Michigan Performance Assessment Cadre Cohort II Report:

Examining the Perceptions and Challenges Associated with Use of Performance Assessments in Competency-Based Education

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CBE Report Executive Summary

INTRODUCTION

This policy report details the implementation of both Competency-Based Education (CBE) practices and performance assessments by describing the experiences of members of the second MiPAC cohort. Findings are based on surveys conducted with all 16 of the MiPAC Cohort II participants and interviews with a subset of eight participants.

REPORT FINDINGS

The following sections summarize the report's findings into two broad areas: familiarity, experience, and perceived learning needs regarding CBE; and plans for implementing performance assessments.

Familiarity, Experience, and Perceived Learning Needs Regarding CBE:

- The sample of respondents were experienced educators with only nominal experience with CBE.

- Despite their lack of experience with CBE, most respondents were somewhat or very confident with each of the 18 elements of competency-based education identified in the survey.

- Respondents most commonly identified many of the elements as areas of high need and high interest for further professional learning for educators at their school, but increased need and low interest were also popular choices.

- Those Cohort members who worked in 21j school districts had mixed experiences with CBE. While they believed in CBE practices and still attempted to enact many of them, they also found that CBE elicited considerable division among administrators, faculty, parents, and students.

Plans for Implementing Performance-Based Assessments

- Participants' visions for using performance assessments differed according to their backgrounds and current positions.

- Classroom teachers planned to implement their performance assessments directly with their students.

- Other participants were not classroom teachers, but they did work at a school site. They focused on learning about CBE and anticipated gathering interest in CBE and performance assessments at their school. Enlisting others at their school who would administer performance assessments was crucial to their success.

- Cohort members who did not work at a school site were the most uncertain about the impact of their work or their influence on teachers and students.

Report Implications and Recommendations

Promoting CBE practices and the implementation of performance assessments will require a combination of policy instruments, including inducements (rewards and resources for participating), capacity building (opportunities for professional learning), and systems changing (structures of school governance that attend to school politics and bureaucratic demands). The report concludes with the following recommendations:

1. **Provide capacity building opportunities for interested educators** and make provisions for them to enact CBE and performance assessments in ways that reward volunteers (i.e., inducements) to collaborate with like-minded peers. Such learning opportunities should embrace the Learning Forward Standards for professional learning that include:

   - Learning in professional communities

   - Integrating theory, research, and models of human learning

   - Aligning professional learning with desired student learning standards

   - Using data to plan, assess, and evaluate professional learning

   - Sustaining supports and resources needed for change

2. **Bolster district capacity and teacher capacity concurrently**. While not thoroughly investigated in this report, we did not discover any well-articulated district Theories of Learning that clarify instructional or organizational expectations, support the district's portrait of a graduate, and provide a rationale for Competency Based Education that can be shared with diverse stakeholders.

2. **Explore ways to alter structures** (i.e., systems changing) **that provide greater flexibility needed for CBE and performance assessment implementation.** Blanket initial imposition of structural changes school or district wide without consideration of issues related to school governance and politics is likely to damage a school community in ways that outstrip the benefits and will also lead to uneven implementation. Districts interested in implementing CBE should work closely with stakeholders as they co-construct the CBE program and provide considerable flexibility in implementation.

3. **Continue to offer inducements and capacity building opportunities for late comers and new hires.** Many educators may change their minds about CBE and performance based assessments if they see it being successfully implemented by their colleagues. They are also likely to appreciate a non-compulsory approach as a signal that their professionalism is valued.

4. **Avoid mandates.** Mandates are likely to be counterproductive and may harden resistance, strain relationships, and lead to bitterness and resentment. Mandates may also weaken the resolve of volunteers who, under CBE and performance assessment mandates find themselves at odds with their colleagues.

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BACKGROUND

Section 21j of the 2017-2018 State School Aid Act provided $500,000 to fund grants to design and implement competency-based education (CBE) programs. In March 2018, seven Michigan districts were awarded grants to participate in a three-year pilot under the 21j provision. Michigan State University's Education Policy Innovation Collaborative (EPIC) subsequently investigated the implementation of CBE practices in these districts.

In a separate but related effort, the Center for Assessment worked with the Michigan Department of Education's (MDE) Office of Educational Supports (OES) and Office of Educational Assessment and Accountability (OEAA) to assist a cohort of local educators in developing and implementing performance assessments for grades 3-12 in ELA and mathematics. This activity aimed to develop performance assessment expertise among select MI educators.

Since early 2021, the Michigan Assessment Consortium (MAC) has been working with the Michigan Department of Education's (MDE) Office of Educational Supports (OES) and Office of Educational Assessment and Accountability (OEAA). Plans focus on organizing the second cohort of local educators in developing and implementing perfode[armance assessments for grades 3-8 in ELA and mathematics. In addition, this activity aims to build expertise in performance assessment item development and the intention to develop a catalog of model PA's based on MI's model competencies in ELA and Mathematics for voluntary use.

In the 2021-22 school year, MAC is working with a second cohort of 16 educators to create and administer the performance assessments they develop. This work includes over 50 hours of professional learning to build an understanding of quality assessment measures while developing performance assessments that complement the CBE approach. This report is based on surveys and interviews with many of these Cohort 2 educators.

PURPOSE OF THIS REPORT

This policy report details the implementation of both CBE practices and performance assessments by describing the experiences of the second MiPAC cohort members. For this purpose, the report is divided into three parts: understanding contexts, understanding prior research, and understanding the experiences of cohort participants. Within this organizing framework, this report answers the following questions:

Understanding Contexts

- What are the core tenants of Competency-Based Education?

- What structural elements are foundational to schooling in the United States, and what is the origin of these structural elements?

- How does CBE challenge these structural elements?

- What instruments for change are available for moving schools from traditional structures and practices to those demanded by CBE?

Understanding Prior Research

- What do previous reports (most notably the EPIC report) suggest about the implementation of CBE in Michigan's 21j pilot districts?

Understanding the Experiences of Cohort Participants

- What are the professional backgrounds of MiPAC cohort II participants?

- How much experience do MiPAC cohort II participants have in Competency-Based Education (CBE)?

- How confident are MiPAC cohort II participants in their knowledge of core CBE principles and practices?

- What CBE principles and practices do MiPAC cohort II participants identify as areas of professional learning needed for themselves and their colleagues?

- How do the local education contexts affect how MiPAC cohort II participants enact CBE practices and performance assessments?

- How do MiPAC cohort II participants plan to implement performance-based assessments with these contexts in mind?

UNDERSTANDING CONTEXTS

The Core Components of Competency-Based Education

As will be suggested throughout this report, Competency-Based Education (CBE) marks a stark departure from traditional educational practice. The Michigan Department of Education offers the following seven components of CBE:

- Students are empowered daily to make important decisions about their learning experiences, how they will create and apply knowledge, and how they will demonstrate their learning.

- Assessment is a meaningful, positive, and empowering learning experience for students that yields timely, relevant, and actionable evidence.

- Students receive timely, differentiated support based on their individual learning needs.

- Students progress based on evidence of mastery, not seat time.

- Students learn actively using different pathways and varied pacing.

- Strategies to ensure equity for all students are embedded in the culture, structure, and pedagogy of schools and education systems.

