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WHEN I GROW UP...

Human Capital Management: Developing a Strategy for Success in a
Personalized Environment

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Introduction

The goal to educate today's youth within the rapidly evolving global economy sits at the core of Matchbook Learning's (MBL) mission to turn around the bottom performing schools in our nation. The re-imagining of how students in the bottom 5% of schools will become college and career ready is a task that must be achieved in order to begin to close the achievement gap that exists amongst this population of learners.

To achieve our mission the Matchbook model is strategically designed to place instructional emphasis on meeting the individual student where he/she is ready to learn, creating academic growth using competency based learning practices derived from the Student Centered Learning (SCL) & Blended Learning (BL) model. Within this framework, students move at their own pace through an individualized learning path, allowing teachers to meet students where they are ready to learn. The organizational human capital model discussed in this paper has been designed to support our processes to hire, onboard and develop the team.

The MBL core team has developed a strategic human capital model and professional development platform based on a continuum format, allowing for its continuous improvement as the model flourishes. Starling's work in *Managing the Public Sector* discusses the importance of a strong organizational design. He explains, "Organizations that are truly results oriented—whether public, nonprofit, or for-profit—consistently strive to ensure that their day-to-day activities support their organizational missions and move them closer to accomplishing their strategic goals...If done well, strategic planning is continuous and provides the basis for everything the organization does each day" (2011, p.235). When describing their framework for creating a coherent organization in schools, Childress, Elmore, and Grossman explain, "At the heart of the framework is the *instructional core*...In order to improve student achievement, a district office must continuously strengthen this core by increasing teachers' skills and knowledge, engaging students in learning, and ensuring that the curriculum challenges students academically" (2006). At Matchbook Learning, the commitment to staff and students gives validity to an intrinsic belief that the teacher is the engine that drives student achievement. While other elements of the MBL organizational model, such as our individualized playlist and SPARK, Matchbook's exclusive digital ecosystem, are also key to impacting student achievement, it is our human capital strategy that will create the lasting organizational and cultural sustainability necessary to achieve the core mission.

As we provide a student-centered approach to learning for our students, our organizational human capital strategy is teacher-centered, having aligned processes and procedures, outlined implementation practices, and evaluation tools for accountability. Consider this statement, "Researchers examining the performance of public school districts had this to say about strategy in the education arena: The term 'strategy' is widely used in public education...but it generally doesn't mean

much...About a third of districts studied trotted out thick binders that they called strategic plans, which were loaded with pages of activities that lacked rhyme or reason” (Childress, Elmore, and Grossman, 2006, Niven, 2009, p.132). Matchbook operates with purposeful implementation practices, understanding that “The Strategic Plan is a necessary foundational component containing the blueprint to promote organizational change, yet it cannot stand-alone...it will become another useless binder on the bookshelf in your office unless the people of the organization breathe life into the pages” (Hurst, 2014).

The purpose of this paper is to create a framework that may be used as a resource to help organizations as they develop a strategic plan or consider organization reform. This body of work will explore MBL’s human capital framework model in the following areas:

- The Importance of Designing a Human Capital Strategy (Roadmap)
- Unpacking expected Organizational Outcomes into Vital Behaviors, Core Competencies, and Personality Traits
- MBL’s approach to Training & Developing the Team

The intention is to spark the internal discussion within organizations that have determined they have a need for reform around the approach to human capital within their school(s), and give a framework for those schools and/or districts that may be interested in personalized learning.

The Matchbook Mission: Giving Teachers & Students the Ability to Succeed

Matchbook’s mission is to turnaround K-12 public education in America by proving replicable turnaround school methodology in the toughest of conditions. Matchbook Learning’s approach of how we achieve this vision will be to serve students who are currently in bottom 5% schools, utilizing our personalized learning educational model with the existing population of students, turning them into top 20% schools. Students in bottom 5% schools are academically behind 2, 3, and even 4 years or more below grade level, which is why Matchbook Learning has designed a unique personalized model to meet every student where they are regardless of age or grade level.

The Matchbook Learning model of student-centered learning provides teachers with the ability to meet all students’ learning needs in ways that have not been previously possible. The model gives students choice, the ability to own their own learning, and the ability to succeed in a personalized environment. This begins with the dynamic teacher. According to TNTP’s work, *Reimagining Teaching in a Blended Classroom*, “An effective blended learning model requires teachers who are independent, creative and technologically savvy and offers those educators the opportunity to apply their talents in a high-impact and fast-paced work environment” (TNTP, 2014, p.5). The Matchbook model is designed to promote both teacher and student growth.

