Ongoing opportunity for educators to increase comfort with new learning | $0 | $0 | Admin. Academy Steering Committee

| 10.b. Poll participants one month and two months after training to determine how the information is integrated into classroom | Month 10 ongoing | Opportunity to learn whether courses are helpful | $0 | $0 | Admin. Academy Steering Committee

| 10.c. Pass results on integration on to trainers and Academy Steering Committee | Month 10 ongoing | Trainers can improve; Academy more aware of use of coursework in classroom | $0 | $0 | Admin. Academy Steering Committee

### 11. CREATE INDIVIDUAL RECORD OF PROFESSIONAL DEVELOPMENT PLAN
11.a. Create online transcript of educators' participation in development and progress toward Professional Development Plan to create a transcript that can be shared with state for license renewal purposes and with local district for salary discussions based on lanes.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Cost</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 9</td>
<td>Educators can track progress toward goals</td>
<td>$0</td>
<td>Admin. Academy Steering Committee</td>
</tr>
<tr>
<td>Ongoing</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

11.b. Use (anonymous) compilations of courses taken, number of participants, etc. to track progress of Academy in helping educators meet professional development goals.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Cost</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 12</td>
<td>Academy can determine success of programs, modify as necessary</td>
<td>$0</td>
<td>Admin. Academy Steering Committee</td>
</tr>
<tr>
<td>Ongoing</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

12. MENTORING PROGRAM FOR NEW TEACHERS

12.a. Create formal mentoring program for new teachers, pairing new teachers with seasoned teachers who have similar content or grade level expertise.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Cost</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 9-12</td>
<td>Mentoring program to support new teachers</td>
<td>$0</td>
<td>Admin. Academy Steering Committee</td>
</tr>
</tbody>
</table>

12.b. Develop written expectations for mentoring teacher and new teacher under mentoring program

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Cost</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 9-12</td>
<td></td>
<td>$0</td>
<td>Admin. Academy Steering Committee</td>
</tr>
</tbody>
</table>

12.c. Working with local districts, determine how to give credit to mentoring teachers (and new teachers?) for the time and energy expended.

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Cost</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 9-12</td>
<td></td>
<td>$0</td>
<td>Admin., Academy Steering Committee, Districts</td>
</tr>
<tr>
<td></td>
<td>12.d. Determine best method to identify new teachers in districts, seasoned teachers willing to be mentors and pairing process</td>
<td>Month 9-12</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
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<td>---</td>
</tr>
<tr>
<td></td>
<td>12.e. Implement program</td>
<td>Month 13</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12.e. Create additional opportunities at the Academy for mentors and the new teachers to interact, have conversations, etc.</td>
<td>Month 13 ongoing</td>
<td>$0</td>
</tr>
</tbody>
</table>

### ACADEMY BUILDING

<table>
<thead>
<tr>
<th></th>
<th>13.a. Identify a centrally located building to house EIP and the Academy with necessary technology infrastructure.</th>
<th>As soon as practical</th>
<th>Home for EIP and Academy; Visibility for effort</th>
<th>Purchase, remodel building</th>
<th>$250,000</th>
<th>Utilities</th>
<th>$20,000</th>
<th>Admin., Cabinet</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13.b. Create flexible training spaces that accommodate groups of different sizes.</td>
<td>As soon as practical</td>
<td>Furniture</td>
<td>$15,000</td>
<td>Supplies</td>
<td>$3,000</td>
<td>Admin., Academy Steering committee</td>
<td></td>
</tr>
<tr>
<td></td>
<td>13.c. Consider a non-traditional setting for cohort learning -- more living room than classroom.</td>
<td>As soon as practical</td>
<td>Furniture</td>
<td>$10,000</td>
<td></td>
<td></td>
<td>Admin., Academy Steering Committee</td>
<td></td>
</tr>
</tbody>
</table>

### SHOWCASE TECHNOLOGY TO ENHANCE LEARNING
| 14.a. Wherever possible and appropriate, incorporate technology into all professional development offered. | As soon as practical | Classroom with 30 iPads, MacBook Pro, Bretford cart, cases, etc. | Equipment | $30,000 | Replacement every three years |
| 14.b. Provide mock classrooms where educators can practice using technology in teaching. | As soon as practical | Classroom with 30 iPads, MacBook Pro, Bretford cart, cases, etc. | Equipment | $30,000 | Replacement every three years |
| 14.c. Provide distance learning opportunities. | As soon as practical | TBD | TBD | | |
| 14.d. Consider training/leasing training space out to non-educators as a revenue enhancer. | As soon as practical | Rental to outside parties | -$5,000 | |

**15. MEASUREMENTS OF SUCCESS**

| 15.a. Measures of success should be discussed early on. The Academy Steering Committee should make recommendations on what the region will measure, assess and suggest a plan for modification, if needed. | Month 5-7, ongoing | | Admin., Academy Steering Committee |

| TOTALS | | | | $418,500 | $1,803,350 |
IV. Personalized Learning

Vision

EIP school districts will graduate more students sufficiently prepared to enter post-secondary education and/or a career of their choice. The learning experience will be engaging, relevant and personalized, using technology to maximize every student’s potential.

Through a region-wide commitment to personalized learning pedagogy and instruction, professional learning and leadership, and the technology to support this initiative, students will have more opportunities to direct their learning. They will be able to learn at their own pace in a way that meets their individual learning style and explore topics and paths that interest them.

Colleges will spend less time on remediation because students will be properly prepared and students will graduate from their programs ready to enter the workforce. Employers will have workers who are prepared to meet the demands of the 21st century workforce. Northeastern Minnesota will be known for its continued commitment to education innovation and having a highly skilled and prepared workforce.

Numerous research studies have shown that for personalized learning implementation to be successful and sustainable, there are a number of key factors that need to be considered:

- Pedagogy and Instruction
- Curriculum and Assessment
- Professional Learning and Leadership
- Data and Information Systems
- Policies and Procedures
- Technology Hardware/Software and Infrastructure

This cannot be a pilot project; it needs to be a commitment. Educators have seen too many programs come and go and are skeptical about the sustainability of new programs.

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12 Wisconsin Department of Public Instruction [Recommendations to Achieve Personalized Learning] from https://sites.google.com/a/dpi.wi.gov/wi_digital_learning_plan/personalized-learning---rcmd
They need to clearly understand the benefits to them and their students and have the appropriate training and time to do what is being asked of them.

**DEFINITIONS**

*Personalized Learning* is sometimes referred to as *individualized learning, blended learning, flipped learning, customized learning, differentiated learning, student-centric learning, self-directed learning or 1:1 learning*. Each of these terms has slightly different meanings but is often used to describe a similar concept. Personalized learning is a holistic approach that recognizes each student’s unique backgrounds, interests, strengths, skills, aptitudes, career interests, learning styles and personal goals. The data is often contained in an electronic record and educators, students and parents all contribute to the record. Educators can use the data in the record to become more familiar with the student early on and as an assessment tool to help better understand how to engage each student.

*Personal Learning Devices* are mobile and can support learning anywhere and at any time. The goal is that all students will have a device of their own to use throughout their school years. According to Project Red research, the closer the student-computer ratio gets to 1:1, the better the outcomes. Technology can transform education by simplifying access to great material, providing new approaches to learning, and offering a framework for assessing student progress in real time. Recommendations on personal learning devices are provided in the Regional Technology Plan.

*Personal Learning Plans* are electronic records that allow students to set goals and establish a roadmap for achievement and allow educators and parents to track progress and assess in real time. These are sometimes referred to as *Individual Learning Plans (ILPs)*.

The goal is that all students in grades Kindergarten through Post-Secondary will have a Personalized Learning Plan that will be easily transferrable among grades, schools, districts and college campuses.

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SITUATION ANALYSIS

“Today knowledge is ubiquitous, constantly changing, growing exponentially... Today knowledge is free. It’s like air, it’s like water. It’s become a commodity... There’s no competitive advantage today in knowing more than the person next to you. The world doesn’t care what you know. What the world cares about is what you can do with what you know.”

- Harvard Innovation Education Fellow Tony Wagner

Our world has changed significantly since the founding of the United States education system. With the advent of the Internet, we have more information available to us than ever before and we can access it many formats – video, audio, games, etc. To truly engage students, improve student performance and graduation rates, and prepare students to graduate with the skills and knowledge they need to enter post-secondary education or careers, students need to use the vast resources and multi-media presentations that are available to them to tap into individual learning styles and interests.

Research shows that giving students ownership of developing, planning and monitoring their goals increases their level of engagement in their own education and increases the likelihood they will graduate from high school and successfully enroll in post-secondary education and attain a degree.

Personal Learning Plans (PLPs) are one way for students to set goals and track personal achievement and for educators to assess, comment and guide. Parents also are expected to contribute to the record and can review progress at any time.

As of April 2011, 25 states and the District of Columbia mandate ILPs for all students and three states mandate a guidance framework that does not include a formal planning document. Twenty-two states do not have a mandate, including Minnesota, but nine of them provide ILP models and 13 provide a guidance framework for districts to use. These primarily focus on grades 9-12 and are used for career planning. However, a significant number have also started to take a more holistic approach.

The top priority for the U.S. Department of Education’s new Race to the Top-District (RTT–D) competition is to create personalized-learning environments to bolster student achievement.