- Rigorous, common expectations for learning (knowledge, skills, and dispositions) are explicit, transparent, measurable, and transferable.

Furthermore, the MDE couches these components within the experiences and practices of students and teachers who engage in personalized learning, personalized teaching, and educational technology. The MDE offers the following definition for personalized learning:

> Personalized learning occurs when students have a degree of choice over their education in terms of delivery, context, and pacing. Individual outcomes and how proficiency will be demonstrated are collaboratively defined by the student and the teacher. Students' interests, experiences, and abilities guide their learning, making new information more relevant and meaningful. This approach

has the potential to build the student's capacity and desire to learn beyond the scope of the curriculum and the confines of the classroom.

The MDE has also developed the following definition of personalized teaching to complement personalized learning:

> Personalized teaching is the continual collaboration between the teacher and the student, with the teacher facilitating, mentoring, and monitoring of student choices about personal learning plans. It incorporates flexibility within the learning environment to allow student needs to drive instructional strategies, assessments, use of time, and materials. Connecting a student's instruction to their personal interests, experiences, and abilities fosters a greater sense of ownership and efficacy in the student.

In sum, in the CBE framework, **students exercise considerable discretion in how and what they will learn, how rapidly they learn it, and how they will demonstrate success**. Student choices will be based, at least in part, on their interests and experiences. In this sense, **CBE will be "student-centered."** The CBE framework demands teachers to provide greater curricular, temporal, and assessment flexibility and provide students with timely, relevant, and actionable evidence to improve their learning while connecting learning content to students' interests, experiences, and abilities. Ultimately, student promotion is based on the demonstration of mastery rather than on the accumulation of seat time. The following section considers how these principal components and definitions align with traditional schooling structures.

The Traditional Structure of Schooling in the United States

To put it mildly, CBE differs from the traditional schooling structures that govern student learning experiences. This section argues that the well-established traditional structures that are firmly in place in almost every school district in the United States are directly antithetical to the requirements of CBE.

Tyack and Tobin (1994) refer to the "regular structures and rules that organize the work of instruction" (p. 454) as the "grammar of schooling." In the early 20th century, a disparate set of loosely connected and locally funded and administered schools began to organize into a more coherent system. Local control was preserved, to be sure, but schools also became almost identically organized in that they placed students in age-based cohorts in which they would progress through school in almost lock-step fashion. Furthermore, the curriculum expanded to accommodate the interests of a diverse student body, and knowledge was fractured into "subjects," particularly at the high school level. Finally, learning was summarized by letter grades that translated student achievement simply so that it could be easily understood by parents, administrators, employers, and perhaps most importantly, college admissions boards. The type of instruction that this system engendered was primarily teacher-centered (Cuban, 1993; 201): teachers maintained tight control of large batches of children and led them through an undifferentiated set of activities by presenting distilled knowledge in a manner that allotted the same instructional time for all students, asking focused questions to keep the lesson moving briskly, restricting student movement to maintain order, and holding students individually accountable for memorizing facts (Cohen, 2008). Since instructional time was both the same for all students and inadequate to assure mastery of the material by all students, grading reflected these differences in which students either "got it" or did not. This essential "grammar" of schooling has proven remarkably resilient despite decades of would-be challengers.

In its *Defining Competency-Based Education in Michigan* document, the MDE recognized many of the traditional grammar of schooling elements and contrasted them against the demands of CBE. (See Figure 1 reproduced from MDE document.)

Figure 1. From Defining Competency-Based Education in Michigan (MDE)
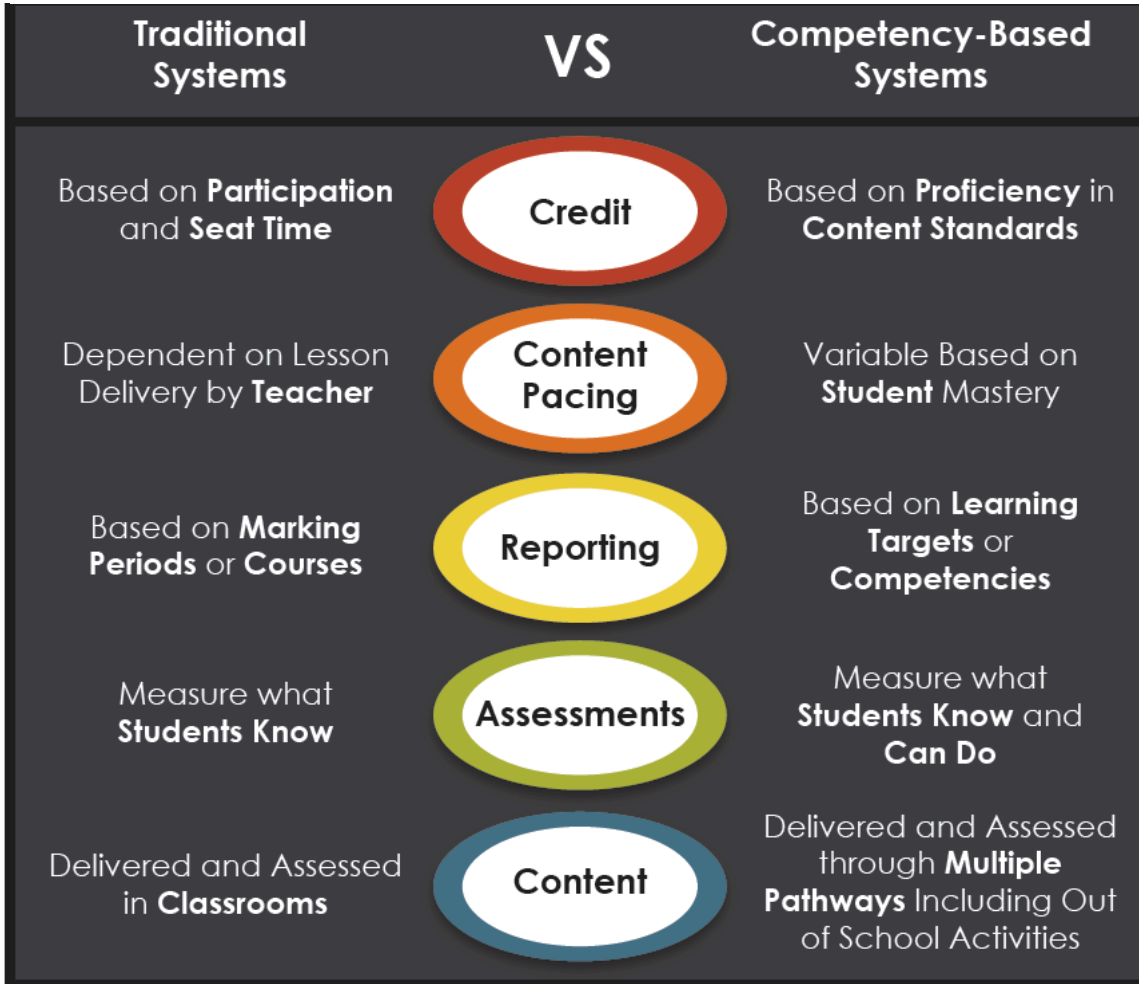
Change Instruments

This section considers the use of policy instruments in promoting CBE and discarding the traditional grammar of schooling. McDonnell and Elmore (1987) identified four policy instrument types—mandates, inducements, capacity building, and systems changing. Mandates are fixed and firm rules intended to ensure compliance. Inducements are non-mandated incentives meant to elicit specific behaviors. Capacity building attempts to infuse local actors with the necessary skills to achieve policy objectives. Finally, systems change involves the altering of traditional structures.