Starting with the Outcome in Mind: The Matchbook Instructional Approach

Before we could effectively begin the process of recruiting this innovative team of teaching professionals, we had to first develop a roadmap that would outline the path to guide our human capital efforts, starting with recruitment, and then focusing on our unique individualized professional development practices that will build our talent pipeline. “A well-conceived and skillfully executed strategy provides the specific priorities on which you’ll allocate resources and direct your energies” (Niven, 2008, p.134). The expected organizational outcomes and the instructional model are the critical components necessary to identify the vital behaviors, core competencies, and personality traits of the ideal MBL candidate(s).

Matchbook Learning’s educational philosophy is that through personalizing instruction for students and teachers, meeting them where they are academically, and progressing them forward based on demonstrated mastery of both skill and competencies, they will be successful. It is our belief that guiding teachers to personalize their instruction by leveraging technology they will move students to true agency which in turn will transform their individual performance, moving the school out of the bottom 5%.

The key education component that makes up the structure of the Matchbook educational philosophy is student centered learning (SCL); however, within this framework exists another equally important element: blended learning (BL). The broad definition of blended learning created by The Clayton Christensen Institute and adopted by iNACOL in their Teacher Competency Framework is described as:

A formal education program in which a student learns: at least in part through online learning, with some element of student control over time, place, path, and/or pace; at least in part in a supervised brick-and-mortar location away from home; and the modalities along each student’s learning path within a course or subject are connected to provide an integrated learning experience (Horn and Staker, 2013, Powell, Rabbit, Kennedy, 2014, p.6).

The broad definition gives insight into Matchbook’s instructional model in a turnaround environment, while also taking into consideration that there may be other iterations adopted by some educational institutions. MBL’s concise version of defining BL can be simply explained by saying that we combine the best practices of high performing teachers with innovative and engaging online tools and practices to promote 21st century skills and critical thinking. The human capital strategic plan is structured with both SCL & BL as criteria for the development of our staff. [See the Appendix A for a detailed diagram and explanation of the Matchbook Instructional Model.](#)

Unpacking Outcomes

The Matchbook instructional model of SCL contains a detailed list of the expectations to be met by the administrative and instructional staff. Within the plan we have identified the moving parts of the classroom, and the tools used during implementation, including content and learning expectancies. How do we ensure that this all happens? Which elements are measurable? Which are most relevant to produce the expected growth of the instructor and student?

Research behind strategic planning consistently promotes developing processes to evaluate expectations and outcomes. According to Niven, “Monitoring performance, and learning from the results...will provide you with the short-to medium-term information you require to guide you ever closer to achievement of the mission” (Niven, 2008, p.158). In following traditional best practices of strategic planning, the Teacher Development Continuum (TDC) was created as a rubric outlining the expected progression of the teaching staff through the MBL instructional model. See visual diagram in Appendix B

The TDC at a glance is constructed using a simple template design composed of five SCL & BL model specific domains that will be used as a gauge for teacher development: SCL Learning Environment, Technology Integration, Progress Monitoring, Student Ownership, Student Product. The areas of measure are listed as Practicing, Developing, and Accomplishing, where Practicing depicts a teacher performing at a minimum expectation level, to Accomplishing, where a teacher would be considered to be performing at a very high level of the instructional model. It is also important to note that each area of measure is interdependent; building on one another as the skills progress across the continuum and growth occurs. The development of the TDC was not such an easy task; the document embodies the most critical functions of the instructional team to be performed in a Matchbook school. The heavy lift is developing the expected outcomes and goals that follow. The goals are important, for they must be strategic and measurable. According to Starling, “Once goals have been determined, managers may select a planning approach most appropriate for their situation”(2011, p.213).

One mistake that is commonly made by administrators and districts is that the goals to be measured may have good intentions to support the growth of their instructors, yet there is often a lack of objective support processes and structures derived to ensure implementation. One pitfall that we needed to avoid was to create a culture where observations are feared and feedback is primarily subjective in nature and beholden to the school leaders’ inspection during his/her annual evaluation time coupled with year-end reviews. If a measure is created for purpose, then it must be constantly revisited. The book, *Influencer*, offers some wisdom behind this concept, the authors explain, “Measurement is an integral part of the change effort, and done correctly, it informs and drives behavior...A measure won’t drive behavior if it doesn’t maintain attention if it’s rarely assessed—especially if other measures are taken, discussed, and fretted over a hundred times more frequently” (Grenny,

Patterson, Maxfield, McMillan, & Switzler, 2013, p.22-23). The TDC, if used properly, is a valuable resource that has the power to become a foundational tool to build the desired culture centered around collaboration, observations, and constructive feedback based on evidence, removing the stigma that sometimes accompanies this process. Know what you want, when you want to accomplish it, and what the measures will be. The supporting tools and support processes will be discussed later in our work.

