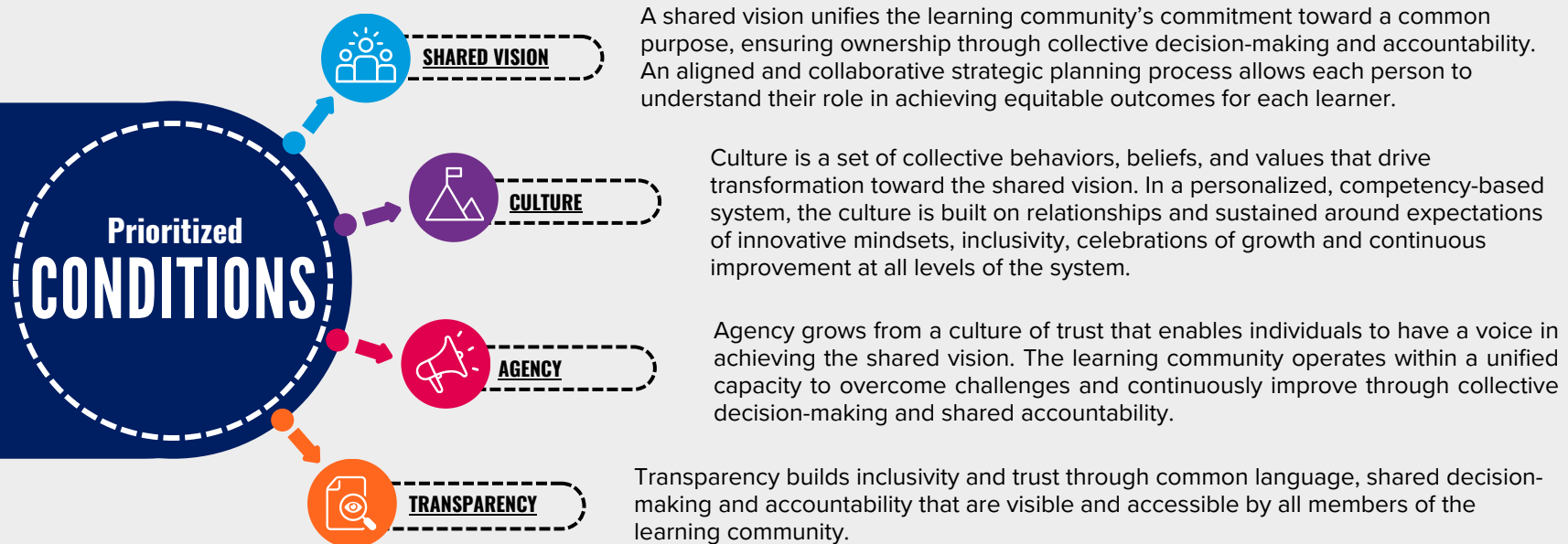# PERSONALIZED, COMPETENCY-BASED LEARNING
Self-Assessment Tool

Systems-level reflection and action planning provide the foundation for learning communities to develop their own path toward aligned, sustainable transformation. Through research with districts across the country who are working to scale personalized learning systems, KnowledgeWorks has identified conditions that must be refined and aligned toward the shared vision for teaching and learning. To effectively move systemic transformation forward, learning communities should prioritize work on their **shared vision**, **learning community culture**, **collective and individual agency** and **transparency**.

Prioritized **CONDITIONS**

SHARED VISION

A shared vision unifies the learning community's commitment toward a common purpose, ensuring ownership through collective decision-making and accountability. An aligned and collaborative strategic planning process allows each person to understand their role in achieving equitable outcomes for each learner.

CULTURE

Culture is a set of collective behaviors, beliefs, and values that drive transformation toward the shared vision. In a personalized, competency-based system, the culture is built on relationships and sustained around expectations of innovative mindsets, inclusivity, celebrations of growth and continuous improvement at all levels of the system.

AGENCY

Agency grows from a culture of trust that enables individuals to have a voice in achieving the shared vision. The learning community operates within a unified capacity to overcome challenges and continuously improve through collective decision-making and shared accountability.

TRANSPARENCY

Transparency builds inclusivity and trust through common language, shared decision-making and accountability that are visible and accessible by all members of the learning community.

Self-Assessment Steps

This self-assessment is designed to reflect on the progress of the district. While evidence will come from classrooms and buildings, this tool is not meant to be an assessment for an individual school. The tool is intended to examine the educational experience and systemic supports needed as students progress from Kindergarten (or Pre-K) through 12th grade. Follow the steps below to complete your self-assessment.

1 Self-Assessment Worksheet
Use pages 5-8 to complete the worksheet on page 2

2 District Focus Area
Page 2

3 Gap Analysis
Page 3

4 Steps to Address Gap
Page 4

5 Repeat Steps 2-4 for Add'l Focus Areas
Page 4

Self-Assessment Worksheet

1 **Self-Assess**

Identify district's current level for each competency area by using the progressions on the indicated pages. Mark the current level below and use the notes section to capture evidence. It is common for districts in the beginning stages of their personalized, competency-based model to score themselves mostly at the establishing or developing levels.