One of the challenges many districts are struggling with is providing meaningful, real-time data about student performance to educators. This is due to the fragmented nature of data systems in school districts the lack of common standards across states, and the financial challenges of providing professional development to data users.

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Education Innovation Partners has identified Personal Learning Plans as one of its three key initiatives. Some schools within the collaboration have started pilot programs using PLPs and many are considering implementing them. In addition, some schools are tracking pieces of individual records in their student information systems, but it’s not being done in a regional, systematic way.

**Desired Outcomes**

Regional and national research suggests that desired outcomes for personalized learning include but are not limited to:

**Students:**

- Students graduating sufficiently prepared to enter post-secondary education and/or a career of their choice because they will have set goals and followed a roadmap to achieve their goals.
- Students engaging in their learning, and thus reaching their full potential, because they will help direct their own learning, and educators will have better information on how to tap into personal interests and learning styles.
- Students feeling more welcomed because educators will have the opportunity to learn about each student’s background through an electronic personal learning plan before the student enters the classroom.
- Students having higher self-esteem and confidence in learning because educators recognize that not every student learns in the same way or at the same pace and adapt their teaching to meet the needs of all learners.

**Educators:**

- Educators knowing students on a deeper level and tailoring learning to unique interests, strengths and learning styles.
- Educators having meaningful, real-time data about student performance and assessing more quickly which students are getting it and which students need additional help and tailoring lessons accordingly.
- Educators having easily accessible resources and content to help different groups of learners – high achievers, average and below average – accelerate at their own pace of learning and content mastery.
- Educators being able to start the year with a solid understanding and plan to reach individual and groups of students because they will be able to easily access data profiles.
- Educators embracing personalized learning because they are provided with meaningful and relevant professional learning and leadership opportunities through the Teaching, Learning and Leadership Academy and are sharing best practices and content resources with a regional network of colleagues.
Administrators:

- Districts welcoming transfer students with seamless enrollment, reduced paperwork, and a complete student record because electronic student records can be transmitted more quickly and efficiently as students move across district lines.
- Administrators having more accountability and monitoring of individual and group achievement because they will have access to additional data points and trend reports – school, district and regional reports.

Parents:

- Parents having greater access to information about their child’s progress, strengths and areas that need improvement.
- Parents learning about areas that need additional work far enough in advance to make improvements necessary for success.
- Parents being more engaged because they will have a direct role in contributing to and reviewing their child’s progress.

RECOMMENDATIONS

Process

1. Use the name “Personalized Learning” to refer to the initiative and “Personal Learning Plan” to refer to the tool.

_Rationale:_ Distinction should be made about the pedagogy and instruction of personalized learning versus the tool to track it. Through the regional research process, we learned that the name Individual Learning Plans (ILPs) was not well received. It was often confused with Individual Education Plans (IEPS), which are used in special education. People immediately envisioned a 16-page, cumbersome tracking system that involved lots of paperwork with no added value for student achievement. ILPs also are commonly used in high school, but not lower grade levels.

2. Establish a regional Personalized Learning Steering Committee to guide embedding personalized learning pedagogy and instruction in the classroom, recommending professional development courses, and suggesting software to track and monitor student achievement. Members should include:
   - At least one EIP Cabinet member to ensure communication between the groups
   - Two guidance counselors representing districts of different sizes
   - Two principals representing districts of different sizes
   - A local representative of Education Minnesota
- At least three teachers, including representatives from elementary, middle and high school
- Two higher education admissions counselors

**Rationale:** Educators need to be deeply involved in and drive the transformation for this initiative to be successful. They need to understand the “whys,” relevancy and benefits to them and their students. Many great teachers are intuitively developing their own systems for discovering more about their students’ interests, backgrounds and abilities, but there is not a systematic way for that knowledge to be shared with other teachers, parents and other districts should that student transfer. Important insights are lost from year to year.

3. **Educators should receive ongoing professional development and leadership opportunities related specifically to personalized learning.**

**Rationale:** With increasingly large class sizes, it’s a challenge to devote the time needed to work with different groups of learners – high achievers, average and below average – and move them all along at their own pace and in a way that they can understand what is being taught and have time to reflect. Through the regional research, students raised concerns about moving so quickly and not having time to reflect or master content before having to move on to the next item.

Significant concern was raised by educators that this is just one more thing to do and is the latest pilot project without the resources, time, training or sustained support to truly make a difference. For this region-wide effort to be successful, we need to involve teachers in the planning process and provide them with the support they need.

Through the Teaching, Learning and Leadership Academy, educators can take courses that will help ensure success in implementing this approach.

The Personalized Learning Steering Committee can provide further recommendations in each of these areas:

- Pedagogy and Instruction
- Curriculum and Assessment
- Personal Learning Plans

**Product:**

4. **Personal Learning Plans should be electronic, start in Kindergarten and continue through post-secondary education, and contain key components identified through research to increase student engagement and achievement and provide educators with meaningful data to assess and assist students in real time.**
**Rationale:** Schools in the EIP districts should reach agreement on common characteristics to include in Personal Learning Plans. With a set of common characteristics and software, the records will be easily transferrable among EIP districts and administrators will have school, district and regional sets of data for assessment.

Personal Learning Plans should be customized to students’ interests and goals and those should be identified early on so there is time to help guide, assess and re-assess. There needs to be a balance of solid data and information but easy to use so that all will participate. In summary, personal records provide reflection and a roadmap for students and a holistic assessment tool for educators.

Through regional and national research, these components are most commonly identified:

**What should be included in a Personal Learning Plan:**

- **Academic:** Test scores, courses taken, strengths/weaknesses
- **Program of Study/Career:** Interests, goals, and roadmap for reaching goals
- **Personality and Learning Styles:** Interest inventories and sparks, student reflection data
- **Activities:** Extracurricular activities, athletics, volunteer, service learning, leadership, and leisure activities with awards
- **Accomplishments:** Awards and honors, Program of Study (course plans for middle school, high school and post-secondary, postsecondary majors or training program areas, goal statement)

**What should not be included in a Personal Learning Plan:**

Regional focus group participants are most concerned about protecting privacy and not stereotyping or pigeonholing students.

- **Behavior:** Students, parents and teachers all expressed concern about one bad choice marking a student through the years.
- **Blanket Statements:** “Joan is not good at math.”
- **Detailed Personal Information:** Students voiced concerns that they may trust individual teachers to share something personal with, but they don’t want to see it become part of a personal record; the fear of this may cause students not to talk to a trusted adult.

4. a. **Provide a recommendation on key components that should be included in a regional Personal Learning Plan.**
**Rationale:** There are many components that could be included in Personal Learning Plan. The Personalized Learning Steering Committee should recommend guidelines for regional consistency.

4. **b. Develop a plan for communication and implementation.**

**Rationale:** Communication is essential for explaining the desired outcomes of this initiative. Implementation will be woven in with software selection and implementation.

5. **Review and provide a recommendation for a region-wide software system for Personal Learning Plans.**

**Rationale:** There are many student information systems (SIS) that provide as much or as little as school districts need. Given the complexity of systems and that many personalized learning modules are part of a larger district information system, it’s important for users to have direct input into what best meets their needs. This is not an easy task, as one of the greatest challenges individual districts face is integrating their own data systems. However, the goal of EIP is to provide common platforms and equal access to gain the most efficiencies and best results for students and districts.

Through our regional and national research a number of vendors were identified and the potential list is much longer as many companies are entering this market:

- Naviance
- Pearson Schoolnet Suite
- Infinite Campus
- TIES Cognos
- Moodle

5. **a. The Personalized Learning Steering Committee should review pros/cons of software packages through conversations with vendors and participation in demos.**

**Rationale:** First-hand experience through product demonstrations with different personalized learning modules will allow educators to gain practical experience in how these can benefit students. Concerns about how much time it takes also can be answered.

5. **b. The Personalized Learning Steering Committee should conduct an electronic survey of principals, teachers and counselors to determine what student information software is being used, to what extent and user likes/dislikes.**
Rationale: In addition to gaining first-hand experience with products, it will be important to gain a user’s perspective as well and acquire an understanding into what districts are currently using what systems.

5. c. The Personalized Learning Steering Committee should recommend a software package to be implemented within all EIP districts.

Rationale: To assist in the ease of transferring records and monitoring and assessing regional data, EIP should select one common software package.

5. d. Seek competitive bids from vendors to refine placeholder cost estimate.

Rationale: The Administrator will seek competitive bids and refine the placeholder cost estimate.

5. e. Determine potential funding partners and seek funding.

Rationale: There are many grants and various sources of funding available. A partial list of potential funding partners and sources is included in the Appendix.

6. Develop a tiered approach for determining responsibility and accountability and implementing regional Personal Learning Plans using best practices data.

Rationale: One of the biggest concerns raised was the amount of time it would take for educators to enter data and a general feeling that it wouldn’t be used in the way it is intended anyway. Research shows that students should be the driver of their plan as much as possible, especially in the middle and high school years. In elementary school, students should have input into their record but teachers and parents also will be strong contributors during these foundational years.

It might make most sense to implement plans in grades K-2 across all districts and then the plans can “grow up” with the students. After further research, Individual Learning Committee makes this recommendation.

7. Identify potential measures of success and a plan for assessing and modifying, if necessary.

Rationale: It is important to identify potential measures of success before implementing this initiative and having a clear plan for assessment and modification. Some of the potential criteria will be easier to measure than others.
Project Red identified 11 Education Success Measures (EMS) after conducting extensive national research.