Vital Behaviors

The Teacher Development Continuum serves a second function of unlocking the Vital Behaviors needed to be successful as an MBL instructor. By outlining the performance expectations of the MBL instructional staff we can begin to unpack the vital behaviors that are specific to those of the teacher who has achieved performance at the Accomplishing stage of development. Traditional teaching practices nonetheless remain to be the foundation behind the Accomplishing teacher in the SCL environment. The Matchbook model allows that innovative teacher to maximize his/her creativity, provides opportunities for collaboration, and creates a culture and climate for inclusion and personal development. Research conducted by TNTP expands on this idea innovation and creativity in their work with explaining the traditional teaching environment vs. blended learning schools, they state that “In traditional school models, teacher roles are essentially uniform--usually responsible for the entirety of instruction--but a blended environment is more fluid. Technology enables considerable creativity in how classrooms are designed and managed, allowing teams of teachers and schools to be unshackled from the traditional one-teacher-must-do-all model” (TNTP, 2014, p.2).

Vital behaviors are defined as those few (usually 1-2) actions needed to enact the desired change (Grenny, Patterson, Maxfield, McMillan, & Switzler, 2013). In our experience with developing the staff of bottom 5% performing schools in the City of Detroit, and within our flagship Charter School in Newark, NJ, the teachers who have achieved the Accomplishing level of implementation exude the following behaviors consistently:

- Classroom Management
- Data Management
- Content Development
- Planning

Classroom Management

The skill of the teacher to create an environment where students want to learn can be termed as a key function to unlocking change. An environment with an academically focused structure, a shared expectation for learning between both the students and the teacher, and a culture of success is optimal for academic achievement in the SCL environment. Without strong and consistent management

practices, model expectations such as choice, student agency and independent learning will not take place. The Accomplishing teacher, as outlined in the TDC will be able to achieve the following:

- Develop & manage a safe classroom culture, creating an environment conducive for SCL
- The instructor must create a sound culture to allow for small group instruction and the implementation of the learning cycle
- The classroom culture must reflect an independent learning environment

Data Management

In the SCL environment student data is the lifeblood behind student achievement. Students in a Matchbook school start with an initial normed referenced adaptive assessment to determine their Spark Point, establishing the grade level content in which they are ready to learn. It is important to mention that this assessment will be taken at the start of the school year, mid-year, and again at the end of the school year to track performance and growth. Students will also work through individual learning plans, PBL projects, access standards-based content from online sources, and complete teacher-authored work. The ability to analyze and interpret student data, along with creating strategic action plans that will dictate instructional practices based on data metrics is a critical practice that must be achieved to accurately track and achieve academic growth. The Accomplishing teacher, as outlined in the TDC will be able to achieve the following:

- Develop, manage, and track strategic small groups using data assessments, (teacher, content progress, and digital programs)
- The teacher will use student data to develop instructional groups to either gap fill, or to teach using the current targets

Content Development

Innovation has been a pillar behind Matchbook Learning's success and is a skill that an instructor will need to have in their professional toolkit. In the competency-based learning environment, the instructor must understand the content expectations for all grade levels and/or SPARK points of each student that he/she will be teaching. The understanding of the Common Core standards, being able to unpack their meaning, and develop engaging Apply options to help students demonstrate mastery is vital to student achievement. Whether it is through collaboration or individual efforts, the Matchbook teacher will be empowered to create content that matches their style of teaching, and their students' interests for learning. The Accomplishing teacher, as outlined in the TDC will be able to achieve the following:

- Author engaging and aligned content, manage the online/offline curriculum in the LMS
- Instructor will develop small group lessons aligned to the desired targets

- Develop engaging Learn & Practice activities, along with rigorous and engaging Apply options that promote critical thinking, accounts for student pace and performance

Planning

An underlying component to the implementation of creating a sustainable and achievement oriented SCL environment is planning for instruction and the high level of organization required. While classroom management tends to focus on the behavior, culture, and climate of the environment, it is the planning piece that binds the processes that occur day-to-day. The management of student progression as they move through their individual learning paths, mapping the appropriate times to carry out small group instruction, and conducting individual conferences requires a great deal of organization skills and a mind for strategy implementation. The Accomplishing teacher, as outlined in the TDC will be able to ensure that:

