

Communicating Personalized Learning to Families and Stakeholders: Terminology, Tools and Tips for Success

by Karla Phillips, ExcelinEd
and Amy Jenkins, Education Elements



Introduction

While personalized learning has become part of the lexicon of many educators, its definition and implications for learners remain unclear to families, policymakers and other critical stakeholders, slowing demand for what we believe is an essential transformation of teaching and learning. In many cases it is simply the term “personalized learning”—and the associations people have with it—that get in the way of more districts embracing it.

As districts and schools look to shift to more student-centered environments, a lack of understanding, alongside a lack of knowledge of the benefits of personalized learning, remain a consistent barrier to large-scale systemic change and support. It is of critical importance that we are able to effectively communicate personalized learning not only to educators (which is hard enough) but especially to families less steeped in education jargon and practices.

Both Education Elements and the Foundation for Excellence in Education (ExcelinEd) have been advocates for personalized learning for the better part of a decade, although we each approach the work from a different angle. Education Elements works directly with school districts -- including district leadership teams, school leadership teams and teachers -- to design, implement and scale personalized learning. ExcelinEd develops state policies that provide schools the flexibility they need to innovate and the support they need to successfully implement and scale.

Through our respective efforts, we have learned that one of the biggest challenges is effectively communicating the benefits of personalized learning to all stakeholders, especially families and community members.

We also have recognized that how personalized learning is defined and described has extensive implications on stakeholder expectations of what success looks like in schools and how it is measured.

Our organizations now find ourselves at a point in time where our work is converging. We both have heard districts struggle to communicate their work and why they want to personalize education. We have read the angry op-eds and watched tension-filled board meetings. In response, we have looked for ways to address the challenge of effectively communicating about personalized learning so it becomes something families demand, not something they fear. We want to pave the pathway for districts to move forward faster and easier and with greater support.

This joint paper was borne out of a series of discussions surrounding recent national message testing conducted by ExcelinEd. Recognizing the need to create understanding and build public support, the survey questions were carefully constructed from lessons learned through research, an understanding of emerging trends and a digital landscape

report. The message testing results revealed that there are important nuances in both describing personalized learning as well as making the case for it.

Our goal is to share lessons learned from the message testing and from the experiences of the pioneers of this movement as well as to provide

resources for you to use when communicating with your communities. Our hope is that improved messaging about personalized learning will in turn create the conditions for success (including new or improved policies, school board buy-in, superintendent buy-in, etc.) in more states and districts.

The Definition Dilemma

Perhaps the primary challenge around personalized learning is our inability to agree on a definition. According to at least one analysis, [we can't decide if it's a noun or a verb](#). We can't even decide if

we should define it. And in this case, we cannot even rely on the famous quote by Justice Potter Stewart about knowing it when you see it, because we can't even agree on that.

Observations from EdWeek

To begin with, the concept [of personalized learning] is still largely ill-defined. Opinions about what it should, or should not, look like vary widely.

[Taking a Hard Look at a Movement](#)

But personalized learning also faces some unique challenges. The biggest is [lack of clarity](#) around what the term actually means. . . . In practice, though, "personalized learning" is used to describe everything from supplemental software programs to whole-school redesigns. As a result, the term has become a blank slate on to which supporters and skeptics alike project their own hopes, fears and beliefs.

[The Cases Against Personalized Learning](#)

For the purposes of this paper, we will use the following working definition from the International Association for K-12 Online Learning (iNACOL):

Personalized Learning:

Tailoring learning for each student's strengths, needs and interests—including enabling student voice and choice in what, how, when and where they learn—to provide flexibility and supports to ensure mastery of the highest standards possible.

Although definitions vary, they share one common theme: **Instruction is tailored to students.** And fortunately, it looks like the public agrees.

When ExcelinEd asked those surveyed during message testing what they thought “personalized learning” probably means, our theory was validated, that is, it appears the phrase is intuitive. Here are a few sample responses:

- “Education catered to individual students focused on their strengths and interests.”
- “Learning methods that are adjusted to best meet the needs of each student.”
- “Learning tailored to an individual student's needs.”
- “Personalized training means focusing on an individual's talents and abilities while including the basic 3 r's.”
- “It might mean learning geared to specific needs of the individual.”

Our Research and Findings

Making the Case for Change

Regardless of how personalized learning is described, we know this educational approach requires a fundamental shift in culture and mindsets. It is important to take a moment and think about how different the transition to personalized learning is from previous education reforms and to recognize that it is not, in fact, “another reform.”