Condition	Competency Area	Establishing	Developing	Operationalizing	Notes/Evidence
SHARED VISION See page 5	EQUITY-DRIVEN				
	STRATEGIC PLANNING				
CULTURE See page 6	CULTURE OF INNOVATION				
	RELATIONSHIPS				
	CULTURE OF CONTINUOUS IMPROVEMENT				
	CELEBRATIONS				
AGENCY See page 7	GOAL SETTING				
	VOICE				
	COLLECTIVE EFFICACY				
TRANSPARENCY See page 8	COMMON LANGUAGE				
	COMMUNICATION				
	PROCESSES and PROCEDURES				

2 **District Focus Areas**

Reflect on your self-assessment from step 1. Now prioritize one competency area that you might focus on as a district.

Condition: _____   Competency Area: _____

Self-Assessment Worksheet

3 **Gap Analysis**

1 Use language from current level of the appropriate competency progression from the following pages.

What is the gap between the present state and desired future?

2 Use language from next level of competency progression. For example, if you marked your present state as establishing, use the language from the developing box for the desired future

3

District Focus Area (from step 2) Condition: _____ Competency Area: _____	Present State	Gap	Desired Future

EXAMPLE

District Focus Area (from step 2) Condition: __Agency__ Competency Area: Collective Efficacy	Present State	Gap	Desired Future
	Developing\n\nGrowing connections, beliefs in one another and resiliency through meaningful professional collaboration, problem-solving and decision-making that focus on the impacts and effects of all learners.\n\nLearning community moves beyond a culture of compliance to a collaborative culture where members feel emotionally safe and socially connected.	• Need dedicated collaboration time that incorporates agreed upon standard operating procedures\n• Need to research and provide PD on collective efficacy (Hattie's highest effect size).\n• We need to create the conditions in which our teachers, students, and parents believe that their voices matter	Operationalizing\n\nThe learning community believes and values its collective capacity to demonstrate resilience and overcome challenges in order to realize levels of impact that make the greatest difference to the outcomes for all learners.

Self-Assessment Worksheet

4

Steps to Address Gap
Write down a few of the first steps you can take to achieve your desired state.

5

Optional: Repeat steps 2-4 to add an additional focus area

More to Explore Resources

There's always more to discover! Explore the additional resources for each condition to learn more.

SHARED VISION

- A Shared Vision
- Coming Together in Shared Values
- What a Portrait of a Graduate Is
- Six Tips for Engaging Your Community in the Visioning Process

CULTURE

- 5 Goals to Set This Year for a Strong Classroom Culture
- 5 Considerations for Shifting Leadership Mindsets
- 5 Strategies to Support Relationships for Greater Personalization
- If You Aren't Celebrating Growth, Are You Growing?

AGENCY

- 10 Ways to Encourage Student Voice
- Shifting the Thinking to Learners with Authentic Voice and Choice
- Learner Profiles
- The Learners Are Wondering When We Will Get Together

TRANSPARENCY

- Building Stronger Connections Through Effective Communication
- Using Your District Budget as a Tool for Trust
- Why Standard Operating Procedures Are a Necessary Foundation
- The Difference Between Traditional Education and PCBL

Policy Support

Need resources that can help you strategically use current state policies to aid in your transformation effort?

Check out the Policy Primer and Innovation Guide found on the Personalized and Proficiency Based Learning page!

Competency	Establishing	Developing	Operationalizing
EQUITY-DRIVEN Learning communities will create an equity-driven shared vision that drives decision-making at all levels of the system	Examine the current district data story, practices and beliefs, including how it has impacted historically marginalized populations, to establish purpose of shared vision The learning community recognizes that moving toward personalized, competency-based learning requires deep examination of assumptions, beliefs and practices, as well as clarity of purpose and action in the formation of a new vision	Exposed inequities guide the process for creation of a shared vision; the learning community and its partners use a collaborative process of building equity-driven shared vision There is collective commitment to the co-created shared vision	The shared vision provides context for data-driven decision-making at all levels of the learning community through the implementation of a strategic plan Each member of the learning community and its partners can articulate the shared vision, the intention of the shared vision and their role in the vision; the learning community holds themselves and each other accountable for the equitable outcomes of the shared vision
STRATEGIC PLANNING The strategic planning process is championed by district leaders and leaders have an understanding of the plan Begins to connect the strategic plan to the shared vision	Individuals have opportunities to observe and reflect with each other around successes, mistakes and struggles, beginning to work on resiliency Creating a space to allow learning community members to learn about and practice the components of effective relationships (see culture) to build trust and belief in one another	Representatives of the learning community give input in a collaborative process on the strategic design The strategic plan is aligned to the shared vision Gather, examine and make meaning of data related to the strategic plan	The shared vision and strategic plan are aligned and are the primary lenses through which all learning community members make decisions and view successes and opportunities for improvement