- All authored and/or existing content in the LMS must align to the targets
- All Content/Playlists must be created to minimally keep pace with the fastest performing student
- All Apply options must provide the appropriate level of rigor as outlined by the applicable standard

Core Competencies

The identification of the vital behaviors is an important component of the human capital strategic plan. The critical behavior expectations that they outline provide the foundational framework necessary to understand the core competencies that will be sought after in a candidate for employment. As we have explained that the vital behaviors are those actions to guide the acts leading to success, the core competencies will help us create a behavior profile of those who have the potential to achieve high levels of success in the Matchbook model. Core Competencies in our framework is defined as “an underlying characteristic of an individual that is causally related to effective or superior performance” (Boyatzis, 1982, p97, Powell, Rabbit, & Kennedy, 2014, p.7). Utilizing the TDC and the vital behaviors as key levers for success in the MBL model, four core competencies rise to the top and are sought after in a potential instructor:

- Collaboration/Teamwork
- Problem Solving
- Change Management
- Implementation Strategist

Collaboration/Teamwork

One of the typical qualifications expected of any position in education is that the potential candidate be able to work as part of a team. We have learned that in the Matchbook model, teamwork and collaboration is an essential skill that must be

inherently present in our team members. A Matchbook instructor will work independently to effectively manage his/her classroom, but the overall school culture thrives on the collaboration efforts to create such resources like PBL projects, the development of common assessments, outline and share best practices, and participate in working Professional Learning Communities (PLC). Matchbook Learning has developed an educational model that has been the culmination of efforts from multiple levels of stakeholders. The collaboration of instructors, administration, students and parents has led to the program as it exists currently, and will allow for future iterations as the model evolves.

Problem Solving

The aptitude to take a situational issue, problem, or roadblock and work through it to comprise calculated solutions lends a great value to an organization and its stakeholders. Within a competency-based model of instruction, the instructor is challenged to be innovative with how they manage their classroom culture and structure, is required to develop Apply options that are engaging and promote critical thinking, along with responsibilities to interpret data to drive instructional practices. The person who is a problem solver at their core will be able to manage these expectations with confidence. While questions and issues are inevitable in this fluid ecosystem of learning, it is the person who has the skill to take a step back, reframe the situation, and develop thoughtful solutions who will have the largest impact in this environment.

Change Management

The move from a traditional approach to an SCL model of instruction can be a heavy lift for both the students and the instructor. The cognitive awareness of how students are transitioning into this new model, along with the ability to accommodate for modification techniques to support this shift is another skill in the teacher toolkit that holds great importance. Understanding that change is something that is ongoing in the realm of education, and that individuals respond to change in different manners can help practitioners forecast potential situations, allowing for minimal instructional interruptions. For example: In our experience with the bottom 5% of schools, new students consistently enroll throughout the school year. Teachers with change management skills will be aware of this issue and have a plan in place to acclimate new students directly into the classroom culture.

Implementation Strategist

Along with the management of and preparation for the model, the instructor is without a doubt, a practitioner of learning within the model. According to TNTP (2014), in practice teachers may be able to do the following:

- Create short- and long-term instructional plans that incorporate a variety of resource and tools;

- Simultaneously manage multiple learning configurations (e.g., large group, small group, independent working time), while ensuring high-quality instruction across the board;
- Accurately analyze student data to identify the data that will provide most actionable evidence about student performance; and
- Test innovative curricula and instructional delivery models, sharing what they learn with colleagues to promote school-wide achievement gains

In the Matchbook model, the practices mentioned above are an expectation. As the model is realized and evolving within the classroom, the instructor will be tasked with ensuring that the desired change is occurring organically. As you may imagine, change does not typically occur without at least a barrier or two. When this occurs there may be a simple solution needed to overcome an obstacle. The strategist is the problem solver who can create simple and/or complex solutions while managing the implementation of the model.

The core competencies outlined in this document are important to the MBL model and its functions, as they exist today. These personal skills are significant as they drive the achievement outcomes desired.