These four policy instruments are used in different circumstances. For example, mandates use coercion to ensure compliance, while inducements employ financial or other incentives to elicit changes in practice. In addition, mandates demand universal, standard action, while the use of inducements assumes that capabilities and willingness will differ and that a corresponding reward schedule should be employed.

In contrast, capacity building is the intended cultivation of material or human resources to achieve a policy outcome. Capacity building assumes that policy goals are not attainable unless those implementing the policy have considerable opportunities to learn and grow.

Finally, systems changing assumes that in order for a reform to be successful, fundamental structures must be altered. But, again, the current system is the problem. Of course, there are many ways to conceive of the

"systems" that affect schooling, but the one of most interest here is the "institutional structure by which public goods and services are delivered" (McDonnell & Elmore, 1987, p. 139). The institutional structures affecting public education in the United States include a unique combination of bureaucratic, professional, and local political control. There is a natural tension among these different modes of governance, and these tensions often inhibit innovations. For instance, professional educators might favor a new innovation like CBE. Still, local political influence via the school board or bureaucratic requirements (e.g., rules about seat time) may challenge plans for implementing innovations by making them logistically or politically impossible.

As evident in what follows, CBE reform has tried a mixture of inducements and capacity building but has not activated systems changing to the extent necessary to achieve its objectives.

UNDERSTANDING PRIOR RESEARCH

Findings From the EPIC report

Recently, the Education Policy Innovation Collaborative (EPIC) and Michigan State University investigated the implementation of CBE at three pilot schools that took part in MDE's 21j program. The EPIC researchers organized their report according to the eight CBE "core components" and "resources and supports" they identified as most important. These components and resources, and supports include:

- Educator professional development and support.

- Profile of a graduate.

- Measurable competencies.

- Formative assessment.

- Personalized instruction.

- Study agency.

- Project-based learning.

- Competency-based credentialing.

As noted above, professional development (please note that our report refers to professional learning elsewhere in contrast to professional development) is one of the key instruments available to make change, and nearly every modern reform makes some provision for professional development. For example, EPIC researchers found that their case study districts hired instructional coaches to facilitate teacher learning about CBE and enacting CBE practices. Districts also provided teachers with release time to invest in the coaching experience. However, instructional coaching was not mandatory, and many teachers chose not to participate. Furthermore, coaches may have lacked subject-specific expertise and sufficient training to thrive in their new roles. These shortcomings significantly weakened the potential for this capacity-building resource to effect change.

EPIC researchers also determined that even though districts had developed teacher-endorsed profiles of graduates, students were unaware of these profiles or what they meant for them.

Third, schools developed competencies. However, none of the districts demanded that students demonstrate mastery of these competencies before advancing. Instead, students continued to move through school with their age-based cohorts as they have traditionally done (see above).

Fourth, EPIC researchers found that all districts administered formative assessments (note that the EPIC researchers do not define formative assessment as a *process.* Or rather as a one-time *assessment event,* better thought of as interim assessments), but only teachers at the elementary school level acted on the assessment findings to modify instruction. Teachers across districts and grade levels also struggled to integrate student performance assessments into their overall teaching and grading (the coin of the realm in the traditional grammar of schooling).

Fifth, teachers in two of the three focus districts had trouble personalizing instruction and instead relied on the adopted curriculum. However, teachers were better able to personalize instruction in one school by implementing project-based activities. Student agency at the other research sites remained challenging, and the research team found that students were ambivalent about taking a more decisive role in what they would learn, how they would learn it, and how they wanted to be assessed. Most of the students in their study suggested that they were content having teachers make these decisions for them. In other words, they favored the teacher-centered instruction that has been the traditional pattern of instruction. It is important to note that the EPIC study did not indicate if the districts studied articulated and embraced a Theory of Learning that might have served to inform teacher efforts to implement personalized instruction and impact student agency in learning. It is likely that such a theory of learning is required if districts are to successfully establish a rationale for competency-based education and implement it successfully.

The EPIC researchers next examined the degree to which districts changed the way they reported student progress through grading or "credentialing." They determined that grading that reflects academic competency rather than an amalgamation of peripheral considerations (e.g., attendance, behavior, task completion) was minimal. As the authors of the EPIC report noted, "at the secondary level, schools faced immense pressure to conform to the expectations of post-secondary institutions" (p. 17, see also The Traditional Structure of Schooling in the United States section above).

In sum, EPIC researchers found an uneven implementation of CBE practices in the study schools. It should be noted that the data gathered for the report were compiled early in implementation, and the changes implied by CBE require time to learn and implement. However, it is also possible that the policy tools available to implementing schools—inducements and capacity building—may have been insufficient for the challenge of helping school systems to depart from the traditional grammar of schooling. Concerted efforts at system changing will also likely be necessary. Notably, the one charter school in their study seemed to make the most progress in implementing CBE practices. However, this may be because charter schools are systems-changing and are not subject to the same set of governing and management structures as traditional public schools.

REPORT DATA

To answer the questions listed in the *Understanding the Experiences of Cohort Participant* section above, the Michigan Assessment Consortium (MAC) research team designed a two-step study. The first step included a survey of the individuals who signed up to participate in the MiPAC cohort II during the 2021-22 school year. All 16 MiPAC participants completed the study. The report answers the following questions (also listed above) from the survey results:

- What are the professional backgrounds of MiPAC cohort II participants?

- How much experience do MiPAC cohort II participants have in Competency-Based Education (CBE)?

- How confident are MiPAC cohort II participants in their knowledge of core CBE principles and practices?

- What CBE principles and practices do MiPAC cohort II participants identify as areas of professional learning needed for themselves and their colleagues?

The MAC researchers also conducted a semi-structured interview with eight of the 16 MiPAC Cohort II participants. These interviews serve as the empirical basis to answer the following questions:

- How do the local education contexts affect how MiPAC cohort II participants enact CBE practices and performance assessments?
- How do MiPAC cohort II participants plan to implement performance-based assessments with these contexts in mind?

MiPAC Cohort II Survey Summary Report

The following section reports the findings from the survey administered to the participants in the competency-based education Michigan Performance Assessment Cadre (MiPAC) project under the direction of the Michigan Assessment Consortium (MAC) in October and November of 2021. This section answers the following research questions:

- What are the professional backgrounds of MiPAC cohort II participants?
- How much experience do MiPAC cohort II participants have in Competency-Based Education (CBE)?
- How confident are MiPAC cohort II participants in their knowledge of core CBE principles and practices?
- What CBE principles and practices do MiPAC cohort II participants identify as areas of professional learning for themselves and their colleagues?

In sum, we make the following general observations:

- The sample of respondents were experienced educators that had only a little experience with CBE.
- Despite their lack of experience with CBE, most respondents were somewhat or very confident with each of the 18 elements of competency-based education identified in the survey.
- Respondents most commonly identified many of the elements as areas of high need and high interest for further professional learning for educators at their school, but increased need and low interest was also a popular choice.