Competency	Establishing	Developing	Operationalizing
CULTURE OF INNOVATION Learning communities will foster a culture of innovation through safe, inclusive enviornments	The learning community is learning how to move from a culture of compliance to a culture of innovation where risk-taking and resilience are valued Pockets of innovative problem-solving exist and are celebrated	The learning community creates a safe space for innovation where risk-taking and resilience are encouraged; individuals are learning about their role in the culture of innovation in order to collectively shift the system	A culture of innovation with reflective cycles to achieve the shared vision is embedded in the learning community
RELATIONSHIPS Learning communities will cultivate and sustain authentic relationships through inclusivity, belonging and connectedness	Opportunities exist for individuals to learn about trust, inclusivity, belonging and social and emotional practices	Learning community prioritizes healthy and inclusive relationships and creates a strategy to monitor them Strategies exist for learning community members to discuss and reflect on unique passions, talents, preferences, interests, strengths and areas for growth Procedures in place to collectively analyze climate and belonging data	Use of climate and connectedness data cycles to inform, adjust and modify structures and approaches to relationships in order to meet desired outcomes Processes are in place for the learning community to apply their strong sense of self, building positive personal and cultural identities, leading to greater empathy and collective efficacy
CULTURE OF CONTINUOUS IMPROVEMENT Learning communities will demonstrate the ability to sustain a culture of learning, reflecting and adjusting	Continuous improvement practice exist in pockets Establishes opportunities to learn about continuous improvement tools and processes	Continuous improvement tools and processes have been adopted and are practiced at the district-, school- and classroom-levels	Systemically uses continuous improvement tools and processes at all levels of the organization Actions are taken to learn from and adjust based on the continuous improvement tools and processes
CELEBRATIONS Actions are taken to learn from and adjust based on the continuous improvement tools and processes	Celebrations exist around traditional achievement measures; leadership teams determine achievement measures	Celebrations are aligned to goals and growth measures for adult and student learners as well as the collective whole The learning community works together to determine the growth measures	There is an inclusive system in place to celebrate the growth of the learning community as a whole, honoring progress toward the shared vision

Competency	Establishing	Developing	Operationalizing
GOAL SETTING Learning communities will cultivate a personalized goal-setting system that prioritizes growth and improvement through feedback	Short- and long-term goals are individually set based on district evaluation and accountability measures Recognizing the need for a common goal-setting and monitoring process across the learning community Collective believe that goal-setting is a critical tool in the transformation personalized, competency-based learning	Common processes exist in pockets for the identification of short- and long-term goals, connected to the shared vision and strategic plan Strategies exist to reflect on progress against goals at the classroom-, building- and/or district level	Systemic processes are in place for individuals to set short- and long-term goals, based on needs and preferences, that are aligned to the shared vision and strategic plan Progress is measure against goals through data, feedback and reflection, supporting a continuous improvement loop
VOICE Learning communities will cultivate a system based on shared decision-making and accountability	Input and feedback are collected from the learning community with limited impact on decision-making	Processes to include learning community member voice in decision-making are practiced throughout the learning community	Systems are in place for learning community members to use their voice in collectively making meaningful decisions and sharing responsibility for outcomes
COLLECTIVE EFFICACY Learning communities will cultivate a belief in their collective ability to realize levels of impact that make the greatest difference to the outcomes for all learners	Individuals have opportunities to observe and reflect with each other around successes, mistakes and struggles, beginning to work on resiliency Creating a space to allow learning community members to learn about and practice the components of effective relationships (see culture) to build trust and belief in one another	Growing connections, beliefs in one another and resiliency through meaningful professional collaboration, problem- solving and decision-making that focus on the impacts and effects of all learners Learning community moves beyond a culture of compliance to a collaborative culture where members feel emotionally safe and socially connected	The learning community believes and values its collective capacity to demonstrate resilience and overcome challenges in order to realize levels of impact that make the greatest difference to the outcomes for all learners

Competency	Establishing	Developing	Operationalizing
COMMON LANGUAGE Learning communities will utilize common language that contributes to alignment, buy-in and meeting strategic goals	The district recognizes the need for common language around strategic initiatives; pockets of common language for systems alignment exist	Learning community members work collectively to identify common language and come to consensus on common terms and definitions that align to strategic initiatives	Common language (including operational definitions) contributes to systems alignment, learning community commitment and success with meeting the strategic initiatives, goals and outcomes
COMMUNICATION Learning communities will utilize a system of inclusive communication	Communication and engagement are generally one-directional, flowing from district leaders to schools and community members Information is available to those who are able to access the district-led communication and engagement strategies	Pockets of district messaging and communication activities are aligned to the shared vision and strategic plan; data is collected to determine effectiveness of communication through the learning community For the purposes of building shared accountability for the vision, the learning community practices communication using feedback loops	A strategic communication plan is implemented, regularly adjusted and inclusive of all learning community groups; communication is clear and easily accessible to all learning community groups Communication flows throughout the learning community where all members are acknowledged; feedback loops are in place to foster inclusive communication and engagement, building trust and confidence
PROCESS AND PROCEDURES Learning communities will implement inclusive processes and procedures that move the system toward realizing the equity-driven shared-vision	District processes and procedures exist resulting in a culture of compliance	To grow transparency, agency and procedural efficiency, the learning community practices using voice to design shared processes and procedures	Inclusive processes and procedures are embedded in the district culture, activating agency and fostering trust in the system