Personalized learning is also not just another initiative. It is not about buying software or devices; it is not a prepackaged plan or a scripted program. It is not something that will start and stop. Instead, it reflects *progress*, growing out of what we are discovering about human learning, about how to integrate new tools that become available and about the new knowledge and types of skills our children will need to be successful in the modern world.

While these are exciting developments, they come with a reminder to exercise caution in specific messaging about personalized learning.

A helpful guideline is to convey that change is required but that it will be more of an *evolution* rather than a revolution.

In communication activities, be sure all stakeholders understand that personalized learning is the next logical step in efforts to ensure all students are college and career and citizenship ready. This will build upon on all we know and are already doing to implement good teaching practice while providing the increased flexibility and support educators need to truly put students at the center of education.

This transition can be comprehensive and will take a concerted effort and investment in time. That is why it is critical that support is built from the beginning, and the transition is embedded into the school’s strategic plan and vision. If not, there is great risk that momentum will be lost when there are changes in leadership.

Based on survey results, it appears personalized learning advocates may have tried to offer a narrative we wanted to tell rather than a message the public, especially families, want to hear. In countless presentations, we have told the “history of education” story and how schools were built for the Industrial Age, how they changed moderately in the Information Age and now need large-scale changes in the “Networked Age.” Notably, we saw these messages played out during the recent [XQSchools primetime special](#) and in countless Ted Talks [like this one](#). How many times have we simply used pictures of 18th-century classrooms

with laptops superimposed? History lessons on the stagnation of education in America make for great conversations and debates at conferences, but remember: Families typically don't have that luxury of time for academic discourse on long-term trends in education.

Similarly, we have found the message point that "schools are outdated" is, in fact, not the most persuasive argument. ExcelinEd asked those surveyed if we need to think differently about how school works in America these days? A full 87 percent of respondents responded "yes," and 51 percent responded "strongly." This is not unlike previous polls, so we probed further.

We asked half of those surveyed if they feel schools in America are *inadequate* and therefore we should rethink how we educate children. Then we asked the other half if they feel schools in America are *outdated*. The difference in responses was striking. Both questions resonated well, but 42 percent "strongly agreed" with inadequate—but only 28 percent "strongly agreed" with outdated. That distinction becomes even more clear when we look at other research.

Focus groups conducted with families around the country have found that they are clearly focused on the future. Of course, this shouldn't be a surprise to us. Families are keenly aware that the world is changing rapidly and their children need to be prepared.

Parent Priorities and Concerns

The ExcelinEd project also presented a series of statements that described the benefits of personalized learning. The survey asked respondents if, after reading the statements, they were more or less interested in the schools in their area implementing personalized learning. Further, we asked them to choose any words or phrases that stood out to them as particularly important. And this is where it got interesting.

The results demonstrate that families know exactly what their students need for an uncertain future: **knowledge and skills**. Regardless of how these two terms were presented, both resonated strongly. Here are a few responses:

*Diplomas will truly represent that a graduate is prepared with the **knowledge and skills** to succeed after graduation, giving employers confidence.*

*Students progress in school will be evaluated based on **knowledge and skills**.*

*Students will move to new **concepts and skills** when they demonstrate mastery of the skills that need to come before it.*

A [similar project](#) conducted by the Alliance for Excellent Education (All4Ed) asked families their top concerns. “*Students are not learning the knowledge and skills they need in the real world*” was their second highest concern.

Make It Personal

In the All4Ed survey, the highest concern of families was this: “*Schools have a one-size-fits-all approach to teaching students, leaving behind those who are confused or struggling.*” Other organizations have conducted national focus groups and found similar results [Authors’ note: Widespread sharing of those results was still pending at time of publication of this paper.] Terms such as “cookie-cutter,” “one-size-fits-all” and “square peg-round hole” resonated strongly with families.

Families inherently recognize that their children are unique and special. They know children need and deserve an education that respects, honors and leverages their child’s unique strengths and interests.

It’s not a coincidence that other studies confirmed that the messages resonating best were ones that conveyed how personalized learning can provide individual student help and support. Responses included these descriptions:

- **Understand** each student’s personal and academic background, strengths and needs.
- **Help** each student develop ownership of their learning.

- **Provide** students targeted instruction, practice and support in areas where they’re struggling.
- **Helps** students communicate effectively.
- **Helps** students learn how to learn.

