



---

## CASE STUDY IN PERSONALIZED LEARNING

---



Dr. Valerie Truesdale joined the nearly 150,000 student Charlotte-Mecklenburg School District (CMS) as the chief technology and transformation officer in October 2012. At that time, each of the almost 10,000 classrooms was equipped with three desktop computers; one-quarter of classrooms had no projection

systems, teachers had not been issued laptops and none of the 168 schools was fully connected to the Internet to support global classrooms. For two years, she and the technology services team systematically upgraded infrastructure to support all schools and classrooms with full connectivity and projection systems, issued laptops to all teachers and began the pedagogical shift to prepare teachers to increase personalized learning. In 2015, the Digital Learning Conversion began with the goal of providing a device for each student by 2017. All students in grades 3-12 now have a Chromebook to use in school. Sixty-three schools are engaged in a journey toward more personalized learning for students, based on the Whole Child.

<http://www.cms.k12.nc.us>

---

## DEMOGRAPHIC PROFILE OF CHARLOTTE-MECKLENBURG SCHOOLS

---

Enrollment: 147,910	Asian: 6%
Number of Schools: 176	Hispanic: 24%
Operating Budget: \$1.4 Billion	White: 29%
Diversity: African-American: 38%	Languages Spoken: 197
American Indian: 3%	

---

## PERSONALIZED LEARNING IN CHARLOTTE-MECKLENBURG SCHOOLS (CMS)

---

*The practice of defining what will provide joy in learning for kids and then marshalling resources toward the goal of teaching to their interests has provided an avenue to successful leadership.*

Buoyed by a succession of strong leaders such as CMS Superintendent Clayton M. Wilcox, significant national recognition of Charlotte-Mecklenburg Schools has taken place, including the 2011 Broad Prize for Excellence in Urban Education. As a result of tenacious efforts of CMS leadership, schools were encouraged to begin a journey toward implementation of personalized learning as a core instructional strategy. Dr. Valerie Truesdale summarized the commitment of the community.

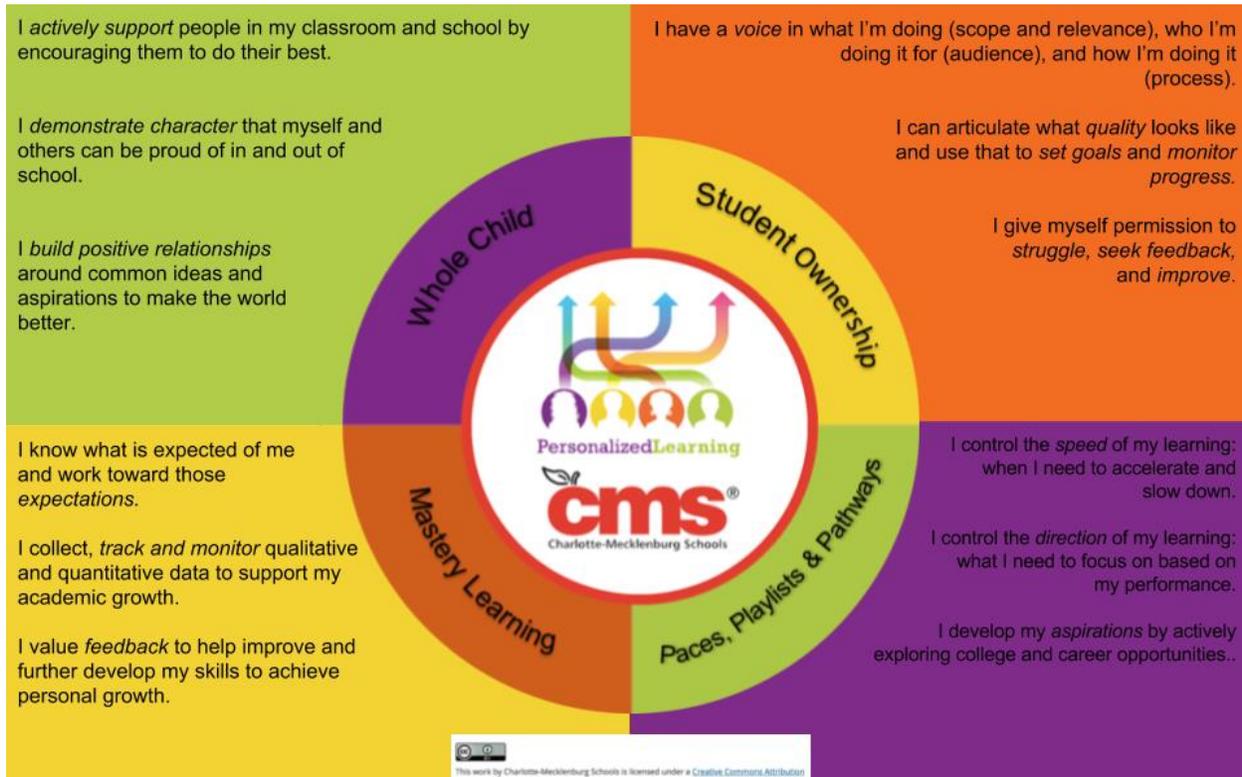
*The community is committed to equity and opportunity for all children. The district consistently performs above the state, posting 89.6 percent 4-year graduation rate in 2016 and 89.4 percent in 2017. When the state introduced a new grading system several years ago, ten of 168 schools were rated F. That number was cut in half the next year. Our goal is no F schools, 90 percent graduation rate and all students graduating with successful completion of at least one AP, IB or college class, or an industry credential.*