**All Schools:**
- Disciplinary Action Rate
- Dropout Rate
- High-Stakes Test Scores
- Paper and Copying Expenses
- Paperwork Reduction
- Teacher Attendance

**High Schools:**
- AP Course Enrollment
- College Attendance Plans
- Course Completion Rates
- Dual/Joint Enrollment in College
- Graduation Rates

**ROADMAP AND COST PLACEHOLDERS**

An individualized learning roadmap and cost placeholder spreadsheet is attached. The roadmap identifies specific tasks to be completed as part of each recommendation, the timeframe, outcome/result, potential one-time and annual expenses and responsibility assignments.
### PROCESS RECOMMENDATIONS

#### 1. INITIATIVE DEFINITION AGREEMENT

**a. EIP Cabinet reviews and agrees upon differentiating personalized learning pedagogy and instruction and Personal Learning Plans**

<table>
<thead>
<tr>
<th>Task</th>
<th>Timing</th>
<th>Outcome/Result</th>
<th>One-time expense</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Month 1</td>
<td>Cabinet will use new common language to describe initiative</td>
<td>$0</td>
<td>$0</td>
<td>Cabinet</td>
<td></td>
</tr>
</tbody>
</table>

#### 2. PERSONALIZED LEARNING STEERING COMMITTEE

**a. EIP Cabinet creates Personalized Learning Steering Committee. Membership includes: 1 EIP Cabinet member; 2 guidance counselors; 1 local representative from Education Minnesota; 3 teachers representing elementary, middle and high school; 2 higher education representatives**

<table>
<thead>
<tr>
<th>Task</th>
<th>Timing</th>
<th>Outcome/Result</th>
<th>One-time expense</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Month 4</td>
<td>Personalized Learning Steering Committee formed</td>
<td>$0</td>
<td>$0</td>
<td>Cabinet, Admin</td>
<td></td>
</tr>
</tbody>
</table>

**b. Personalized Learning Steering Committee and Administrator recommend to EIP Cabinet: implementation of individualized learning and one-, two- and three-year work plan to achieve goals outline below**

<table>
<thead>
<tr>
<th>Task</th>
<th>Timing</th>
<th>Outcome/Result</th>
<th>One-time expense</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Months 5-7</td>
<td>Work plan to achieve Personalized Learning implementation</td>
<td>$0</td>
<td>$0</td>
<td>Admin, Personalized Learning Steering Committee</td>
<td></td>
</tr>
</tbody>
</table>

#### 3. PROFESSIONAL DEVELOPMENT RECOMMENDATION

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### a. Personalized Learning Steering Committee

Studies and identifies communication and training needs to ensure successful and sustainable implementation of individualized instruction and effective use of learning devices and software to track.

| Month 7-9 | Input from educators | $0 |

### b. Individualized Learning Steering Committee

Recommends course needs to Academy Steering Committee.

| Month 9 | Personalized Learning Course Needs | $0 |

### PRODUCT RECOMMENDATIONS

#### 4. COMMON CRITERIA RECOMMENDATION

a. Personalized Learning Steering Committee reviews consultant recommendations and determines what will work best for their region.

| Month 7-9 | $0 |

b. Personalized Learning Steering Committee recommends common criteria for personal learning plans.

| Month 9 | Common Criteria for Personal Learning Plans | $0 |

#### 5. SOFTWARE RECOMMENDATION
## 5. IMPLEMENTATION PLAN

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Timeframe</th>
<th>Costs</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>Personalized Learning Steering Committee reviews pros/cons of software packages through conversations with vendors and participation in demos</td>
<td>Month 10-11</td>
<td>Input from vendors</td>
<td>$0</td>
</tr>
<tr>
<td>b.</td>
<td>Personalized Learning Steering Committee conducts survey of principals, teachers and counselors to determine what is currently being used, to what extent and pros/cons of various systems</td>
<td>Month 10-11</td>
<td>Input from principals, teachers and counselors</td>
<td>Admin, Personalized Learning Steering Committee</td>
</tr>
<tr>
<td>c.</td>
<td>Personalized Learning Steering Committee recommends software package to Cabinet</td>
<td>Month 12</td>
<td>Recommended software package or packages</td>
<td>Admin, Personalized Learning Steering Committee</td>
</tr>
<tr>
<td>d.</td>
<td>Administrator explores costs and potential funding sources</td>
<td>Month 13</td>
<td>Initial purchase, vendor training, data loading</td>
<td>$550,000</td>
</tr>
<tr>
<td>d.</td>
<td>Administrator explores costs and potential funding sources</td>
<td>Month 13</td>
<td>Ongoing maintenance fees</td>
<td>$65,000</td>
</tr>
</tbody>
</table>

## 6. IMPLEMENTATION RECOMMENDATION

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Timeframe</th>
<th>Costs</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>Personalized Learning Steering Committee reviews survey on Personalized Learning Plans</td>
<td>Month 10-11</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>b.</td>
<td>Personalized Learning Steering Committee makes recommendation on rollout of Personal Learning Plans across all districts</td>
<td>Month 12</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>
7. MEASURES OF SUCCESS, ASSESSMENT AND MODIFICATION

| a. While this is listed last because it is an ongoing effort, measures of success should be discussed early on. Personalized Learning Steering Committee should make recommendations on what the region will measure, assess and suggest a plan for modification, if needed. | Month 5-7 and ongoing |

| TOTAL |  |  |  | $550,000 | $65,000 |

**Committee**
V. REGIONAL TECHNOLOGY PLAN

VISION

All students in Northeastern Minnesota will have equal access to a high quality education, regardless of which school or campus they attend. They will have the technology and resources to access a variety of courses and content within and outside their school or campus, explore the world via the Internet anywhere, anytime, and demonstrate their knowledge in multi-media formats.

Students will be engaged in and help direct their own learning and pursue topics of interest to them. They will utilize 21st Century Skills such as collaboration, communication, critical thinking and problem solving. Learning will be maximized and personalized through the use of technology. Students will be able to use and demonstrate core technology competencies such as knowing how to effectively use search engines, blogs, Wikis and decipher credible sources of information.

Educators will be comfortable using technology to maximize learning and customizing to groups of students or individual students. They will be encouraged to explore and incorporate technology within the classroom. Educators will understand that it is okay for students to know more than they do in technology applications and embrace the opportunity for students to become the teacher.

School districts will have the broadband and infrastructure needed to support high-speed, consistent connectivity with uninterrupted service and support 1:1 devices running simultaneously. With a common platform, districts will be able to share staff resources and benefit from cost savings.

DEFINITION

Education Innovation Partners’ Regional Technology Plan will ensure all students have the same opportunities to enhance their learning with technology and be prepared to enter post-secondary education and/or a career of their choice with the knowledge and skills they need. The goal is to supplement and bring classroom instruction to life through the effective and engaging use of technology; provide a common core of

All students in Northeastern Minnesota will have equal access to a high quality education, regardless of which school or campus they attend.
technology-specific learner outcomes, and support individualized learning and teaching, learning and leadership initiatives.

School districts and college campuses will benefit from efficiencies, cost savings and shared curriculum. By having a common platform and sharing resources, districts also will have a more sustainable technology plan.

This comprehensive Regional Technology Plan consists of these key components:

- Leadership
- Broadband Connectivity
- Infrastructure
- Instruction and Core Competencies
- Personal Learning Devices
- Distance Learning Technology
- Professional Development
- Measures of Success and Assessment

**SITUATION ANALYSIS**

Education Innovation Partners districts and campuses are at different stages with their own technology plans and have varying levels of technology support. Through regional focus groups, superintendents, board members and EIP cabinet members expressed a desire to have a compatible technology platform. Investments in technology can be substantial and the tools are changing quickly. However, the benefits of a regional technology plan, especially related to improving student achievement and short- and long-term cost savings, are significant.

Project Red conducted an extensive research study and reported its findings in *The Technology Factor: Nine Keys to Student Achievement and Cost-Effectiveness*. The nine key implementation factors linked most strongly to education success include:

1. **Intervention classes:** Technology is integrated into every intervention class period (Title I, special education, reading intervention programs).
2. **Change management leadership by principal:** Leaders provide time for teacher professional learning and collaboration at least monthly.
3. **Online collaboration:** Students use technology daily for online collaboration (games/simulations and social media).
4. **Core subjects:** Technology is integrated into core curriculum weekly or more frequently.
5. **Online formative assessments:** Assessments are done at least weekly.
6. **Student-computer ratio:** Lower ratios improve outcomes.
7. **Virtual field trips:** With more frequent use, virtual field trips are more powerful. The best schools do them at least monthly.

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8. **Search engines**: Students use daily.
9. **Principal training**: Principals are trained in teacher buy-in, best practices, and technology-transformed learning.

These factors should be incorporated in the implementation of the Regional Technology Plan.

**Desired Outcomes**

Regional and national research suggests that desired outcomes for a regional technology plan include but are not limited to:

**Students:**

- Students can extend and customize their learning beyond the classroom by being able to access information and resources anywhere and at any time.
- Students will be more engaged in their learning because they can pursue topics of interest to them and demonstrate knowledge through multi-media formats.
- Students can access the courses they want and need to take within and outside their school district.
- Students will embrace technology to pursue life-long learning.
- Students will be digital natives and can demonstrate core technology competencies needed for post-secondary education and/or the career of their choice.