Character Traits

In this area we will further break down the core competencies describing the character traits of the individuals who hold them. What are traits? “Traits are consistent patterns of thoughts, feelings, or actions that distinguish people from one another. Traits are basis tendencies that remain stable across the lifespan, but characteristic behavior can change considerably through adaptive processes” (Carleton University). It is important to state that there is a host of personality traits and resources that have been studied in great detail, focusing on the psychology of personality. Although the Big Five Personality Traits may be referenced, this work will not go into great detail to describe how they exist within the traits listed. For our purposes, we have created a short list of character traits that are related to the specific performance outcomes desired. They are:

- Personal Ownership
- Influencer
- Adaptability
- Risk-Taking
- Grit

Personal Ownership

This trait is best described in this context as the person who internalizes the mission of the organization and the work he/she is tasked to do. For example, if an instructor is faced with the situation where student achievement has become stagnate, the teacher who exhibits personal ownership will take a step back to

evaluate their approach, look for specific areas where the disconnect might have occurred, then use another method to engage the students. The opposite and dissociative approach would be to imply that it has to be the kids, and then continue on without addressing the issue at hand. A teacher at Matchbook's first partnering school, A.L. Holmes Elementary/Middle School in Detroit, MI, says it best, "If the majority of my kids fail an assessment, it is my fault...the day I believe my kids can't learn, I will retire"(Eric Fredlund). Talk about passion. Using a pre/post testing method within his BL classroom, Mr. Fredlund would step back and reframe his approach with his students, using innovation to iterate on his implementation approach. In doing so student achievement soared, resulting in the highest ELA gains in the school. Even in the absence of complete buy-in, personal ownership of one's work can drive them to achieve results.

Influencer

The influencer is someone who has the ability to locate the areas necessary for change, and then guide individuals to carry out the behaviors and practices to achieve the change desired. "Where most of us apply a favorite influence tool or two to our important challenges, influencers identify all of the varied forces that are shaping the behavior they want to change and then get them working *for* rather than *against* them" (Grenny, Patterson, Maxfield, McMillan, & Switzler, 2013, p.14). The art of influence requires an individual to understand people, how they think, have a knack for reframing an issue based on the audience, and understand cultural practices. In the classroom there exists students with different geographical backgrounds, cultural experiences, socioeconomic status, and so on. The person with the wherewithal to internalize this will have an edge with enforcing norms, achieving student buy-in, and achieving academic expectations.

Adaptability

This trait can be described simply by stating that this person has the ability to find their way and be successful as things change. In the SCL environment there are a host of resources and tools that may change from time-to-time such as standardized and diagnostic testing, Learning Management Systems, content, etc. As processes, practices, and procedures change, hopefully with the students' best interest at the center, this person is capable of making adjustments to be successful.

Risk-Taking

Although other works done on teachers in the SCL environment may note this as a core competency, for MBL this is categorized as a desired personality trait, but with a reasonably significant level of importance. While it is not a requirement for someone to engage in risks like skydiving to exhibit this trait, the expectation is that this individual has the capacity to think of innovative approaches to situations and is not afraid to try new things because of the risk of failure. Developing creative and out of the box approaches to learning that lead to student success are welcomed within the MBL model.

Grit

While this may be considered the most important of the desired character traits, it is arguably the most complex to explain, and is nearly impossible to measure in an interview. "Grit is the tendency to sustain interest in and effort toward very long-term goals." (Duckworth et al., 2007, Duckworth, 2014). In her work on the Big Five personality traits in explanation of predicting consequential life outcomes (2014), Duckworth states:

My research has established the predictive power of grit and self-control, over and beyond measures of talent, for objectively measured success outcomes. For instance, in prospective longitudinal studies, grit predicts surviving the arduous first summer of training at West Point and reaching the final rounds of the National Spelling Bee (Duckworth et al., 2007) retention in the U.S. Special Forces (Eskreis-Winkler et al., in press), retention and performance among novice teachers (Duckworth, Quinn, & Seligman, 2009, Robertson-Kraft & Duckworth, 2014) and sales agents (Eskreis-Winkler et al., in press), and graduation from Chicago public high schools (Eskreis-Winkler et al., over and beyond domain-relevant talent measures such as IQ, SAT or standardized achievement test scores, and physical fitness."

It can be perceived that those who hold grit as a character trait will have experienced situations where they believed failure was not an option and persevered through the challenges that were faced. "In other words, gritty people believe, everything will be alright in the end, and if it is not alright, it is not the end" (Perlis, 2013). As mentioned previously, measuring grit is not an easy task, but it can be achieved. A strategy to test for grit during an interview would be to design questions geared so that the candidate can draw on past experiences requiring grit, allowing them to explain how he/she has persevered when challenges arose.