Respondent Profile. Several respondents indicated that they held multiple professional roles. In total, six respondents were teachers, five were instructional coaches, three were consultants, two were district administrators, one counselor, a restorative practice facilitator, a reading interventionist, and one was a data and assessment coordinator.

In addition to holding diverse and, in some cases, multiple roles, the respondents were highly experienced. None of the respondents were in their first three years in education. Four respondents had 4-10 years of experience, five had between 11-15 years of experience, and seven had 16 or more years of experience.

Respondents had much less experience with CBE, however. Over half of the respondents (9) were in their first year working with competency-based education in 2021-22. Two were in their second year, and one was in their third year. Three had five or more years of experience.

Confidence in the Elements of Competency-Based Education. Educators were asked about their level of confidence with each of the following 18 elements of CBE (derived from Casey & Sturgis, 2018):

- Organizing curriculum and instruction to focus on a broad, more holistic set of student success outcomes for college, career, and lifelong learning.

- Setting clear and measurable learning expectations that include levels of student performance required for mastery.

- Drawing on pedagogical principles of learning sciences when teaching.

- Taking into consideration student-directed learning pathways, including student voice and student choice.

- Designing instruction to provide students with timely and differentiated support.

- Providing daily flex learning time for students.

- Using flexible learning time to provide students with strategic, scaffolded instruction.

- Embedding the formative assessment process in the personalized learning cycle.

- Using summative assessment practices in the personalized learning cycle.

- Employing student self-and peer-assessment.

- Constructing or administering performance assessments that facilitate the transfer of knowledge to challenging new contexts.

- Working with students to clarify the next steps for their individualized learning.

- Using student assessment information to plan for my own professional learning.

- Communicating student progress in ways that support the learning process and student success.

- Closely monitoring the growth and progress of students based on their learning pathways, not just grade level.

- Communicating student progress through evidence-based grading, including learning academic content and applying transferable skills.

- Facilitating student advancement once students have met or exceeded expectations for mastery.

- Providing instruction until students thoroughly learn the concept or skill.

Despite their overall inexperience with CBE, respondents indicated high confidence in the CBE elements. For example, respondents rarely indicated that they were "not confident" with any of the elements. In no instance did more than two respondents indicate they were "not confident." For three elements, two respondents indicated they were not confident with a CBE element included:

- Providing daily flex learning time for students.

- Using flexible learning time to provide students with strategic, scaffolded instruction.

- Using summative assessment practices in the personalized learning cycle.

For five of the CBE elements, no respondent indicated that they were "not confident." These five elements included:

- Setting clear and measurable learning expectations that include levels of student performance required for mastery.

- Drawing on pedagogical principles of learning sciences when teaching.

- Designing instruction to provide students with timely and differentiated support

- Employing student self-and peer-assessment.

- Providing instruction until students thoroughly learn the concept or skill.

However, the percentage of respondents who indicated that they were "not confident" may have been somewhat artificially depressed because respondents were more likely to mark "unsure" about their confidence level. Indeed, "unsure" was a more popular response than "not confident."

In contrast, respondents frequently indicated that they were often "very confident" with a CBE element. For example, at least half the sample indicated they were very confident with 13 of the 18 CBE elements. These elements included:

- Organizing curriculum and instruction to focus on a broad and holistic set of student success outcomes for college, career, and lifelong learning.

- Setting clear and measurable learning expectations that include levels of student performance required for mastery.

- Drawing on pedagogical principles of learning sciences when teaching.

- Taking into consideration student-directed learning pathways, including student voice and student choice.

- Designing instruction to provide students with timely and differentiated support.

- Embedding the formative assessment process in the personalized learning cycle.

- Using summative assessment practices in the personalized learning cycle.

- Employing student self-and peer-assessment.

- Using student assessment information to plan for my own professional learning.

- Communicating student progress in ways that support the learning process and student success.

- Communicating student progress through evidence-based grading, including learning academic content and applying transferable skills.

- Facilitating student advancement once students have met or exceeded expectations for mastery.

- Providing instruction until students fully learn the concept or skill.

Finally, in other instances, respondents were "somewhat confident" more than they were "very confident," "not confident," "or unsure." The elements for which respondents were primarily "somewhat confident" included:

- Constructing or administering performance assessments that facilitate knowledge transfer to challenging new contexts.

- Working with students to clarify the next steps for their individualized learning.

- Closely monitoring the growth and progress of students based on their learning. Pathways, not just grade level.

The responses for confidence in CBE elements are represented visually in Attachment A.

Perceived Need and Interest in Professional Learning about the CBE Elements. Next, respondents were asked about how they perceived the needs and interests of educators at their school regarding learning about the CBE elements. They were presented with the following categories for each of the elements:

- Low Need/Low Interest.

- Low Need/High Interest.

- High Need/Low Interest.

- High Need/High Interest.

Respondents seldomly indicated that any of the elements were of "low interest/low need" for educators at their schools. The aspect "Using student assessment information to plan for professional learning" was the most frequently identified as being of low interest/low need, but this by only four of the 16 respondents.

Likewise, elements were not commonly identified as being of "low need/high interest" for educators in respondents' work contexts. For example, for one CBE element, "Setting clear and measurable learning expectations that include levels of student performance required for mastery," five educators responded that they believed the element was of low need/high interest among colleagues. For another element, "Drawing on pedagogical principles of learning sciences when teaching," six respondents identified the element as low need/high interest.

"High need/low interest" was a more frequent response. For five of the 18 elements, high need/low interest was the most frequent response. These five elements included:

- Using flexible learning time to provide students with strategic, scaffolded instruction.

- Using summative assessment practices in the personalized learning cycle.

- Closely monitoring the growth and progress of students based on their learning pathways, not just grade level.

- Communicating student progress in ways that support the learning process and student success.

- Facilitating student advancement once students have met or exceeded expectations for mastery.

For three other elements, high need/low interest was tied with the increased need/high interest for the most popular choice for these elements:

- Taking into consideration student-directed learning pathways, including student voice and student choice.

- Employing student self-and peer-assessment.

- Working with students to clarify the next steps for their individualized learning.

Despite the popularity of the high need/low-interest choice compared to low need/high interest and low need/low interest, the final option ("high need/high interest") emerged as the most popular selection. When thinking about High need/high interest was the most popular choice for the following elements:

- Organizing curriculum and instruction to focus on a broad and holistic set of student success outcomes for college, career, and lifelong learning.

- Setting clear and measurable learning expectations that include levels of student performance required for mastery.

- Designing instruction to provide students with timely and differentiated support.

- Providing daily flex learning time for students.

- Embedding the formative assessment process in the personalized learning cycle.

- Constructing or administering performance assessments that facilitate the transfer of knowledge to challenging new contexts.

- Using student assessment information to plan for my own professional learning.

- Communicating student progress through evidence-based grading, including learning academic content and applying transferable skills.

- Providing instruction until students fully learn the concept or skill.

The complete set of information is shown in Appendix B.

Follow Up Survey. A follow-up survey asked respondents to rank in order the nine elements that they indicated most frequently as areas of professional learning that were high need/high interest. Ten of the 16 cohort II members responded to the survey. Respondents were asked to rank elements in two survey items—one item for their own personal learning and one item for their perceptions of their colleagues' learning needs.