**Educators:**

- Educators will embrace technology to maximize learning and customize to groups of students or individual students through ongoing professional development at the Teaching, Learning and Leadership Academy.
- Educators will be empowered to explore and incorporate technology within the classroom.
- Educators will be comfortable with and encourage students to help teach new concepts or demonstrate applications using technology.
- Educators can focus on teaching and continuous learning because districts will have sufficient bandwidth and wireless connections, and the network and application support to ensure minimal downtime and technology frustrations.
- Educators will have easy access to content and resources to maximize their teaching and have a network of professionals to share content with through the TLLA.

**Administrators:**

- Administrators will be part of a regional technology system that is cost-effective and allows for sharing of resources across EIP school districts and college campuses.
- Administrators will have an implementation and sustainability plan to ensure the longevity of this initiative.
RECOMMENDATIONS

There are some fundamental decisions that EIP Leadership will need to make early on to fulfill the regional technology plan vision and ensure successful implementation and sustainability.

Process:

1. **Hire a regional technology manager.**

   *Rationale:* There are many components involved in refining the regional technology plan, and the short-term and long-term investments are significant. Many districts already have made significant investments in specific technologies while others have not. Most districts are at different starting points with technology, but the goal is to get them to the same end point. Many district IT people are at capacity ensuring their own district’s needs.

   Vendors that responded to the EIP Regional Technology Plan RFQ stressed the importance of having one central point of contact to represent the region’s needs. A regional technology manager will help lead, coordinate and implement this initiative to ensure its initial success and sustainability. This person should be a neutral third party to represent the needs of all districts and campuses and not be affiliated with a specific vendor that may directly benefit from purchases.

2. **Establish a Regional Technology Steering Committee to guide assessment and implementation. Members should include:**

   - At least one EIP Cabinet member to ensure communication between the groups
   - Regional Technology Manager
   - Two IT people representing districts of different sizes
   - A local representative of Education Minnesota
   - At least three teachers, including representatives from elementary, middle and high school
   - Two curriculum directors representing districts of different sizes
   - Two technology-savvy high school students
   - One higher education IT person

   *Rationale:* Educators and IT personnel need to collaborate on educational technology and determine how technology can best meet identified desired outcomes. Educators and students can contribute to user experience and technology professionals can find potential resources and determine how best to implement.

3. **Determine long-term solution for broadband connectivity across all EIP districts.**
**Rationale:** To gain the most cost efficiencies and have a consistent platform to support, EIP districts should determine one common fiber provider. By September 2013, almost all EIP schools will be connected to broadband fiber. Currently, IASC schools have a 1 GIG connection with 100 MB at each school and are on a three-year contract with the Minnesota Office of Enterprise Technology (OET). Most other schools have a 100 MB connection at each school and are on a ten-year contract with Northeast Service Cooperative (NESC).

**EIP will need to decide:**

- Should all schools and campuses within EIP use one broadband provider?
- If so, should all schools and campuses connect using current providers or find a new provider?

4. **Ensure all districts have the infrastructure needed to provide consistent, continuous access for multiple devices running simultaneously.**

**Rationale:** This is the “second layer,” after broadband connectivity, that needs to be addressed to meet the goal of providing equal access to students and allowing them to have 24/7 internet access to meet desired outcomes.

**EIP will need to decide:**

- Should all schools and campuses within EIP have one common data center?
- If so, where should it be located? Co-location data center such as Involta in Duluth, an already established data center such as Grand Rapids, build or find another location? Cloud storage?

4.a. **Complete a detailed assessment of all EIP districts’ infrastructure.**

**Rationale:** Various vendors have done assessments at different points in time for specific technology solutions. A third-party assessment should be conducted to attain a current and comprehensive assessment.

4.b. **Seek competitive bids from vendors to refine placeholder cost estimate.**

**Rationale:** The regional technology manager should seek competitive bids and refine the placeholder cost estimate.

4.c. **Determine potential funding partners and seek funding.**

**Rationale:** There are many grants and various sources of funding available. A partial list of potential funding partners and sources is included in the Appendix.

4.d. **Develop an implementation plan.**
5. Develop a plan for maximizing teaching and learning with technology in the classroom and determine core technology competencies for students.

Rationale: Devices alone won’t transform learning with technology. Educators need to know how to effectively embed technology in core curriculum. There needs to be a plan guiding the incorporation of the SAMR model (substitution, augmentation, modification, redefinition) to reach the highest level of learning and the best investment in technology. Ongoing district-level communications and professional development through the Teaching, Learning and Leadership Academy are essential to defining goals, expectations, showcasing best practices, and providing support.

There also need to be consensus and a recommendation on core technology competencies for all students. The National Education Technology Standards (NETS) provides a benchmark of standards for evaluating the skills and knowledge students need to learn effectively and live productively in an increasingly global and digital world. According to NETS, “technology has forever changed not only what we need to learn, but the way we learn. Simply being able to use technology is no longer enough. Today’s students need to be able to use technology to analyze, learn, and explore. Digital age skills are vital for preparing students to work, live, and contribute to the social and civic fabric of their communities.”

5.a. Conduct an electronic survey to gather information about educators technology skills and infusion of technology practices within their classroom and what core technology competencies they believe students should have.

Rationale: Data can be used to spotlight faculty strengths/best practices and professional development opportunities.

5.b. Begin to showcase individual examples of educators using technology to maximize teaching and learning.

Rationale: Showcasing colleague best practices will create a culture of innovation and inspire others to discover, experiment and implement within their classrooms.

5.c. Develop an implementation plan for maximizing teaching and learning with technology in the classroom and core technology competencies for students.

Rationale: The Regional Technology Steering Committee should recommend a plan for communicating with educators and provide professional development course recommendations to TLLA specific to technology to ensure technology is being embedded.

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into all courses. The plan should also include a recommendation on core technology competencies for students.

Product:

6. **Provide a recommendation on personal learning devices.**

*Rationale:* Research shows that the closer the student to computer ratio comes to 1:1, the better the outcomes, as long as key implementation factors identified by Project Read (Situation Analysis, page 2) are implemented. In 2013, the number of people accessing the Internet via mobile surpassed desktop. Many research reports show that the trend is toward mobility, cloud and video. Personal learning devices allow students to discover, collaborate, explore, and access information anytime, anywhere. Even those who do not have Internet at home are able to access assignments by downloading prior to leaving school. Free video and chat tools also allow students to collaborate “in person.”

Personalized learning devices are essential to fulfilling the vision of EIP’s Personalized Learning initiative.

Teach Thought has identified 12 principles of mobile learning.\(^{18}\) These principles should be considered as the Regional Technology Steering Committee forms their recommendation.

1. **Access:** A mobile learning environment is about access to content, peers, experts, portfolio artifacts, credible sources, and previous thinking on relevant topics. Access is constant—which in turn shifts a unique burden to learn on the shoulders of the student.
2. **Metrics:** As mobile learning is a blend of the digital and physical, diverse metrics (i.e., measures) of understanding and “performance of knowledge” will be available.
3. **Cloud:** The cloud is the enabler of “smart” mobility. With access to the cloud, all data sources and project materials are constantly available.
4. **Transparent:** Transparency is the natural byproduct of connectivity, mobility, and collaboration. As planning, thinking, performance, and reflection are both mobile and digital, they gain an immediate audience with both local and global communities through social media platforms.
5. **Play:** Play is one of the primary characteristics of authentic, progressive learning, both a cause and effect of an engaged mind. In a mobile learning environment learners are encountering a dynamic and often unplanned set of data, domains, and collaborators, changing the tone of learning from academic and compliant to personal and playful.

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6. **Asynchronous:** Among the most powerful principles of mobile learning is asynchronous access. This unbolts an educational environment from a school floor and allows it to move anywhere, anytime in pursuit of truly entrepreneurial learning. It also enables a learning experience that is increasingly personalized: *just in time, just enough, just for me.*

7. **Self-Actuated:** With asynchronous access to content, peers, and experts comes the potential for self-actuation. Here, learners plan topic, sequence, audience, and application via facilitation of teachers who now act as experts of resource and assessment.

8. **Diverse:** With mobility comes diversity. As learning environments change constantly, that fluidity becomes a norm that provides a stream of new ideas, unexpected challenges, and constant opportunities for revision and application of thinking.

9. **Curation:** By design, mobile technologies adapt to learners, store files, publish thinking, and connect learners, making curation a matter of process rather than ability.

10. **Blending:** A mobile learning environment will always represent a blending of physical movement, personal communication, and digital interaction.

11. **Always-On:** Always-on learning is self-actuated, spontaneous, iterative, and recursive. There is a persistent need for information access, cognitive reflection, and interdependent function through mobile devices. It is also embedded in communities capable of intimate and natural interaction with students.

12. **Authentic:** All of the previous 11 principles yield an authenticity to learning that is impossible to reproduce in a classroom. They also ultimately converge to enable experiences that are truly personalized.

**6.a. Using the desired outcomes and principles of mobile learning, recommend which personal learning device will become the standard across districts.**

*Rationale:* To meet the goal of providing equal access and equal opportunity, a common device should be implemented across the region.

**6.b. Provide a recommendation on a display system to integrate with personal learning devices.**

*Rationale:* Some educators have projection tools such as Smart Boards or flat screen television displays in their classrooms and others do not. To level the playing field and to ensure educators have the tools to demonstrate and collaborate, the Regional Technology Steering Committee should provide a recommendation on display systems.