Hiring for Fit

Organizational development research and management books discuss the topic of hiring staff that are a fit for the organization. The strategic plan of organizations, nonprofit and for profit, are subject to the human capital designated to carry out the mission and vision. When administrators take the time to invest in their staffing needs and get it right, the impact is vast. Bolman & Deal state, "The organization benefits from a talented, motivated, loyal, and free-spirited workforce. Employees in turn are more productive, innovative, and willing to go out of their way to get the job done" (2008, p.141).

Hiring for fit includes hiring those who have the desired qualifications as outlined in the position description, appear to be a fit for the culture, and believe that the organization will help them achieve their goals, and vice versa. It is also important to mention that there may be candidates who may not appear to have all of the required experience desired, but they are a fit in the other categories, possessing the

ability to perform the job well. This is briefly described as hiring for potential. These individuals should not be immediately excluded; they may bring a new perspective to the organization that could exceed the experience requirements. When looking to fill new and innovative roles, there may not be a candidate that fits every category of the position description perfectly. It will be up to the team involved in the hiring process to determine what this criterion is, and how it will impact the hiring process.

Building Your All-Star Team

Onboarding New teachers

A high degree of support and clear, expressed expectations are pivotal to the success of the implementation of the Matchbook model of instruction. The support begins 2-3 weeks prior to the start of the school year with an intensive onboarding process designed to immerse staff directly into the model through a hands-on experience, permitting teachers to capture the Matchbook instructional model in real time. Matchbook has created a full Teacher-Centered course containing a complete playlist that includes standards for learning (fabricated for professional development (PD) purposes), videos, documents, and other interactive elements that simulate the workflow and learning modalities that a student would see in the classroom as SCL is realized. This new approach to professional development was developed after several years of onboarding teachers, gathering feedback, and expanding on how we could make people get to that 'aha' moment. During the early professional development trainings teachers would say, "Can you show us?" Immersing teachers into the course was exponentially more impactful than talking about the model and simply showing videos of SCL classrooms.

During the onboarding PD, the Blended Instruction Specialists (BIS) serve in the role of teacher to model the paces an instructor would take on a typical day. Within these initial two days of onboarding, staff members are able to see real teachers living out the model through video, and they have the opportunity to feel what a personalized experience is like for a student. The expected outcome is that this full immersion into the Matchbook model will create the foundational knowledge for staff members who are new to this method of learning.

Once staff members live the model, each core process is explored in detail over the next two weeks to reinforce learning. Matchbook ensures that instructors have access to meaningful and relevant data for their particular students in order to understand Spark Points, goal-setting, and small group formation. Additionally, the staff is guided through building rigorous learning applications that foster critical thinking, both independently and as part of a grade-level/subject cohort. A deep-dive into Project Based Learning and its pillars is also provided to round out the Matchbook experience. This initial series of professional development opportunities is designed to set expectations, team build, and develop confidence in a new style of instruction for today's students.

The Development Continuums

Matchbook believes that only through sustained and tailored support can the blended and student-centered environment truly come to fruition. To ensure the growth and development of all stakeholders in the model, Matchbook employs two Blended Instruction Specialists in each of its schools. The BIS are tasked with building the capacity of administrators and instructors around the implementation of a personalized learning program. This is achieved through a strategic and systematic process of analysis, observation, coaching, and relationship building.

Before instructors can be guided and developed, a rubric that clearly outlines the expectations for a blended and student-centered classroom must be created and communicated. Matchbook has designed a set of Development Continuums that serve as rubrics for all stakeholders. For teachers, five strategic domains have been identified as a road map for growth: The Student Centered Learning Environment, Technology Integration, Progress Monitoring, Student Ownership, and Student Product. Over the years, Matchbook has discovered that instructors move through the continuum at different rates. The majority of instructors will start the school year *below Practicing* then move to *Developing* before becoming an *Accomplishing* teacher in the Matchbook model. Those who make steady growth on the teacher development continuum (TDC) can aspire to become a Teacher-Leader. Five domains have been identified to help teacher-leaders continue to grow and develop: Monitoring and Modeling, Networking and Collaboration, Challenging, Listening, and Empowering. Matchbook believes the entire school community must be supported to achieve the goal of continuous improvement. Therefore, a Principal Continuum has been designed to motivate school leaders to grow professionally. Five domains have been identified for principals: Instructional Leadership, School Culture and Climate, Human Resource Management, Communication and Community Relations, Professionalism, Student Growth, and Organizational Management.