First, respondents prioritized their own learning needs of the nine high interest/high demand elements as follows (Listed here from MOST to LEAST important):

- **Most Important:** Setting clear and measurable learning expectations that include levels of student performance required for mastery.

- Organizing curriculum and instruction to focus on a broad and holistic set of student success outcomes for college, career, and lifelong learning.

- Constructing or administering performance assessments that facilitate the transfer of knowledge to challenging new contexts.

- Designing instruction to provide students with timely and differentiated support.

- Embedding the formative assessment process in the personalized learning cycle.

- Using student assessment information to plan for my own professional learning.

- Communicating student progress through evidence-based grading, including learning academic content and applying transferable skills.

- Providing instruction until students fully learn the concept or skill.

- Least Important: Providing daily flex learning time for students.

Second, respondents ranked the learning needs of these same nine elements for educators in their school or district or for those with whom they currently worked in the following way (also listed here from MOST to LEAST important):

- **Most Important:** Organizing curriculum and instruction to focus on a broad and holistic set of student success outcomes for college, career, and lifelong learning.

- Setting clear and measurable learning expectations that include levels of student performance required for mastery.

- Embedding the formative assessment process in the personalized learning cycle.

- Designing instruction to provide students with timely and differentiated support.

- Communicating student progress through evidence-based grading, including learning academic content and applying transferable skills.

- Providing instruction until students fully learn the concept or skill.

- Using student assessment information to plan for my own professional learning

- Providing daily flex learning time for students.

- Least Important: Constructing or administering performance assessments that facilitate the transfer of knowledge to challenging new contexts.

Notably, in terms of performance assessments, respondents indicated a higher priority for themselves than they did for their colleagues. This may have to do with the fact that the MIPAC cohort focuses on participants' personal enactment of performance assessments this year. Therefore, participants may have felt a greater urgency to learn about these assessments and how they would develop and administer them. With this in mind, they may not have felt the same urgency when considering their colleagues' learning needs.

MiPAC Cohort II Interview Summary Report

This section answers the following research questions:

> - How do the local contexts of education affect how MiPAC cohort II participants enact CBE practices and performance assessments?
> - How do MiPAC cohort II participants plan to implement performance-based assessments with these contexts in mind?
> - How, if at all, are respondents' implementation plans related to their current roles and responsibilities?

Contexts of Implementation. Because the MiPAC cohort II included a wide range of roles, many members were not working in a school or were working in a school but in a position outside the classroom. The following provides details about the interview sample's experiences, expertise, and work contexts (please note that all names are pseudonyms). See Appendix C for the interview protocol.

Mary—high school math teacher. Mary had 16 years of experience and was working in a school that had been part of the 21j Competency-Based Education grant. Three years before the interview, Mary had been working on an interdisciplinary team within her school to construct a program including thematic units, problem-based activities, cross-curricular themes, and projects, student input on their courses, flexible class schedules, and an altered grading system that placed students on a five-point scale instead of letter grading. Mary enjoyed the close collaborative work with her peers and was beginning to see the benefits of CBE for students. However, not all of Mary's colleagues were enthusiastic about the CBE grant, and challenges soon overwhelmed Mary and her team's efforts. She lamented:

> [Our program] lasted for a year, and then our school shifted hugely in the opposite direction. It did away with competency-based education and all verbiage that said anything about having rubrics or five-point scales on official documents or things that were posted on the school website.

Rather than bringing the staff together, CBE actually fractured the teaching staff at Mary's high school and divided the community. Nevertheless, at the time of the interview, Mary remained enthusiastic about CBE. She and her small group of teachers still enacted CBE practices, even if they kept a low profile and had no explicit administrative support.

Rene—high school English Teacher. Rene and Mary worked at the same high school and were two close and like-minded colleagues when it came to CBE. They had weathered the district tumult and division that revolved around the district's focus on and implementation of CBE. Like Mary, Rene reflected on these developments thoughtfully, understood the challenges CBE implementation elicited, and articulated some of CBE opponents' concerns:

> I think a lot of the parents didn't like that everything changed at once. It wasn't just the project-based learning. It wasn't just the cross-curricular integration. It was that we also changed the grading system, so we went from having A's and B's to a 4.0 scale and doing all rubrics and competency-based learning. I think it was all much too fast, and I think the parents didn't like it and they didn't understand it, and I think the kids fueled off of that, so then a lot of the students knew that their parents didn't like it so then they didn't like it. I think it was just like the perfect storm.

Also, like Mary, Rene persisted in implementing CBE practices with her students and with the support of a pocket of teachers at her school who believed in the CBE approach. She continued to see the benefits, particularly for her collaboration with peers and her work with students, even as the term "competency-based education" became associated with a controversial and failed program:

> I like doing the rubrics. I like having these scales to be able to assess students. I think it's much more accurate and much more objective. There are a few [teachers] that were part of that team that I still work within the same kind of area, so I feel like we're all on the same page with that, so it's nice to be able to talk about it still.

Kelly—High school English Teacher and Instructional coach. At the time of the interview, Kelly had been teaching for 15 years. She was in her fifth year in her current role as a high school English teacher and her third year as an instructional coach. While she enjoyed navigating well through both jobs, the instructional coach role, in particular, was challenging. She reported receiving considerable "push back" from more experienced teachers who restricted her access to their classrooms. Kelly enjoyed balancing her role as a teacher and instructional coach despite the challenge and appreciated bringing administrator perspectives into teacher conversations and teacher perspectives into administrator conversations.

Kelly's district was involved in the original 21j grant, and the district's overall interest and involvement in CBE precedes her time there. Even so, Kelly explained that the district's ambitions outstripped its ability to implement (at least initially) and that the district was now in the process of pausing, reflecting, and strengthening the CBE program. While this may be a necessary element of an eventually successful implementation, it was not without some negative consequences, as Kelly explained:

> CBE has become a lot of work, and teachers don't all see the value. They don't see the understanding behind it because [they think], "Well, I've been doing this for x amount of years. Why can't I just continue?" So it's caused a lot of frustration across multiple departments, schools, and just everywhere.

Even so, Kelly continued to explore new ways to innovate. She became involved in MiPAC when she received an email from the assistant superintendent, who suggested she join. In her role in the cohort, Kelly has seen how her experiences with CBE in her district and the expectations of CBE principles espoused by the state align, and this encouraged her that she and her district are on the right track.

Amy—restorative practice facilitator. Amy was working outside the classroom in a school that had no experience with CBE or performance assessment. She was spending the first part of the year developing performance assessments as part of her responsibilities as a MiPAC participant and generating interest for performance assessments at her school site. At the time of the interview, her efforts were just underway in telling teachers and administrators about performance assessments and stimulating their interest. She hoped that she could get a portion of the teachers on board by explaining how performance assessment aligned with the teachers' own current practices. She explained:

> I'm envisioning that once I get at least a third of the teachers involved, it will spread like wildfire. It will be successful because it will help with what teachers are trying to do anyway. The fact that you are trying to make it where children are more apt to want to do these assessments can be because… it's asking them to do real-life things that they've actually learned. So I think it will take off because it makes it a lot better for the kids and more accessible for teachers.