**6.c. Seek competitive bids from vendors to refine placeholder cost estimate.**

*Rationale:* The regional technology manager should seek competitive bids and refine the placeholder cost estimate.
6.d. **Determine potential funding partners and seek funding.**

*Rationale:* There are many grants and various sources of funding available. A partial list of potential funding partners and sources is included in the Appendix.

6.e. **Develop an implementation plan.**

*Rationale:* The regional technology manager should develop an implementation plan to ensure EIP leadership approves final costs, timeline, responsibilities and that communication loops are maintained.

7. **Provide a recommendation on distance learning and collaboration technology.**

*Rationale:* Education Innovation Partners wants to ensure that all students can access classes not offered in their own district. They can take an elective from another EIP district or campus or connect with the world. Connecting and collaborating via video communications technology is growing and evolving at a rapid pace and educators and students can easily access content, courses, peers and places from around the world. The convergence of video communication technology with interactive content takes the classroom virtually anywhere. Students can participate in virtual field trips with many organizations such as parks, aquariums, museums and higher education institutions that are rapidly developing and providing these offerings.

Some of the districts and campuses in EIP invested early in videoconferencing technology and are ahead of the curve, while others are determining solutions that will best meet their needs. With the increasing mobility of devices and free video collaboration software and chat rooms, there are many options than ever before for delivering distance learning and providing collaboration opportunities. Even within the last month, there have been several video communication product announcements.

*As EIP moves forward, it will be important to review trends in videoconferencing and mobility and evaluate need, one-time and maintenance costs, and quality and instructional effectiveness. Because the solutions for this technology vary from virtually free (with a mobile device and connectivity) to $300,000-plus, it’s important to review the trends.*

**Trends:**
According to an article in PC World, “New, high-powered mobile devices, which put sharp screens and fast processing in the hands of employees nearly everywhere, represent the biggest growth opportunity for videoconferencing. Analysts expect the market for room-sized meeting systems to grow slowly over the next few years because of high costs and space requirements.”

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Also, major players in the telepresence industry are moving toward cloud-based solutions. Video is coming into more enterprises as a communication tool even while more employees are relying on mobile devices. Cisco, Polycom and other vendors have committed themselves to reaching those mobile users with video, a task that requires the content to be adapted to different screen sizes and processing capabilities.²⁰

In addition, an article in Forbes describes how technological breakthroughs, from mobile networks and devices to new powerful video technologies, will disrupt the market.²¹

- **Cost:** Entrants into the videoconferencing space are offering similar quality high-definition video for a fraction of the price of established telepresence providers. A similar quality setup using the latest video codecs now costs one-tenth of the price, while maintaining the look and feel of being in the same place as other meeting attendees. This is equivalent to a 90% cost savings.

- **Cloud:** With cutting edge software being hosted in the cloud, all of the IT work is done remotely by the service provider. This makes the entire system much easier to use and much less costly over the long run. In addition, by having videoconferencing in the cloud, online video meetings are kept persistent (even if the host drops off) and can be easily recorded and stored for later review. This creates greater accountability of meeting information, more secure storage and the elimination of additional in-house technical resources.

- **Mobile:** Mobile devices have become powerful enough to support HD videoconferencing and content can be delivered to any employee on any device, be it in the boardroom or desktop or tablet or smartphone, making the dedicated room not necessary.

- **Interoperability:** Newcomers to the game are providing software workarounds, called gateways, to make it possible for any system to connect with another.

- **Collaboration:** Videoconferencing providers are now realizing that video is not enough; there must be added functionality for real-time sharing, annotation and content viewing. This includes documents, video, audio, images and graphics, with the ability to annotate and markup, as well as the ability to embed presentations. New mobile apps and services are making productivity even greater.

Also, free group video calling services are increasing. In March 2013, Skype announced a new free group video calling for teachers.²² This technology provides the opportunity for classrooms to beam in authors, subject experts, and fellow students from around the world.

**Best Practices for Maximizing Video Conferencing Value in the Classroom:** According to an article in EdTech, there are five best practices that will maximize video conferencing’s value in

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These best practices should be reviewed by the Regional Technology Steering Committee as they formulate their implementation plan.

1. **Equip Carefully:** The options are endless and growing. Seek advice on areas such as bandwidth requirements, firewall transversal, audio and video quality, connection reliability, ease of use, deployment and integration. Determine whether the equipment will be stationary or mobile; whether your school plans to connect with one site (point-to-point) or many sites (multipoint) at a time; and whether other features would enhance the experience.

2. **Train Effectively:** As with any technology initiative, professional development is key. It’s important to provide basic operational and troubleshooting training for teachers. Educators and students should be taught proper video conferencing etiquette. Understanding voice-activated systems and muting microphones can keep the program on track — especially when multiple school sites are connected.

3. **Choose Content Wisely:** There are many ways that video conferencing can be used in the classroom. Low- and no-cost ways to connect students and teachers include:
   - **Collaborations:** Add a new dimension to projects by working with other schools to connect students and teachers face to face — locally, nationally and around the world.
   - **Guest Lecturers:** Invite experts with whom students otherwise might not get to interact to share their expertise and experiences.
   - **Student Competitions:** Organize a district wide or statewide spelling bee or geography bee via video conference, for example.
   - **Virtual Field Trips:** Reach out to aquariums, zoos, museums, libraries and other organizations to learn about the distance learning programs they offer.
   - **Professional Development:** Make it easy for teachers in different schools to participate in training activities by conducting those sessions via video conference, rather than asking everyone to drive to one location.

4. **Schedule Strategically:** Most schools that have had long-term success with video conferencing have a system for scheduling programs that is coordinated through one person.

5. **Consider All Options:** Dedicate time to learning about the technology, how other educators are using it, and how to build an effective distance or blended learning program. Webinars, streaming video and desktop video or Skype, as well as a variety of interactive Web 2.0 tools, can be combined with two-way interactive video conferencing to create media-rich learning experiences for teachers and students.

7.a. **Conduct an electronic survey to determine how many classes are currently being taught using distance learning and the format (lecture, collaboration) and number of participants.**

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7. **Rationale:** Determine the current demand and usage of distance learning technology.

7.b. **Conduct an electronic survey of high school students, counselors and curriculum directors to determine what the demand is for particular courses.**

**Rationale:** Determine the potential demand and usage of distance learning technology.

7.c. **Create a matrix of demand for courses, where they are currently being offered and who might be available to teach. From there determine what technology will best meet the needs of various course offerings.**

**Rationale:** Understand the true potential demand of distance learning technology and use this as a benchmark for determining what type of distance learning technology will best meet the need – mobile personal learning devices with free connectivity, mobile videoconferencing stations, or designed pre-built rooms.

7.d. **Develop a common calendar and class period schedule across EIP districts.**

**Rationale:** One of the biggest barriers to fully integrating distance learning is not having a common calendar or class schedule. This needs to be discussed and determined so as not to limit opportunities for students to take courses.

7.e. **Seek competitive bids from vendors to refine placeholder cost estimate.**

**Rationale:** The regional technology manager should seek competitive bids and refine the placeholder cost estimate.

7.f. **Determine potential funding partners and seek funding.**

**Rationale:** There are many grants and various sources of funding available. A partial list of potential sources is included in the Appendix.

7.g. **Develop an implementation plan.**

**Rationale:** The regional technology manager should develop an implementation plan to ensure EIP leadership approves final costs, timeline, responsibilities and that communication loops are maintained.

8. **Provide recommendations on professional development to support implementation of 1:1 devices and teaching with technology.**

**Rationale:** Significant ongoing, professional development is needed for educators to embrace technology and move along the SAMR model. In addition, having the opportunity to “play with” technology and discover on their own will make them more comfortable and likely to use technology.
9. **Identify potential measures of success and a plan for assessing and modifying, if necessary.**

*Rationale:* It is important to identify potential measures of success before implementing this initiative and having a clear plan for assessment and modification. Some of the potential criteria will be easier to measure than others.

These may include but are not limited to:
- Long-term regional technology cost savings
- Improved efficiencies and reduced paperwork
- Student graduation rates
- Student attendance
- Student engagement
- Teacher engagement
- Increased access for students; number of completed distance learning courses
- Post-secondary joint enrollment

**ROADMAP AND COST PLACEHOLDERS**

A regional technology roadmap and cost placeholder spreadsheet is attached. The roadmap identifies specific tasks to be completed as part of each recommendation, the timeframe, outcome/result, potential one-time and annual expenses and responsibility assignments.

**Cost Placeholder Notes:**

A Technology RFQ was created and submitted to a number of potential technology partners. Partners were provided with some basic assumptions about the number of students, broadband connection, etc. and were told that for cost placeholder purposes to assume the regional technology system is being built from the “ground up” and that high-level ballpark budgets are acceptable and that a full assessment would be conducted at a later point in time.

Project management advisors had conversations with a number of potential technology partners, which helped significantly in building recommendations. A few chose not to formally respond without having all the answers but welcomed a conversation at a later date.