The Coaching Cycle: Observations & Coaching

The growth along these various continuums is carefully guided by the Blended Instruction Specialists, in cooperation with the Chief Learning Officer, in each building using a strategic coaching cycle. Each instructor is observed twice a week for approximately 20 minutes during each observation. The BIS team performs these observations in tandem to see the same instructional period at the same time, utilizing the teacher development continuum to ensure that they are maximizing their inter-rater reliability. Each subsequent coaching session held with the instructor will also be performed in tandem where short-term, achievable goals are developed for the instructor to complete during the next coaching cycle. The observations are recorded in a Matchbook online application that is mapped to the Teacher Development Continuum and can be viewed by the administration.

Observations are conducted on a two-week cycle, after which teachers receive one-on-one coaching from the BIS team. During each coaching session, the BIS team uses their notes consisting of evidence collected and the patterns observed in the classroom to paint a picture for each instructor of the status of their environment. The BIS team will come to the table with 1-2 short-term goals for the teacher to focus on over the next two-week cycle. Teachers are invited to contribute to this goal-setting process to ensure accountability and buy-in. The goals are later reviewed with the teacher during each coaching session. In addition to feedback and goal setting, the coaching sessions provide an opportunity for instructors to receive on-demand professional development covering specific areas that are most important to their individual improvement within the model. For example, it may be during a coaching conversation that the BIS team discovers that a teacher has questions regarding an online program, or how to leverage the learning management system (LMS). In that moment, the BIS team will provide training and solutions to help strengthen the teacher's toolbox of strategies and understanding of the different concepts within the model.

Quarterly, the focus shifts from classroom and academic feedback to an emphasis on personal and professional goals. Building relationships with teachers is an essential facet of the Matchbook model, and this tool provides a basis for a deeper discussion with each teacher. During this quarterly coaching process, teachers are encouraged to reflect on several topics strategically designed to give insight into the goals and aspirations that hold value to the individual staff member. They are: Feedback and Support, Compliance, PLC Participation, Coach-ability, Current Research, Community Development, and Long-Term Professional Goals. This last topic is of particular interest to Matchbook. The BIS team ensures that each teacher receives the support needed to achieve those professional goals, so the level of investment goes beyond the instructional model and physical classroom.

Although the TDC and the observation and coaching cycles are critical components of the Matchbook human capital model, these tools are not meant to replace the overall evaluation practices that are tied directly to the annual performance reviews of staff. It is important to mention that the formal evaluation tool(s) and performance expectations must embody the desired outcomes outlined in the TDC, along with all other specific requirements and expectations of the job being performed. Consistent expectations will lead to consistency amongst instructional and administrative staff.

Personalized Professional Development

The data collected from each phase of the coaching cycle provides the foundation for sustained professional development in the building. The BIS team is able to design and deliver opportunities that are tailored to the individual and unique needs of each teacher. Once the cycle has been implemented and internalized, whole-group PD sessions cease and are replaced by one-on-one or small group collaborative efforts that yield high engagement and long-term benefits. This strategic and

teacher-centered approach to development has produced measurable growth in both instructors and the students they serve.

Conclusion

Matchbook Learning's approach to its human capital model is outlined in this detailed plan to drive the process for the recruitment, training, and talent development; however, is not an outrageously complex design that can't be replicated. This method of strategy development is actually commonplace amongst organizations that are focused on creating a dynamic and lasting culture. It can be argued that many schools, districts, and Charter Management Organizations (CMOs) have developed strong strategic plans with the best intentions to produce high academic achievement in underperforming and turnaround schools, yet the model goes unrealized due to the processes built to support implementation. The significant difference between the success and failure of an organization's ability to create the outcomes desired is the ability to implement the components of the plan created. A sound strategic plan should not only map out the direction that the organization would like to follow, it must have a detailed focus on the human capital needs, positional expectations, along with the outlined embedded structures in place to train and develop staff, including criteria to evaluate and monitor expected outcomes.

An epidemic is stretching across the nation that reveals students are performing 2, 3, and even 4 years or more below grade level. Graduation rates have plummeted, and students are not becoming college and career ready. There exists an urgency to create a long-term change amongst the landscape of our underperforming schools. The solution will be born of the people who make up the organization, for they drive the creation of a culture and climate that will impact all stakeholders within the school, district, and ultimately the community. A truly engrained culture will have a lasting effect that will survive the typical attrition of staff. At Matchbook Learning, the teacher is highly valuable in and out of the classroom. We also believe that each team member brings a unique quality to the table, and it is the collaborative efforts of the entire team that will fulfill the overall mission. Investing in your employees, as individuals and collectively will optimize their efforts and personal goals to be successful professionally, creating a win for the organization, its stakeholders, and the employee.