Marissa—Mathematics instructional coach in a virtual school. During the 2021-22 school year, Marissa was working as a mathematics instructional coach, where she observed teachers' instruction, conferenced with them about her observations, and examined data with teachers to identify areas needing attention. When Marissa became involved in the MiPAC Cohort 2, she barely knew anything about CBE or performance assessments. Marissa heard about the MiPAC program through a professional association she was a member of, and she applied to participate and subsequently joined. While she was developing her expertise, she began to see how performance assessments and CBE could be "powerful" for teachers, particularly those who were working in intervention settings.

Despite this enthusiasm and perceived utility, at the time of the interview, Marissa had yet to discuss CBE and performance assessments with the rest of her staff, and she was thinking about how to effectively and strategically introduce performance assessments in ways that honored teachers' professional autonomy and aligned with her own role and job responsibilities. She explained:

> It's a big change because they have to change everything in how they teach, and they can't teach the way they want to anymore. That's not my role; that's not my purpose. And also the time factor. How can I get this information to them and inspire them, and hopefully see them do some sort of change but also present it in a short amount of time? So that's where I am right now. I'm just at the very beginning stages; it's like I have the information that I want to share. And now I have to figure out how to do it.

Marissa made progress quickly. Due to her involvement in the MiPAC cohort, Marissa continued to learn, and she was ultimately emboldened to share these new ideas with some of the teachers on staff. In a follow-up communication, Marissa noted:

> I've been starting [to share with colleagues], and some teachers are really into it, which is exciting! Some of the teachers jumped right in, eating it up and just loving the conversations they were getting from the students. Other teachers, as to be expected, are still holding tight to the old skill and drill. That's ok! We're making progress.

Elizabeth—School improvement consultant. At the time of the study, Elizabeth had been working as a school improvement consultant in the district office for the past five years. In her teaching experience prior to assuming her current role, Elizabeth recalled implementing several CBE-aligned practices, despite working in a traditional context:

> When I was teaching, I was trying really hard to grade in a standards-based way and only assess larger projects or assessment, not the day-to-day work. That was a challenge to do that to some extent because I was still working within our very traditional grade book and colleagues that were

grading traditionally. So [competency-based grading] was my first step into understanding anything related to [CBE].

Directly after school shutdowns in the spring of 2020, Elizabeth and a small group of colleagues at the district office began reading about CBE and envisioning how education might be re-imagined in their district. Elizabeth mentioned capitalizing on this window of opportunity to break from the traditional grammar of schooling. At the same time, she acknowledged that teachers were feeling "overwhelmed," and she felt an acute tension between innovating and returning to the welcome comforts of the familiar. Elizabeth applied for acceptance in the first MiPAC cohort, and she continued her work into the second cohort. This time she was joined by her district counterpart, who specialized in math (Elizabeth is an ELA specialist). In addition to this work, Elizabeth was also actively working with school administrators and teacher leaders to capitalize on the opportunity to have teachers assess students differently in the virtual setting. She worked with an even broader group of educators in her district to develop a portrait of a graduate. However, while she and her district team continue to learn more about competency-based education, she has not yet shared the full breadth of CBE practices. Ultimately, Elizabeth hoped:

> To help [teachers] understand that if we go this innovative, more competency-based route, that doesn't indeed make their job harder. Hopefully, it would make their job easier in some ways that just changes things so that kids are more engaged. They're doing things that they care about that are authentic, and so hopefully, that would make their jobs easier because then you have fewer management issues.

Christine—Director of secondary education. Christine had more than two decades of experience working in education, and at the time of the interview, she was working as a district administrator as the director of secondary education, a position that she had been in for a little less than a year. The position itself was a new one in the district, and at the time of the interview, Christine was working diligently to define the position's roles and responsibilities. One of Christine's primary challenges was figuring out how to innovate in her new role and challenge the traditional grammar of schooling, as she explained:

> I don't want to do [my job] the traditional way anymore, but I don't know how to move it forward…How do I move it forward and take it in a new direction that would really get at how kids should experience school?

While she was new to CBE specifically, Christine had long cultivated her skill and expertise in the related principles of assessment for learning, formative assessment, and standards-based grading. Even before assuming her new position, Christine had become sensitive to a state-level push for CBE, and this intrigued her because it aligned with her own sense of best practices. She has since learned more about CBE from a wide variety of sources, including becoming involved in the second MiPAC cohort. She anticipated that her district superintendent would want to move toward CBE practices in the future and that Christine may be called upon to lead the initiative. However, while the district superintendent was supportive of CBE, the district-level buzz had yet to affect the practices at district schools, particularly the high school, and there was no immediate and well-articulated plan for enacting competency-based education or performance assessments.

Joan—administrator and consultant. Joan had over five years of experience working with CBE, making her one of the most experienced educators in the MiPAC cohort. She also had over 25 years of experience in education in a wide variety of roles. As a classroom teacher, Joan was an early adopter of grading reform in particular and its emphasis on students demonstrating content competence versus accumulating points. For many years she offered (and at times, required) multiple relearning and reassessing opportunities so that students could demonstrate learning rather than just take a low or failing grade. She also was an early adopter of tightly tying objectives/standards to assessment tasks and reporting outperformance based on those objectives/standards. She also co-designed a district 9th-grade cross-disciplinary multi-month project, which

provided student choice, voice, opportunities for feedback use, and multiple means of reporting findings. Since leaving the classroom to become a content specialist, she has worked on state-level projects, including developing state standards and developing state and national summative assessments.

During the 2021-22 school year, Joan worked as a district administrator (a position she had held for over 10 years), providing support for core content and assessment. In all content areas, Joan favored teaching conceptually before details or procedures. One of her biggest professional challenges was reconciling this project with her prior experience of several recent local attempts at CBE that altered disciplinary practices in favor of relevance. She pointed out that adoption of CBE would be no guarantee that high-level thinking practices would be used while learning the content. Even so, she continued to contribute to CBE and performance assessments efforts. Joan joined the MiPAC cohort when a colleague working with CBE recruited her to provide assistance to others with less experience in CBE and to assist Cohort members in writing performance assessments.

Using Performance Assessments

The interview participants differed sharply in how they envisioned using performance assessments, and these differences can be traced to the participating educators' backgrounds and current positions. Cohort members who were classroom teachers (Mary, Rene, and Kelly) could implement their performance assessments directly with their students. For instance, Mary (high school math teacher) had experience with CBE, believed in its core principles, and was surrounded by a close set of like-minded colleagues (even if the larger school community was vehemently divided on the issue). For her, the goals of participation in MiPAC were clear. She was looking forward to developing and administering assessments that spurred her own development as an educator and benefited her students.

Others MiPAC participants were not in the classroom and, thus, would be administering the performance assessments directly. These participants were of two types. First, some cohort members like Amy and Marissa were not in the classroom, but they did work at a school site. They initially focused on learning as much as they could about CBE and anticipated gathering interest in CBE and performance assessments at their school. Enlisting others at their school is crucial to their success. Fortunately, as illustrated by Marissa's case, these efforts are well underway.