Project management advisors are not recommending a specific technology partner but are providing a roadmap for determining a solution.
## PROCESS RECOMMENDATIONS

### 1. HIRE A REGIONAL TECHNOLOGY MANAGER

**a. Convene EIP Cabinet to agree on the skills, qualifications and job description for a technology manager.**

<table>
<thead>
<tr>
<th>Timing</th>
<th>Outcome/ Result</th>
<th>One-time expense</th>
<th>Estimate</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 1</td>
<td>Job Description</td>
<td>$0</td>
<td>$0</td>
<td>Cabinet</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**b. EIP Cabinet advertises position, reviews candidate resumes, interviews semi-finalists and hires finalist.**

<table>
<thead>
<tr>
<th>Timing</th>
<th>Outcome/ Result</th>
<th>One-time expense</th>
<th>Estimate</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Months 2-3</td>
<td>Manager is hired</td>
<td>Ads in newspapers, websites</td>
<td>$1,000</td>
<td>$90,000</td>
<td>Cabinet</td>
<td></td>
</tr>
</tbody>
</table>

### 2. REGIONAL TECHNOLOGY STEERING COMMITTEE

**a. EIP Cabinet creates Regional Technology Steering Committee. Membership includes: 1 EIP Cabinet member; Regional Technology Manager; 2 IT people; 1 local representative from Education Minnesota; 3 teachers representing elementary, middle and high school; 2 Curriculum Directors; 2 tech-savvy high school students; 1 higher education IT person**

<table>
<thead>
<tr>
<th>Timing</th>
<th>Outcome/ Result</th>
<th>One-time expense</th>
<th>Estimate</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month 4</td>
<td>Regional Technology Steering Committee formed</td>
<td>$0</td>
<td>$0</td>
<td>Cabinet, Manager</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**b. Using the Regional Technology Plan Roadmap, create detailed annual work plan for Administrator, Technology Manager, other staff, and project management advisors**

<table>
<thead>
<tr>
<th>Timing</th>
<th>Outcome/ Result</th>
<th>One-time expense</th>
<th>Estimate</th>
<th>Annual expense</th>
<th>Estimate</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Months 5-7</td>
<td>Detailed Work Plan</td>
<td>$0</td>
<td>$0</td>
<td>Manager, Regional Technology Steering Committee</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 3. BROADBAND CONNECTIVITY
a. Regional Technology Committee recommends connectivity plan to EIP Cabinet

<table>
<thead>
<tr>
<th>Months</th>
<th>Fiber to connect NESC and IASC</th>
<th>$1,260,000</th>
<th>$0</th>
</tr>
</thead>
<tbody>
<tr>
<td>5-7</td>
<td></td>
<td>Manager, Regional Technology Steering Committee</td>
<td></td>
</tr>
</tbody>
</table>

4. INFRASTRUCTURE

- **a. Complete a detailed assessment of all EIP districts' infrastructure.**
  - Month 4
  - Assessment of infrastructure

- **b. Seek competitive bids from vendors to refine placeholder budget.**
  - Month 5-6
  - Common wireless, switching, cabling, installation, data center
  - $8,000,000
  - Annual maintenance fees
  - $250,000
  - Manager

- **c. Determine potential funding partners and seek funding**
  - Months 5-9

- **d. Develop an implementation plan**
  - Months 9-12
  - Manager, Regional Technology Steering Committee

5. TEACHING AND LEARNING WITH TECHNOLOGY AND CORE COMPETENCIES
### 6. PERSONAL LEARNING DEVICES

<table>
<thead>
<tr>
<th>Task</th>
<th>Time frames</th>
<th>Budget</th>
<th>Responsible Parties</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Using the desired outcomes and principles of mobile learning, recommend which personal learning device will become the standard across districts.</td>
<td>Months 10-11</td>
<td>$0</td>
<td>Manager, Regional Technology Steering Committee</td>
</tr>
<tr>
<td>Task Description</td>
<td>Months</td>
<td>Cost</td>
<td>Responsible Party</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>--------------</td>
<td>---------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>b. Provide a recommendation on a display system (smart boards, flat screen panels) to integrate with personal learning devices.</td>
<td>10-11</td>
<td>$1,500,000</td>
<td>Manager, Regional Technology Steering Committee</td>
</tr>
<tr>
<td>c. Seek competitive bids from vendors to refine placeholder cost estimates for 1:1 devices and display systems.</td>
<td>12-13</td>
<td></td>
<td>Manager, Regional Technology Steering Committee</td>
</tr>
<tr>
<td>d. Determine potential funding sources and seek funding.</td>
<td>10-14</td>
<td>$13,000,000</td>
<td>Manager</td>
</tr>
<tr>
<td>e. Develop an implementation plan.</td>
<td>14-18</td>
<td>$2,000,000</td>
<td>Manager, Regional Technology Steering Committee</td>
</tr>
</tbody>
</table>

**7. DISTANCE LEARNING TECHNOLOGY**

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Months</th>
<th>Cost</th>
<th>Responsible Party</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Conduct an electronic survey to determine how many classes are currently being taught using distance learning and the format and number of participants.</td>
<td>10-11</td>
<td>$0</td>
<td>Manager, Regional Technology Steering Committee</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Months 10-11</td>
<td>Input from high school students and counselors</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>-------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>b. Conduct an electronic survey of high school students, counselors and curriculum directors to determine what the demand is for particular courses.</td>
<td></td>
<td>Months 10-11</td>
<td>Input from high school students and counselors</td>
</tr>
<tr>
<td>c. Create a matrix of demand for courses, where they are currently being offered and who might be available to teach. From there determine what technology will best meet the needs of various course offerings.</td>
<td></td>
<td>Months 12-13</td>
<td>Course matrix</td>
</tr>
<tr>
<td>d. Develop a common calendar and class period schedule across EIP districts.</td>
<td></td>
<td>Months 14-18</td>
<td>Common calendar</td>
</tr>
<tr>
<td>e. Seek competitive bids from vendors to refine placeholder cost estimate.</td>
<td></td>
<td>Months 14-18</td>
<td>Common calendar</td>
</tr>
<tr>
<td>f. Determine potential funding partners, seek funding and purchase equipment.</td>
<td></td>
<td>Months 14-18</td>
<td>Purchase of videoconferencing equipment</td>
</tr>
</tbody>
</table>

### 8. PROFESSIONAL DEVELOPMENT

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Month 10-11</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Provide recommendations on professional development to support implementation of 1:1 devices and teaching with technology.</td>
<td></td>
<td>Month 10-11</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 9. MEASURES OF SUCCESS, ASSESSMENT AND MODIFICATION

a. While this is listed last because it is an ongoing effort, measures of success should be discussed early on. Regional Technology Committee should make recommendations on what the region will measure, assess and suggest a plan for modification, if needed.

<table>
<thead>
<tr>
<th>Month</th>
<th></th>
<th></th>
<th></th>
<th>Manager, Regional Technology Steering Committee</th>
</tr>
</thead>
<tbody>
<tr>
<td>5-7 and ongoing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td></td>
<td>$26,261,000</td>
</tr>
</tbody>
</table>
VI. Report Methodologies

Vision

A set of recommendations for implementing the Regional, Integrated Learning Model that is reflective of the opinions and aspirations of a variety of stakeholders throughout the region and that, when implemented, will achieve the vision of the model and generate ongoing support among all stakeholders.

Situation Analysis

In July 2010, a group of regional superintendents and provosts met to begin to explore how to build an educational system in Northeastern Minnesota that is among the best in the world. After six working sessions, the group christened itself Education Innovation Partners (EIP) and issued the following call to action in May 2011:

We call upon the educational and community leaders of Northeast Minnesota, in partnership, to embark on an immediate undertaking to proactively build a homegrown, integrated learning system that provides the 21st Century education deserved by the youth and adult learners of this region.

In March 2012, EIP identified three initiatives to be the first explored as part of developing a Regional, Integrated Learning Model. Project management advisors were hired in November 2012 to solicit stakeholder input that would be incorporated into a roadmap for implementing the three initiatives.

The Call for Proposal for the contract to develop this plan was clear in the expectations:

This contract will specifically focus on the convening and facilitation of regional conversations with key stakeholder groups to gather feedback and input on three initiatives: individualized learning plans, teaching and learning academies for educators, and a regional technology plan. The conversations and information gathering will lead to the development of specific action plans in the aforementioned areas.
Project management advisors implemented a number of tactics to solicit, collect and analyze input from a variety of stakeholders to ensure the greatest possible breadth and depth of input and to ensure the recommendations contained in this roadmap reflect the desires of stakeholders.

What follows is a description of the processes and methodologies the project management advisors used to generate broad and deep stakeholder input that shaped, informed and, in many cases, directed the recommendations contained in this report.

**PREPARATION**

Project management advisors studied numerous reports, meeting notes and other background information to develop a detailed work plan designed to generate additional data to support the recommendations contained in this report. Those reports and meeting materials informed the work plan. They include:

- A Strategic Enterprise for the Future, Arrowhead Institute of Technology, Sertich Consulting
- Northeast Minnesota’s Education Innovation Consortium 21st Century Learning Solution, grant application, August 29, 2012
- Meeting notes from meetings of Education Innovation Partners

**STAKEHOLDER ENGAGEMENT**

**Summary:**

Stakeholder involvement, engagement and, ultimately, ownership are key to the implementation and ongoing success of EIP’s Regional, Integrated Learning Model. Without the ideas, dreams and passion of stakeholders, the initiatives will lose momentum and never realize the dream of equal to educational opportunities, increased learner achievement and unlimited opportunities for all learners in the region, including educators.
Given the timing and the timeframe of the contract, project management advisors identified several ways to solicit stakeholder input that would be incorporated into the final recommendations, including interviews, surveys, focus group meetings and small group meetings.