Winning Messages

The exact messages a district uses should have at their core the reasons why that district is choosing to personalize learning. For those tasked with conveying those messages, [understanding your why will remain a critical first step](#).

Based on results of message testing, we also believe that a few key messages should be considered and included in communications:

- **Focus on the future.**
 - *The goal of personalized learning is to ensure that our students will be adequately prepared with the knowledge and skills they need for college or career.*
- **Highlight benefits to families.**
 - *Personalized learning will provide you with a deeper understanding of how your child is progressing and will improve opportunities for collaboration with teachers*
 - *Personalized learning provides opportunities for increased interaction with teachers and peers and encourages higher levels of student engagement.*

■ Highlight benefits to students.

- *Students are encouraged to play a greater role – and be more invested – in their learning.*
- *Instruction will be tailored to a student's strengths and interest to keep them more engaged in their learning.*

- *Students can learn at a flexible pace that's right for them in order to ensure they have thoroughly learned the material.*

■ Highlight benefits to teachers.

- *Personalized learning will provide teachers with the flexibility and tools they need to meet the needs of your child.*

The Best Messengers? It's Teachers

The importance of teachers in framing personalized learning cannot be underestimated. Community support can literally hinge on how the role of the teacher will be perceived in new models. Your messaging must emphasize the central role that teachers will continue to play in personalized models. Families will want assurance that their student's interaction with teachers (and peers) will be strengthened.

Numerous studies and years of experience also remind us that families trust teachers. Teachers are the primary messengers to families, and so their opinions are critical. Having teacher support and buy-in from the beginning could be the linchpin to your school's success, so be sure to include teachers early in your communications planning efforts (and in personalized learning implementation!).

Lessons Learned

Through our work we have learned a lot of lessons. We have seen what works and what doesn't, and we've documented many of our experiences in [Communications Planning for Innovation in Education](#). New research allows us to offer additional and more concrete recommendations around not only what we should say, but also what we shouldn't. Here are our most important guidelines:

*First and foremost:
Avoid jargon and drastic change*

This is the mistake many personalized learning advocates frequently make. In attempting to generate excitement, we inadvertently scared the public.

This was made clear to us when ExcelinEd tested the two sentences below and received divided results. Although both sentences enhanced interest by respondents in personalized learning, certain words and phrases resonated differently, which was incredibly instructive.

The language in green was positively received, while language in red was negatively received.

Schools may change classroom design, school schedules, and use new technology tools to give teachers more flexibility to help all students.

Student grades will be based on their mastery of content and skills rather than things like attendance, participation and extra credit which don't necessarily reflect mastery.

In retrospect, we should have known how the public would react to potential changes to some of the most iconic parts of school. Experience tells us that the most effective way to ensure families attend school board meetings is to *propose a change to any schedule* (e.g., lunch, bus, summer). If nothing else, we should have remembered that no one really likes change!

Even though some of the potentially big changes in the **red** statements above may be true, experience tells us that very few of these changes will occur in the first few years of implementation. For that reason, there is little reason to raise hackles in the earliest phases of discussion.

Other Words and Phrases to Avoid:

ExcelinEd tested messages that we suspected would cause respondents to become less interested and similarly asked respondents to select the words or phrases that jumped out at them in a negative way. While the temptation is to list these words and phrases with a stern warning never to use them, we believe the bigger caution is to ensure that your messaging doesn't inadvertently lead your audience to believe these things could be true or, even worse, allow the naysayers to use your own words against you.

Here are the most important examples:

■ Standardized testing

42 percent of respondents were *less* interested when they read the statement below, and 71 percent of those respondents selected "standardized testing" as the key phrase triggering that response.

Students will be evaluated on test after test, meaning even more standardized testing in schools.



This may seem like a no-brainer, but often we use more innocuous-sounding statements such as, "Student mastery will be determined through frequent assessments." In this context we may, unknowingly, be conveying the idea of more testing. Keep in mind that the differences between formative and summative assessments are usually lost on families.

■ Student agency, voice and choice

To be frank, no one outside of education understands these terms. For that reason, it's critical to note that while increased student agency, voice and choice may indeed be goals of personalized learning, how we describe those features could give families pause. In ExcelinEd's survey, 73 percent of respondents were more interested in personalized learning after reading the sentence below, yet the phrase "have input" is what sparked concern.