Essential to transforming classrooms was the imperative of introducing and sustaining a culture of personalized learning. Underpinning the drive to creating CMS's culture of personalized learning are four essential tenets:

- Develop the **Whole Child**
- Empower Children to take **Ownership of their Own Learning**

- Provide **Multiple Pathways**
- Demonstrate **Mastery Learning** in order to be successful

These tenets are defined by unambiguous statements of commitment for the students participating in their learning, leaving little question of what is expected of them in the personalized learning environment.



Source: <http://pl.cmslearns.org/what-is-cms-personalized-learning/>

While the beginning was modest with 15 schools, the growth of personalized learning in CMS has been significant. Now, 63 schools are fully engaged after just three years. The implementation plan was built around a staff development model that is radically different from what most teachers had experienced in the past. In reflection, the team found that it was not easy for teachers, principals and curriculum specialists to shed old habits and accept a new method of improving teacher effectiveness.

Essential to the professional learning and growth process is that it was not evaluative in nature. Dr. Truesdale and director of personalized learning Jill Thompson cleared the way by allowing schools to be free to take risks and define their path toward the pedagogical shift. The emphasis was on coaching individual teachers or small groups of teachers by a specialist who catered to teachers' individual growth needs while staying true to the essential tenets of personalized learning. The team accepted the fact that growth toward increased personalization is achieved in a variety of adapted measures

implemented by the teacher and emphasized respect for the teacher's role as a decision maker. The one-size-fits-all approach embraced by professional learning in the past was replaced by a teacher-driven system sensitive to their developing skills and decision-making abilities.

*Was there resistance? "Yes,"* according to Dr. Truesdale, while through the exercise of persistence and patience, experience has proved that CMS teachers welcome the respect for their decision making regarding teaching and learning in a non-judgmental environment.

At the system level, the team began by establishing a personalized learning roadmap (<http://pl.cmslearns.org/wp-content/uploads/2014/04/cms-pl-roadmap.pdf>). Development was supported initially by a Bill and Melinda Gates Foundation Next Generation grant. The roadmap was designed to guide thinking as the system grew.

According to Dr. Truesdale, it is essential that those charged with implementing personalized learning in their district continually interact with colleagues from other districts in an effort to validate important decisions impacting implementation. Collaboration with other districts engaged in personalized learning was enhanced by the interaction provided by the recent site visit by the AASA Personalized Learning Cohort.

CMS Strategic Plan 2018 was developed in 2012-13 by 22 task forces and involved hundreds of citizens. The plan cited the need for personalization as a central theme. Specifically, Goal One calls upon Team CMS to provide a *"personalized 21<sup>st</sup>-century learning environment for all students to graduate career- and college-ready."* This goal was seen as the vehicle that drove allocation of resources to support personalization and infrastructure, and sustain momentum.

(<http://www.cms.k12.nc.us/mediaroom/strategicplan2018/Documents/Strategic%20Plan%202018%20For%20a%20Better%20Tomorrow%20Fact%20Sheet.pdf>).

Dr. Truesdale and many of her counterparts around the country agree that growth of personalized learning strategies could be hastened by the addition of more staff, but are quick to say that the foundation of personalized learning focuses on coaching and developing a cadre of coaches at each school – all of which take time and patience.