Each methodology offered a different type of data:

One-on-one interviews offered the opportunity to dig deeper into individual stakeholder’s opinions and what experiences and data influenced them.

Surveys allowed the project management advisors to tap the opinions of a large number of stakeholders, allowing comparisons among groups and also allowing most respondents the opportunity to provide additional information/commentary on individual questions.

Focus groups gave the project management advisors the opportunity to get good quantitative data from those in attendance, as well as qualitative data generated by the give-and-take of the meetings. In larger groups, the breadth of opinions of participants was collected. Smaller groups allowed for more exploration of what was behind the opinions.

Research offered a glimpse at best practices found in the U.S. and elsewhere, as well as more detailed information about specific initiatives.

Finally, several meetings with the EIP Cabinet and Leadership Council offered immediate feedback on proposed processes, etc.

LEADERSHIP COUNCIL INTERVIEWS

Using a list of detailed questions approved in advance by the EIP Cabinet to generate detailed responses, project management advisors interviewed 22 members of the EIP Leadership Council in telephone interviews that lasted from 30 to 60 minutes. The insights and opinions offered helped the project management advisors:

- Introduce themselves and their work plan in greater detail
- Paint a more nuanced picture of the 17 school districts and five community college campuses that comprise Education Innovation Partners
- Identify potential points of confusion that further research could help clarify
• Shape additional research, and
• Contribute to the recommendations contained in this report

The executive summary is included in the Appendix to this report.

**Highlights from Leadership Council Interviews:**

**Personalized Learning:**

- Desired outcomes from Personalized Learning Plans are that students will have a roadmap early on, learners will be able to think critically and creatively and students will be engaged and connected to their learning.

- Regional benefits include that if districts agree to a common template, the plan can follow transferring students; a regional snapshot of student interests can tailor offerings and curriculum across the region and data collected could identify regional trends.

**Teaching, Learning and Leadership Academy:**

- Desired learner outcomes are higher student achievement because teachers will learn best practices from each other, both in core academic areas and soft skills.

- Regional benefits include best practices shared across region, pooling of resources, leveraging the number of districts and identifying regional interests and needs.

**Regional Technology Plan:**

- Starting with learner outcomes and needs will drive the selection of technology, technology can provide greater access to course offerings and technology is an additional tool to interact and engage with students.

**FACT-FINDING TRIP**

Project management advisors organized a three-plus-day fact finding trip to Cisco and Apple for superintendents and others to see first-hand how technology could be used to help achieve the objectives of the Model. Both companies provided insights into the potential future for technology and also demonstrations of how their products could be used to enhance learner access and outcomes. The information gathered informed development of a Request for Qualifications, as well as the recommendations themselves.

**Highlights from fact-finding:**

- **Visits to both companies and Stanford University stressed that technology—in general and via specific devices and software—can support mobility, interactivity, collaboration and differentiated learning.**

**ONLINE SURVEYS**

The results of all online surveys are included as attachments to this report.

**Parent Survey:**

A short survey identified outcomes parents deemed most important for the first three initiatives. EIP superintendents notified parents of the availability of the survey, and nearly 670 parents took part. The detailed report of parents’ responses is included as an attachment to this report.

In addition to gaining valuable insight into parents’ priority expectations, the survey introduced this important stakeholder group to Education Innovation Partners and its Regional, Integrated Learning Model – as well as an explanation of the three initiatives chosen to first begin implementing the model.

**Highlights from the Parent Survey:**

- **Parents' top priority for a Personalized Learning Plan was providing their children with a roadmap of courses to take to prepare for higher education and a potential career.**
Parents’ top priority for a Teaching, Learning and Leadership Academy was that their children’s teachers would be able to stay up-to-date on the most current teaching methods to engage their children.

Parents’ top priority for a Regional Technology Plan was that their children would have access to technology tools necessary for today’s learners to acquire skills necessary to succeed in the 21st Century.

Northeast Higher Education District (NEHED) Faculty Survey:

Faculty from the district’s five campuses responded to an online survey link sent by provosts to rank outcomes from the initiatives, suggest the best ways to implement them and to raise potential concerns. About three-quarters of the 85 faculty members who participated were full-time and nearly one-third had been teaching for 20 years or more.

Highlights from NEHED Survey:

- Respondents’ top priority for Personalized Learning Plans was that students would be more involved with their learning, setting goals and tracking progress beyond standardized tests, and about 40% of respondents hoped that students would arrive at college better prepared for their intended major.

- Respondents’ top priority for a Teaching, Learning and Leadership Academy was that faculty at all levels would have readily accessible, ongoing opportunities to improve teaching for students at all learning levels and abilities, and almost 30% identified the value of meeting with community college colleagues in their content area as being useful.

- Respondents’ top priority for a Regional Technology Plan was that students wouldn’t be limited by geography but would have access to a wide array of information sources at home and at school and 25% indicated the most useful thing about a plan would be that students would come to community college classes with a greater understanding of how to use technology to access and judge the quality of information available via the Internet.

PreK-12 Teachers’ Survey:
More than a third of the 540 teachers responding had been teaching for more than 20 years and nearly 65% had a master’s degree or had completed coursework toward a master’s degree. Their survey responses also ranked outcomes from the initiatives and allowed faculty to suggest the best ways to implement the initiatives and also raised concerns about the implementation of the initiatives.

**Highlights from PreK-12 Teachers’ Survey:**

- Responding teachers said their priority outcome for a Personalized Learning Plan would be that students would be more involved with their learning, setting goals and tracking progress beyond standardized tests, and nearly 40% indicated the most useful thing would be an easily accessible, electronic record of the student’s progress in prior grades that provides a complete representation of the student – test scores, academic planning, interests, strengths and needs.

- Responding teachers said the priority outcome for a Teaching, Learning and Leadership Academy was readily accessible, ongoing opportunities to improve teaching for students at all learning levels and abilities, and nearly a third said the most useful thing would be helping them connect with other educators, creating work groups of educators who share a passion for a grade level or for content and allowing them to share best practices and mentor each other.

- Responding teachers said the priority outcome for a Regional Technology Plan would be that students would have access to technology tools necessary for today’s learners to acquire skills necessary to succeed in the 21st Century; more than 40% said training for educators on how to use technology in their core curriculum was most important for the success of a technology plan.

**Principals’ Survey:**

Superintendents provided a link for principals to access the survey, and 36 principals participated. About 40% were principals at schools with enrollment between 200 and 400 students; all had completed master’s degrees plus additional coursework.

**Highlights from Principal Survey:**

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Responding principals said the most important outcome from a Personalized Learning Plan would be allowing faculty to monitor a student’s performance and progress over several years and to tailor instruction and interventions based on the cumulative knowledge about the student.

Responding principals said the most important outcome from a Teaching, Learning and Leadership Academy would be to access high quality, professional development close to home. A quarter of the respondents indicated a cohort of principals who pursue leadership training together would be useful.

Responding principals said the most important outcome of a Regional Technology Plan would be that students would have access to technology tools necessary for today’s learners to acquire skills necessary to succeed in the 21st Century and that the most useful element would be training for educators on how to use technology in the classroom to support student learning.

FOCUS GROUPS

The aggregated notes of all 20 hours of focus groups are included in the Appendix.

More than 75 community members, educators and students participated in 10, two-hour focus groups in three locations throughout the Range, including:

- Babbitt: Educator focus group
- Babbitt: Community focus group
- Mt. Iron: Higher Education focus group
- Mt. Iron: Student focus group
- Mt. Iron: preK-12 focus group
- Mt. Iron: Community focus group
- Marble: Student focus group
- Grand Rapids: Student focus group
- Grand Rapids: preK-12 focus group
- Grand Rapids: Community focus group

Sessions were designed to identify desired outcomes from each of the initiatives, as well as to raise concerns about any of the initiatives.
Highlights of the Focus Groups:

Personalized Learning:

- Children, parents, teachers involved in plans
- Mobile, easily accessible data that follows student
- Allows for differentiated instruction
- Concerned about implementation and time to enter data
- Concerned that behavioral issues not be included
- Concerned about sustainability over the long haul and across the region

Teaching, Learning and Leadership Academy:

- Create regional approach
- Share best practices across the region
- Create cohorts of educators
- Sustainability
- Needs to be ongoing training
- Accessibility – cost

Regional Technology Plan:

- Opportunities to use tools
- Pooling resource regionally
- Opening up learning to the world
- Concern that “technology is only a tool”
- Sustainability and upgrades
• *Time for training*

**RESEARCH**

Project management advisors conducted extensive research on the initiatives, including best practices, models and data, that is interwoven throughout the report and recommendations; the Research Basis is in the Appendix.

Research consisted of online research, interviews, personal contacts and the fact-finding trip to Cisco and Apple.
VII. APPENDICES

POTENTIAL FUNDING PARTNERS

Education Innovation Partners’ vision of a Regional, Integrated Learning Model offers potential funders a unique opportunity, which may be compelling on several fronts:

- EIP is a collaboration of 17 school districts and 5 community colleges working cooperatively toward common goals, while maintaining distinct identities.
- EIP is working to create a new era in education for a region that has experienced declining enrollments and a high percentage of poverty.
- With initiatives that focus on cutting-edge technology, as well as teacher development, EIP is both high-tech and high-touch.

EIP has a great story to tell and there are funders looking for innovative models that can inform and inspire other, similar undertakings.