Students will be able to have input into the types of projects and activities that help them learn best, increasing their interest and motivation.



Using language that is too strong can send the message that students will do what they want, when they want. Message testing has uncovered a top concern that students may not be mature enough to handle a personalized learning system. Statements that sound as if

skills to guide their own learning are a prerequisite will fuel the myth that these models are only for "some kids."

■ Technology

Describing the role of technology can be a double-edged sword and certainly must be taken into your local context and current technology use.



One study found that for respondents who say they oppose implementing digital/online learning, their apprehensions centered around replacing teachers with technology and isolating children from peers. This is also a fear shared by teachers, who worry their jobs may go away. There is indeed great risk of these misunderstandings developing if personalized learning is perceived to be predominantly digital, especially when families add their concerns about screen time and what students will be able to access online. Technology should be presented as a tool that can help enable personalized learning, especially at scale, but it cannot and will not ever replace teachers.

Tools to Create Consensus

In 2016, Education Elements teamed up with [The Learning Accelerator](#) to develop a communications guide, [Communications Planning for Innovation in Education](#). Designed for organizations as they consider how to communicate with leaders, teachers, students and families, this guide contains a wealth of artifacts, case studies and practical steps for developing a communications plan.

Our goal here is not to replicate that set, but rather to add to it with a specific lens on the messages we now know work and to focus on how we communicate not to everyone, but specifically to families.

In the communications guide, we point you to several specific resources:

- [Online FAQ Document \(Fairbanks North Star Borough District, AK\)](#)

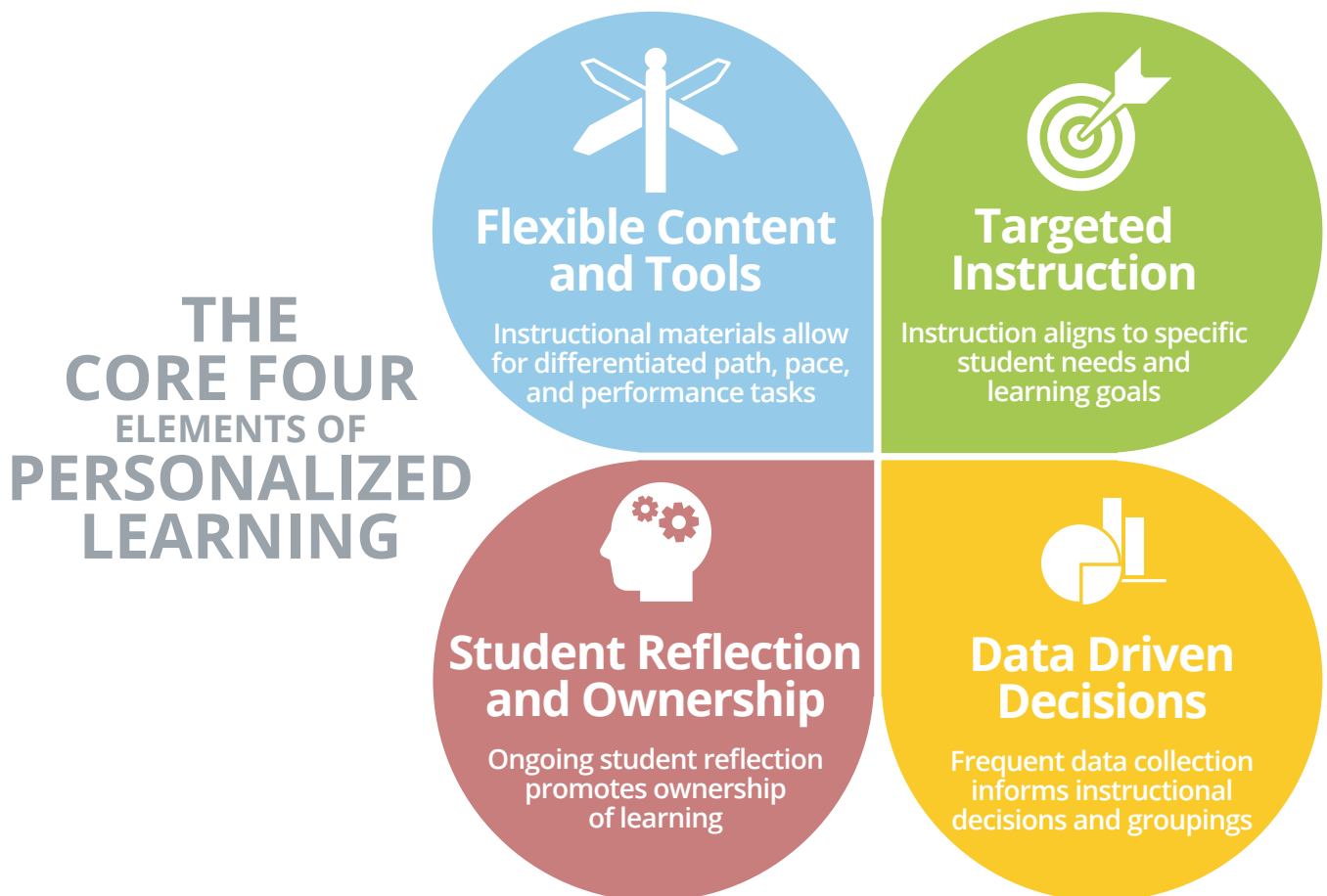
- [School Infographic \(Dolvin Elementary School, Fulton County Schools, GA\)](#)
- [Video on New Format for Parent-Teacher Night \(CICS West Belden, Chicago, IL\)](#)
- [Video on the Student Experience \(Romulus, NY\)](#)