According to Dr. Truesdale, sustainability is also reliant on:

*A commitment to a vision for a different pedagogical approach in an era when the role of learners and teachers is blurred. Students are teaching adults as well as adults are teaching students. The next step for us is to continue the current grass-roots effort so that personalized learning stays organic and teacher-focused as we strive to build students' ownership of their own learning. Top-down reform without buy-in from teachers and school leaders rarely works.*

With respect to accountability, CMS has actively engaged in an internal evaluation of their personalized learning program and has invited numerous outside groups to observe their progress with implementing personalized learning. Notable among that work is a recently-released report of the Friday Institute for Educational Innovation at North Carolina State University entitled *Personalizing the Paths to Personalized Learning: Meeting Students and Teachers Where They Are*. This non-technical case study highlights the efforts of three schools involved in the transition toward personalization. The material presented is candid and presents valuable insight into the path followed, challenges encountered and successes achieved. Interspersed are extraordinarily useful reflections on important elements of the process undertaken and the belief structure underpinning the transformation to a more personalized learning environment.

A series of research reports, articles and CMS evaluations of personalized learning have been collected by the CMS team and prove useful for those interested in studying the topic.

National Reports/ Articles Supporting CMS Personalized Learning  
<http://pl.cmslearns.org/cms-pl-in-the-spotlight/>

Evaluation of Charlotte-Mecklenburg Schools Personalized Learning Initiative  
[http://pl.cmslearns.org/wp-content/uploads/2014/04/PL-Evaluation\\_FINAL\\_9.21.16.pdf](http://pl.cmslearns.org/wp-content/uploads/2014/04/PL-Evaluation_FINAL_9.21.16.pdf)

Resources

[http://pl.cmslearns.org/wp-content/uploads/2014/04/PL-Evaluation\\_FINAL\\_9.21.16.pdf](http://pl.cmslearns.org/wp-content/uploads/2014/04/PL-Evaluation_FINAL_9.21.16.pdf)

[http://pl.cmslearns.org/wp-content/uploads/2014/04/PL-Evaluation-Year-2\\_FINAL\\_7.6.17.pdf](http://pl.cmslearns.org/wp-content/uploads/2014/04/PL-Evaluation-Year-2_FINAL_7.6.17.pdf)

<http://pl.cmslearns.org/wp-content/uploads/2014/04/2015-2016-Progress-Report-for-Personalized-Learning.pdf>

National Center for Learning Disabilities - Experiences in Practice: Lake Wylie Elementary School's K-1 Combined Class  
[http://pl.cmslearns.org/wp-content/uploads/2015/02/Lake-Wylie.Case-Study.Fin\\_.pdf](http://pl.cmslearns.org/wp-content/uploads/2015/02/Lake-Wylie.Case-Study.Fin_.pdf)

---

## FINAL THOUGHTS

---

When asked about advice she would offer other school systems leaders who wish to implement personalized learning initiatives in their districts, Dr. Truesdale responded:

*We urge districts, when they visit in our twice-annual Personalized Learning Tours, not to mandate pedagogical change, but rather invite teachers to engage in a change journey. Change management will not occur because a superintendent decrees it -teachers and school leaders have to see WHY pedagogical relationships need to evolve into 21<sup>st</sup>-century models of learning and teaching. We spent a great deal of time on the WHY and on the change process before we embarked upon designing specifics of personalized learning. We have not used consultants because then it would be “their” initiative that CMS bought for teachers. By growing personalized learning within CMS, we have the freedom to adjust and amend as teachers and principals provide feedback. It’s truly change-driven by the people closest to the classroom, which is why second order change is so impactful and long-lasting.*

---

For more information related to the American Association of School Administrator’s Personalized Learning Cohort - <http://www.aasa.org/personalized-learning.aspx>.

Mort Sherman, Ed.D.

Associate Executive Director for Leadership Services

AASA, The School Superintendents Association

Office 703-875-0726

[msherman@aasa.org](mailto:msherman@aasa.org)

Twitter @64msherman

---

### **About AASA**

[AASA, The School Superintendents Association](http://www.aasa.org), founded in 1865, is the professional organization for more than 13,000 educational leaders in the United States and throughout the world. AASA’s mission is to support and develop effective school system leaders who are dedicated to the highest quality public education for all children. For more information, visit [www.aasa.org](http://www.aasa.org).