Finally, some cohort members neither taught nor worked in a school (Elizabeth, Christine, and Joan). These cohort members were the most uncertain about the impact of their work or their influence on teachers and students. For instance, Elizabeth hoped that the elementary school teachers would administer the performance assessment she and her MiPAC team developed. She also conceded that:

> We cannot tell people what to do, so we have to create buy-in and ownership from them and reasons why they should do something. Obviously, we do have, generally, the support of our boss and assistant superintendent, and that position comes with a lot of weight. But even so, people figure out ways to not do things that you know their bosses say to do.

Both Christine and Joan were uncertain about the next steps. Joan, in particular, viewed her role in the Cohort primarily as one in which she brought her experience and expertise of many years working with CBE and performance assessments to help strengthen the skills and abilities of the less experienced cohort members, but she had no plans to administer the assessments herself.

Implications of Report

This section examines the implications of the findings from the MiPAC cohort II presented here and the prior EPIC study on 21j districts. The section considers these implications by returning to the policy instruments (McDonnell & Elmore, 1987), including inducements, capacity building, systems changing, and mandates.

Inducements. Inducements are a powerful instrument for change because they (a) structure opportunities to learn about innovations and (b) award participants for their efforts of change. Undoubtedly, 21j and the MiPAC cohort have provided opportunities that translated ideas about CBE and performance assessments into substantive chances to make a change, even if this change was restricted to participants' most immediate contexts. Local educators will take advantage of inducements differently because, by their very nature, inducements leave the door open to not participate. For example, district administrators can accept inducements and find administrators and teachers to participate, but inducements quickly lose their power when they encounter opposition. In such cases, inducements can worsen local conditions because they can potentially divide school communities and engender hard feelings and distrust between those who take the inducements and those who do not. Furthermore, as is evident in the MiPAC cohort, those who respond to the opportunities and tangible and intangible rewards that inducements provide may not be well situated to actually make the changes that the program designers have in mind. Only a minority of the MiPAC participants were positioned to implement the performance assessments they developed. Most cohort members relied on others, and they were uncertain about how, if at all, the performance assessments could be used.

Capacity Building. Because CBE challenges the traditional structures that govern instruction (i.e., the grammar of schooling), those who attempt to implement CBE are likely to encounter exceptional challenges. Undoubtedly, those who embrace CBE principles and practices can find a small group of like-minded colleagues with whom they learn and experiment in their local contexts. No one in the interview sample from Cohort 2 doubted the importance of capacity building, which allowed them to learn more about CBE and performance assessment. Such capacity building through professional learning seems necessary for educators' knowledge to catch up with their initial enthusiasm. The survey results suggest that knowledge building may happen quickly, as respondents indicated that they had little experience with CBE yet felt confident in their knowledge about it. Interview evidence indicates that initial learning opportunities resulted in eagerness to learn more, excitement about the potential of CBE and competency-based assessment, and boldness to share with colleagues.

Systems Changing. Closing the knowing-doing gap requires more than rewarding participants and providing them the opportunities to learn. Systems-changing will also be necessary. However, as is evident from Cohort 2 participants who also taught in 21j pilot districts, transitioning from traditional schooling structures to those required by CBE will elicit considerable resistance from a subset of administrators, teachers, students, parents, community members (including school boards) who support more traditional structures that characterize the status quo. In other words, key district actors may favor the CBE approach and be able to find a group of volunteer teachers who will experiment, but another group may oppose these changes vehemently, and this opposition can divide school communities, enrage parents, and erode trust among teachers. If traditional governing structure arrangements cannot truly be changed, it will be necessary for CBE proponents to engage different stakeholders to build relationships that facilitate implementation. Ignoring the governing structures at the heart of systems-changing will almost certainly lead to failed implementation. Such change will not be easy.

Mandates. The EPIC researchers suggested that mandates be used to complement inducements and systems-changing efforts. They reported that the effects of coaching were disappointing both because the coaches themselves lacked all the requisite skills and abilities (i.e., they needed more capacity building) and because teachers chose whether or not they wished to participate. The EPIC researchers drew the implication that participation in the coaching experience should not be voluntary. However, this suggestion underestimates the precarious position of instructional coaches who are eager to help but who are also likely to encounter teachers who restrict the coach's access to their classroom and who have little or no interest in being "coached." This suggestion also underestimates the longstanding traditions for educators to opt-out of participation. Forcing participation may do more harm than good and place coaches in an impossible position of imposing themselves on unwilling teachers. Research is needed on the role of coaching in Michigan and how

coaches facilitate the implementation of reforms and/or harden resistance.

Furthermore, future research should examine the "fit" between coaching as the primary capacity-building resource to promote Competency-Based Education. There may be other, more fruitful approaches to capacity building that lead to robust and sustained CBE implementation. We return to this point below in concluding recommendations.

CONCLUDING RECOMMENDATIONS

CBE challenges many of the foundational structures that govern how we have traditionally provided instruction. Early attempts to change these structures have met resistance, and each policy instrument (inducements, capacity building, systems changing, mandates) is limited in its potential to create change. Additionally, no policy instrument can be deployed without unintended and unwanted consequences. So what is to be done? Certainly, it is important to note that despite the challenges and seeming impotence of state and district policy instruments, good work is being done. Educators are getting the opportunity to learn about CBE and performance assessments and to enact these practices in their classrooms. For instance, Mary and Rene were able to operate as an informal "school within a school" in which CBE principles and practices are thriving despite the "program failure" of the greater CBE effort. Furthermore, Marissa knew very little about CBE or performance assessment when she joined the MiPAC cohort. She has subsequently introduced these ideas to a few teachers and is actively working to cultivate their further learning and interest. These educators may not have made changes if not provided the opportunity to learn and the space to experiment with new ideas and like-minded colleagues. This report concludes with four recommendations:

1. Provide capacity-building opportunities for interested educators and make provisions for them to enact CBE and performance assessments in ways that reward volunteers (i.e., inducements) to collaborate with like-minded peers. This seems to be a small but necessary first step. Capacity-building should focus on robust opportunities for teachers to learn that extend far beyond their being "coached." Such learning opportunities should embrace the Learning Forward *Standards for professional learning* that include:

   o Learning in professional communities.

   o Integrating theory, research, and models of human learning.

   o Aligning professional learning with desired student learning standards.

   o Using data to plan, assess, and evaluate professional learning.

   o Sustaining support and resources needed for change.

2. Bolster district capacity and teacher capacity concurrently. While not thoroughly investigated in this report, we did not discover any well-articulated district Theories of Learning that clarify instructional or organizational expectations, support the district's portrait of a graduate, and provide a rationale for Competency-Based Education that can be shared with diverse stakeholders. We suggest Districts will benefit from developing a Theory of Learning that can guide their CBE work specifically and complement their other efforts (e.g., equity and inclusion) and tighter alignment to their assessment practices.

3. Explore ways to alter structures (i.e., systems changing) that provide greater flexibility needed for CBE and performance assessment implementation. Blanket initial imposition of structural changes school or district-wide without consideration of issues related to school governance and politics is likely to damage a school community in ways that outstrip the benefits and will also lead to uneven

implementation. Districts interested in implementing CBE should take great
care in explaining how CBE works, eliciting input from stakeholders, including teachers, parents, community members, and students, and responding to questions and concerns as they co-construct the CBE program. Furthermore, districts should consider flexibility in implementation that allows for those who support CBE principles and who are willing to enact them to work together to experiment with CBE and, hopefully, enlist more widespread involvement over time.