Each of these are highly effective resources developed for families. In the time between publishing the guide and now, we have also developed the following new resources that might be helpful.

In response to concerns from families (and teachers) about screen time and the relative importance of technology in classrooms, we have written blogs

outlining all of the ways to personalize that do not include technology. You may find sharing [The Technology Trap: Can You Personalize Learning Without Devices?](#), [On this Episode of Mythbusters: Personalized Does Not Mean Digital](#), or [Six Examples of What Personalized Learning Looks Like](#) to be helpful for families, or comb through them for ideas and messages to share.

We also acknowledge that personalized learning is generally well received, but not well known. In the past, to anchor educators and leaders we have used the Core Four of Personalized Learning. [This simple graphic](#) shows how personalized learning environments include these four main elements shown below:



While an educator might benefit from a more detailed explanation of each element, such as that found [here](#), information designed for families should

break down each element by explaining the student experience with it. You can find that approach in the full families guide [here](#) or see an example below.



Data Driven Decisions

Frequent data collection informs instructional decisions and groupings

Frequent data collection informs instructional decisions & groupings

Your child's teachers use data to inform instructional decisions from what content to deliver, how, when, and in what instructional setting. This data will be collected in a variety of ways and a variety of frequency. Your student will have opportunities to explore his/her own data to make informed learning decisions. This decision-making will be scaffolded in an age-appropriate way to meet the needs of your child.

What to Do Next: Be Prepared

Interest in personalized learning continues to grow. Type the phrase into Google, and you get 13.6M results (that's 13 times the number of results for blended learning!). In general, studies show that personalized learning is well received. A majority of families like the idea of instruction that is tailored to student needs and of new approaches that provide students with the skills and knowledge they need for the future. Personalized learning is, in fact, parent friendly by design because it recognizes that each child is unique, which is something families inherently know.

At the same time, almost everyone is familiar with the traditional school experience, so it can be very hard to imagine anything different — let alone how personalized learning might work. We can guarantee that immediately after you've delivered your new, perfectly crafted elevator pitch, you can expect to begin fielding some difficult questions. Very quickly the conversation will turn to "What does this look like?" and "How would this work?"

After describing personalized learning, ExcelinEd asked survey respondents what initial questions came to mind. Responses included:

- How does it work in practice? What criteria must a student meet to advance to the next level? How is the program evaluated? What are the results so far?
- Will it hurt the students socially among their peers if they advance at a quicker rate or vice versa?"
- Who will be responsible to make sure the student fully grasps the subject at hand?
- How will mastery be determined? What will be done to prevent unmotivated students from simply giving up? Is there some sort of bias for which types of students are more likely to be able to succeed (due to resources, time, etc.)
- How do teachers keep up with students moving in different directions at different times? Seems like it would discourage group participation & discussion and maybe isolate slower students or those with various learning challenges.
- How will this play out in the classroom? Will they stay in the same class and the teacher will need to multi-task?
- How will we ensure we don't end up favoring a group of elite students while the average child is ignored?

Other studies found similar results. Questions such as "How effective is this?" "How personalized is it?" and "How do you meet all needs?" were raised in open-ended feedback questions.