A summary of potential partners and funding sources is below. It will take a dedicated grant writer to explore the potential for each of these opportunities.


Apple provides assistance with grant writing and offers an array of finance options including leasing.


In the United States, it seeks to ensure that all people—especially those with the fewest resources—have access to the opportunities they need to succeed in school and life. Based in Seattle, Washington, the foundation is led by CEO Jeff Raikes and Co-chair William H. Gates Sr., under the direction of Bill and Melinda Gates and Warren Buffett.


Goal: Increase by 50 percent the number of students in Minnesota, North Dakota and South Dakota, from pre-kindergarten through college, who are on track to earn a degree after high school, and eliminate disparities among diverse student groups.

But since 2007, the Foundation has been operating in a new way. Now we focus on creating partnerships with many types of organizations, including units of government, for-profit companies and sovereign tribal nations, as well as some nonprofits. We also partner with communities by offering fellowships to courageous individual leaders who are willing to take the bold steps needed to inspire and organize their communities to solve the tough problems they face.

Given this partnership model, we do not accept unsolicited proposals for traditional grantmaking. If your organization's mission coincides with ours, and if you have resources to commit toward a shared goal, then let us know


Our national grantmaking supports the revitalization of democracy by funding new pathways both to educational and economic opportunity; and to citizenship, civic participation and immigrant integration in a pluralistic society.


For cash grants, Cisco's Global and Community Impact Cash Grants support non-profit and non-government organizations working in the investment areas specified under each of those programs. For product grants, Cisco accepts unsolicited applications from a wide range of qualifying community organizations. Please note that all product grants are funded by Cisco corporate, not the Foundation.


Established in 1936, the foundation is an independent, global organization with a legacy of commitment to innovative leaders on the frontlines of social change.

We focus on strengthening educational systems to ensure all young people receive an education that enables them to engage in meaningful work and contribute as citizens in diverse societies. We work with organizations that produce compelling new thinking and evidence; promote effective and scalable practices; and communicate, advocate, and build the capacity for reform.

They invest in programs and services that increase economically disadvantaged children's access to high-quality educational opportunities. Their focus is on helping students enrolled in public K-12 schools acquire the knowledge and skills they need to become productive, engaged citizens.

They support:
1. Development of instructional leaders
2. Implementation of innovative curricula
3. Deepen teacher content knowledge
4. Strengthening of instructional strategies
5. Strengthening district capacity to support innovation
6. Extending learning opportunities
7. College access initiatives
8. Dissemination of best practices


Lumina Foundation believes that education provides the basis for individual opportunity, economic vitality and social stability. With its partners, Lumina strives to meet workforce demands and close gaps in attainment for groups not historically well-served by higher education. Lumina’s overarching goal is to increase the higher education attainment rate of the United States to 60 percent by 2025. This will represent an increase of 23 million graduates above current levels of production. While our mission focuses on both student access and success in higher education, our emphasis is on attainment, defined as completing associate and baccalaureate degrees and credentials.

Lumina Foundation’s grantmaking is primarily proactive in nature. In other words, a large majority of our grants are awarded to partners solicited by the Foundation based on unique capacity or position to leverage large-scale systemic change. We have allocated a modest amount of grant monies for unsolicited inquiries in an effort to encourage innovative ideas that relate to our strategic portfolio. Our proactive portfolio focuses on: increasing awareness of the benefits of higher education; improving student access to and preparedness for college; improving student success in college; and productivity across the higher education system.

MetLife Foundation was created in 1976 to continue MetLife’s longstanding tradition of corporate contributions and community involvement. The Foundation’s commitment to building a secure future for individuals and communities worldwide is reflected in its focus on **empowering older adults, preparing young people and building livable communities.**

**Preventing Young People:** By almost any measure, a good education is the best preparation for future success. Unfortunately, too many students are not gaining the required knowledge and skills to be competitive in today's global economy. *MetLife Foundation supports teacher effectiveness and school leadership initiatives to help ensure that every student leaves school both college- and career-ready.*

**Next Generation Learning Challenges**, http://nextgenlearning.org/

Next Generation Learning Challenges (NGLC) accelerates educational innovation through applied technology to dramatically improve college readiness and completion in the United States. NGLC is guided by the belief that providing investment capital to expand the use of proven and emerging learning technologies, collecting and sharing evidence of what works, and fostering a community of innovators and adopters will result in a robust pool of solutions and greater institutional adoption which, in turn, will dramatically improve the quality of learning experiences in the United States. Many potentially breakthrough solutions are being developed and tested by educators, institutions, technologists, and entrepreneurs, but too often they operate with little access to each other or to opportunities to disseminate their innovations. Support is needed to refine and rigorously test their solutions, to connect with other like-minded innovators, and to develop strategies to broaden their reach and impact.

Next Generation Learning Challenges (NGLC) announces a **Request for Proposals** (RFP) for two types of grants - Launch Grants and Planning Grants - from developers of new, whole-school, breakthrough schools at the secondary level (students within grades 6-12). NGLC’s $12 million Wave IV builds on the 20 new, personalized, blended secondary school models we helped to catalyze through Wave IIIa in 2012. With this new wave of investment, NGLC aims to further catalyze and accelerate the development of the blended learning model in secondary education. Our goal is to enrich the educational landscape with both a larger number and a more diverse portfolio of players innovating with blended learning approaches. NGLC aspires to find entrepreneurs and innovative organizations and agencies that share this urgency and recognize the potential of technology-enabled breakthrough school models to catalyze broad, transformative change across public K-12 education in the United States. NGLC will award 20 launch grants of $150,000 guaranteed plus up to $300,000 available in 1:1 matching funds and will award 30 planning grants of $100,000 each.

**New Schools Venture Fund**, http://www.newschools.org/

New Schools is a nonprofit venture philanthropy firm working to transform public education for low-income children. Through funding and guidance of entrepreneurial organizations, they aim to make sure every child receives an excellent education.


The Investing in Innovation Fund, established under section 14007 of the American Recovery and Reinvestment Act of 2009 (ARRA), provides funding to support (1) local educational agencies (LEAs), and (2) nonprofit organizations in partnership with (a) one or more LEAs or (b) a consortium of schools. The purpose of this program is to provide competitive grants to applicants with a record of improving student achievement and attainment in order to expand the implementation of, and investment in, innovative practices that are demonstrated to have an impact on improving student achievement or student growth, closing achievement gaps, decreasing dropout rates, increasing high school graduation rates, or increasing college enrollment and completion rates.

These grants will (1) allow eligible entities to expand and develop innovative practices that can serve as models of best practices, (2) allow eligible entities to work in partnership with the private sector and the philanthropic community, and (3) identify and document best practices that can be shared and taken to scale based on demonstrated success.

The U.S. Department of Education also recently announced the start of the $150 million 2013 Investing in Innovation (i3) grant competition today with the release of the program's invitation for pre-applications for the i3 "Development" grant category and the notice of final priorities for the i3 program overall.

This year's priorities for the Development grant category are: Improving the Effectiveness of Teachers or Principals; Improving Low-Performing Schools; Improving Science, Technology, Engineering and Mathematics (STEM) Education; Improving Academic Outcomes for Students with Disabilities; Improving Academic Outcomes for English Learners (ELs); Improving Parent and Family Engagement; Effective Use of Technology; and Serving Rural Communities.

**The deadline for the pre-application is April 26, 2013**


The Distance Learning and Telemedicine Loan and Grant Program (DLT) is designed specifically to meet the educational and health care needs of rural America. Through loans, grants and loan/grant combinations, advanced telecommunications technologies provide enhanced learning and health care opportunities for rural residents.

The Wallace Foundation, [http://www.wallacefoundation.org/learn-about-wallace/Pages/default.aspx](http://www.wallacefoundation.org/learn-about-wallace/Pages/default.aspx)

The Wallace Foundation is a national philanthropy that seeks to improve education and enrichment for disadvantaged children. The foundation has five key areas:

- **School Leadership:** Strengthening the leadership of principals and other key figures to improve student achievement.
- **After School:** Helping cities improve access to high-quality after-school programs through coordinating the work of government agencies, private funders, nonprofits and others groups.
- **Summer and Extended Learning Time:** Supporting school district and other efforts to expand learning time during summer and the school day or year.
- **Arts Education:** Expanding arts learning opportunities for children and teens in school and beyond.
- **Audience Development for the Arts:** Supporting arts organizations to develop and test ideas for reaching new audiences so that many more people might enjoy the benefits of the arts.

In each of these areas, their approach is to fund selected organizations to test promising new ideas, to conduct independent research about their efforts and related matters, and to share what we learn. The idea is to benefit grantees as well as many organizations that are interested in pursuing similar changes but may never receive our direct funding.

Walton Family Foundation, [http://www.waltonfamilyfoundation.org](http://www.waltonfamilyfoundation.org)

When Sam and Helen Walton launched their modest retail business in 1962, one of their goals was to increase opportunity and improve the lives of others along the way. This guiding principle has played a major role in the phenomenal growth of their small enterprise into a global retail leader. This principle – to the benefit of deserving people and inspiring projects around the world – also drives the philanthropic mission of the Walton Family Foundation.

Today the foundation is more focused than ever on sustaining the Walton’s timeless small-town values and their deep commitment to making life better for individuals and communities alike. By working with grantees and collaborating with other philanthropic organizations, the foundation is dedicated to making a positive difference in three focus areas, including K-12 education reform.
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March 2013