4. Continue to offer inducements and capacity-building opportunities for latecomers and new hires. Many educators may change their minds about CBE and performance-based assessments if they see them being successfully implemented by their colleagues. They are also likely to appreciate a non-compulsory approach as a signal that their professionalism is valued.

5. Avoid mandates. Mandates are likely to be counterproductive and may harden resistance, strain relationships, and lead to bitterness and resentment. Mandates may also weaken the resolve of volunteers who, under CBE and performance assessment mandates, find themselves at odds with their colleagues.

While this report highlights some of the challenges and pitfalls of CBE and performance assessment implementation, it also points to the importance of starting with a group of enthusiastic volunteers who can learn about CBE and performance assessments and then spread their enthusiasm and knowledge to others. This approach will likely stimulate greater knowledge and support that moves schools closer to desired outcomes.

APPENDIX A
Perceived Confidence with CBE Elements

CBE Element	Not Confident	Somewhat Confident		Very Confident	Not
Organizing curriculum and instruction to focus on a broad and holistic set of student success outcomes for college, career, and lifelong learning	1	5		10	
Setting clear and measurable learning expectations that include levels of student performance required for mastery	0	5		11	
Drawing on pedagogical principles of learning sciences when teaching	0	6		9	
Taking into consideration student-directed learning pathways, including student voice and student choice	1	5		10	
Designing instruction to provide students with timely and differentiated support	0	8		8	
Providing daily flex learning time for students	2	5		7	
Using flexible learning time to provide students with strategic, scaffolded instruction	2	5		6	
Embedding the formative assessment process in the personalized learning cycle	1	5		9	
Using summative assessment practices in the personalized learning cycle	2	5		8	
Employing student self-and peer-assessment	0	7		8	
Constructing or administering performance assessments that facilitate the transfer of knowledge to challenging new contexts	1	7		6	
Working with students to clarify the next steps for their individualized learning	1	9		6	
Using student assessment information to plan for my own professional learning	1	3		10	
Communicating student progress in ways that support the learning process and student success	1	5		9	
Closely monitoring the growth and progress of students based on their learning pathways, not just grade level	1	7		5	
Communicating student progress through evidence-based grading, including learning academic content and applying transferable skills	1	5		10	
Facilitating student advancement once students have met or exceeded expectations for mastery	1	6		8	
Providing instruction until students fully learn the concept or skill	0	6		9	

Perceived Needs and Interest in Learning about CBE Elements

CBE Element	Low Need/Low Interest	Low Need/High Interest	High Need/Low Interest	High Need/High Interest
Organizing curriculum and instruction to focus on a broad and holistic set of student success outcomes for college, career, and lifelong learning	3	2	5	6
Setting clear and measurable learning expectations that include levels of student performance required for mastery	1	5	4	6
Drawing on pedagogical principles of learning sciences when teaching	0	6	5	5
Taking into consideration student-directed learning pathways, including student voice and student choice	1	0	7	7
Designing instruction to provide students with timely and differentiated support	2	4	3	7
Providing daily flex learning time for students	1	4	4	7
Using flexible learning time to provide students with strategic, scaffolded instruction	0	5	6	5
Embedding the formative assessment process in the personalized learning cycle	1	4	5	6
Using summative assessment practices in the personalized learning cycle	3	3	6	4
Employing student self-and peer-assessment	2	0	7	7
Constructing or administering performance assessments that facilitate the transfer of knowledge to challenging new contexts	1	2	5	8
Working with students to clarify the next steps for their individualized learning	1	3	6	6
Using student assessment information to plan for my own professional learning	4	2	2	8
Communicating student progress in ways that support the learning process and student success	3	4	2	7
Closely monitoring the growth and progress of students based on their learning pathways, not just grade level	2	4	7	3
Communicating student progress through evidence-based grading, including learning academic content and applying transferable skills	3	1	7	5
Facilitating student advancement once students have met or exceeded expectations for mastery	3	5	4	5
Providing instruction until students fully learn the concept or skill	1	5	4	6

APPENDIX C. CBE QUALITATIVE INTERVIEW PROTOCOL

The purpose of this interview is for me to understand your context the way you see it and to understand how you make meaning of your experience both in education broadly and Competency-Based Education in particular.

The first set of questions has to do with your general experiences in education.

1. **Please describe your experience in education and your current role.** (probe for how long the informant has been in his/her current role and how prior experiences prepared the informant for their current role).

2. **What is it like to be a principal/teacher/instructional coach at this school?** (probe for challenges that the educator faces, in general, and for general affordances offered by the school)

The next set of questions asks about your experiences with the CBE program.

1. **I'm interested in how Competency-Based Education connects with local schools. Can you describe how CBE came to your school and how you became involved in it?**

2. **What single word would you use to characterize your role in the CBE at your school? (probe for why this word is an appropriate depiction of involvement). In a perfect world, would the word you chose match what you hoped your involvement would be? Why or why not?** (Probe for how the CBE project has affected the informant personally and professionally; probe also for facilitators and barriers to CBE implementation)

3. **What single word would you use to characterize how CBE has affected your school?** (Probe for how CBE has influenced teacher collegial interactions/teacher principal interactions/instructional practice, etc.)

4. **How do you envision using the Performance Assessments that you are helping develop as part of this project?**

5. **I would like you to list all the places where you have heard Competency-Based education being discussed either formally or informally. Once you have listed all of the places you can think of, I'm going to ask you a set of questions.** (Fill out a card for each new place the informant lists—For example, the informant might say "staff meeting" or "teachers' lounge").

   a. **Can you describe the most recent _____ when CBE was discussed?**

   b. **Who would typically be present when CBE is discussed at a_____?**

   c. **What types of things might I hear someone say if they were talking about CBE in a _____?**

   d. **What is your role when CBE is being discussed in a _____?**

   e. **Finally, I'd like to understand how discussions about CBE and CBE-related activities might be different in different places. For this purpose, I am going to select two cards—each with a CBE location listed on them—and ask you to list as many**

differences as you can think of. (Interviewer will select two
locations and then continue until all the possible combinations have been explored)

6. **Next, I have prepared a set of index cards. Each card has the name of an educator from your school. I'd like you to sort the stack into two or more categories when you think of Competency-Based Education. I am not trying to isolate or evaluate educators at your school but rather to understand the types of educator involvement in CBE that might not be evident to the outside observer.** (When the informant is done sorting the cards). **Please tell me about how you decided to sort the cards.** (Probe for the defining characteristics of each category and how each category influences the implementation of CBE.

7. **Finally, I am interested in how different levels shape Competency-Based Education at your school. First, please explain to me how the district influences CBE.** (Probe for facilitators and barriers). **Next, please tell me how the principal/instructional coaches affect CBE implementation.** (Again, probe for facilitators and barriers). **Now I'd like you to explain how parents affect CBE implementation.** (Again, probe for facilitators and barriers). **Finally, I'd like you to explain how the students themselves affect CBE implementation**. (Again, probe for facilitators and barriers)

Thank you for your time. I appreciate getting to know more about your work contexts and your experiences. I will be in touch about a follow-up interview if you would be willing to participate.

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