Your specific answers should be based on the unique plans you have for your school. However, **caution must be exercised in answering these questions without unintentionally causing concerns and fueling opposition.** Avoid language and descriptions that could lead families to believe:

- It will cost too much to get enough teachers and materials to personalize lessons for each student.
- Teachers will be overworked and expected to do too much for too many students.
- The only way this could work would be to make the curriculum easier and set low expectations in order to make it look like students aren't falling behind.
- This could only work for some students (gifted, mature, etc).

Conclusion

The collective work of our two organizations and the conversations we continually have – with leaders, teachers, policy makers, students and families – tell us that we are on the right path with these messaging guidelines.

After implementing personalized learning, 92 percent of the district leaders we work with say that teachers are more effective, and 90 percent say that students are more engaged in their learning.

We also see dramatic academic gains. In just three years, one district we work with saw huge increases in the portion of their students who hit growth targets in reading and math. Those portions jumped from 44 percent to 65 percent in reading, and from 44 percent to 67 percent in math.

Time and again, our work provides convincing evidence that personalizing learning improves the experience students are having today by providing the flexibility needed to honor student's unique strengths and meet their unique needs, while also better preparing them for the future. We have the data and have seen the impact of personalized learning, and it's impressive! With that in mind, here are a few concluding thoughts on how you can successfully communicate this impact and need to others:

- **For district leaders:** Make sure your vision for personalizing learning is clear, that your “why” is commonly understood and that you develop messaging that makes sense for your entire community, not just those steeped in education jargon. Use words and phrases that work.

Provide preferred messaging to your district staff and your principals so they don't need to start from scratch. Communicate often with your teachers, families and community.

- **For school leaders:** Talk about personalized learning whenever you can. Include examples in newsletters to highlight how it helps students, not the software you are using. Remember this is something most families want, so celebrate that you are doing it... or starting it. There is tremendous momentum behind this evolution in teaching and learning. Whenever possible, share those stories from your own school.

- **For teachers:** Hang signs in your classrooms; talk about personalized learning on Back to School Nights and during parent conferences. Help your students understand why things are different. While you are among the best messengers, your students can be a huge asset because what they perceive and what they say really impacts what families think. Invite families into your classroom and show them how you are now better supporting their children. They will thank you for it!

Our confidence in this work remains high, and our commitment to seeing more shifts across the country remains strong. Both of our organizations envision a world in which we one day stop talking about personalizing learning because learning is *always* personalized. It is now our collective responsibility to share those messages and advance teaching and learning for all students.

About the Authors

Karla Phillips

Karla Phillips is the Policy Director for Personalized Learning at ExcelinEd. Previously, she served as Special Assistant to the Deputy Superintendent of Policy and Programs at the Arizona Department of Education. Karla also served as the Education Policy Advisor for Governor Brewer and as the Vice-Chair of Arizona's Developmental Disabilities Planning Council. Her experience includes serving as Director of State Government Relations for Arizona State University (ASU) and as a senior policy advisor for Arizona's House of Representatives. Karla received her B.A. from Indiana University and an M.P.A. from Arizona State University.

ExcelinEd

Launched by former Florida Governor Jeb Bush in 2008, the Foundation for Excellence in Education (ExcelinEd) supports state leaders in transforming education to unlock opportunity and lifelong success for each and every child. From policy development to implementation, ExcelinEd brings deep expertise and experience to customize education solutions for each state's unique needs. Focused on educational opportunity, innovation and quality, ExcelinEd's agenda is increasing student learning, advancing equity and readying graduates for college and career in states across the nation.

Amy Jenkins

Amy Jenkins is the COO at Education Elements. She started her career as a middle school teacher, co-founded the local branch of a non-profit after-school program, and worked at both NewSchools Venture Fund and Monitor before joining Education Elements. Amy has been published in multiple education publications and a speaker at conferences across the country. Amy has an MBA from Harvard Business School and an AB from Dartmouth College. She lives in San Carlos with her two precocious and raucous daughters.

Education Elements

Education Elements works with districts to build and support dynamic school systems that meet the needs of every learner, today and tomorrow. They take the time to understand the unique challenges school leaders face, and then customize the Education Elements approach for each district. Ed Elements has worked with hundreds of districts across the country. They bring deep expertise, design thinking, expert facilitation and the spirit of collaboration, along with their extensive toolkit of resources and technology, to deliver sustainable results.