Current research and management practices lend to us a great wealth of knowledge around investing in the development of human capital. Once you have the right people in place to fulfill the mission of your organization, it is only fitting that you focus on further developing the talents and skills that prompted you to hire them.

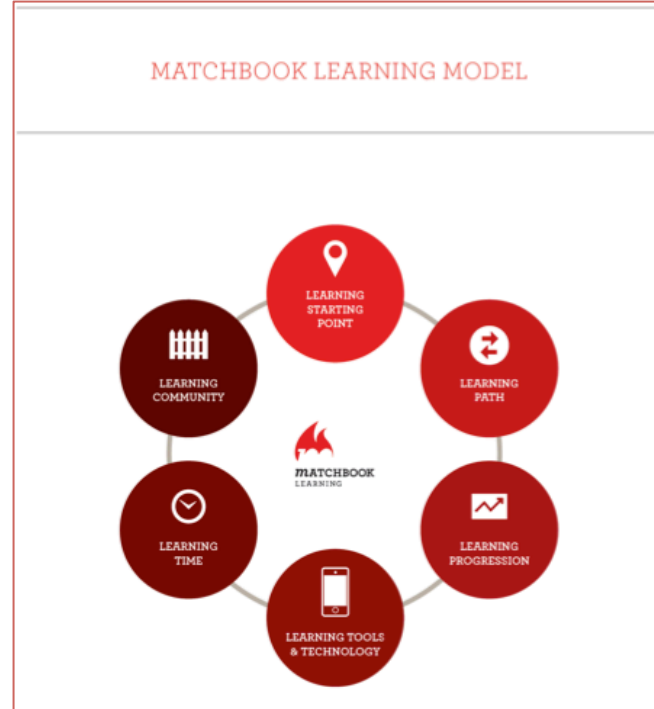
APPENDIX A: The Matchbook Learning Model

Matchbook Learning’s instructional techniques are a cohesive model of student centered learning (SCL) with an implementation and pedagogical approach that has six key elements: **i) Learning Starting Point, ii) Learning Path, iii) Learning Progression, iv) Learning Tools & Technology, v) Learning Time and vi) Learning Community.**

i. Learning Starting Point: During their first week at a Matchbook school, students are assessed to determine their starting level by core subject area. We keep students in their grade-level cohort but start them wherever they are academically in each subject. Everyone eventually crosses the same finish line, but Matchbook tailors students’ starting points according to their competencies. This approach helps to challenge students where they excel and allows the instructor to strategically focus on catching them up where they lag behind.

ii. Learning Path: Traditional schools provide students with one textbook per subject and one learning path per class. But Matchbook believes in the power of choice, so we offer numerous learning paths and let students select how to best learn a particular concept. These learning path options (think iTunes playlist) include small group instruction, one-on-one teacher conferencing, group projects, self-directed study, multi-media engagement, online games, videos, and virtual instruction.

iii. Learning Progression: Traditional schools let teachers determine when students are ready to progress. Since students move as whole classes, this often means the entire group advances when the majority is ready, leaving a small faction behind. In Matchbook’s SCL model, a student progresses to the next learning target when they demonstrate mastery of the current target. They must individually prove they can first explain their learning through conferencing and then apply what they’ve learned through projects they’ve designed. These projects are graded by the teacher as well as outside experts providing every student meaningful feedback. Then when the student is ready for a traditional assessment they will take an online assessment created with nationally vetted questions for each standard. These assessments are separate from and checked against the playlist content. The Matchbook Learning model also incorporates group project-based learning as a tool for having students dive deeply into content while learning 21st century college and career skills. To ensure that this learning is rigorous, focused, cross-curricular, and intentionally incorporating 21st century skills, Matchbook has developed a



system for backwards planning, starting with rigorous rubrics and assessment formats that were developed in collaboration with the New York Consortium Schools.

iv. Learning Tools and Technology: Traditional schools notoriously struggle with implementing and utilizing new technologies. Matchbook Learning provides the latest educational tools to their students who will use internet-ready laptops loaded with proprietary software, Google applications, and digital curriculums. We know technology can never replace a competent teacher, but when used appropriately, it can help teachers keep track of every pupil, provide students real-time feedback on their progress, and create multiple ways for students and teachers to learn.

Matchbook Learning has designed “Spark,” our exclusive Learning Management System. Spark is currently an evolving data tool that analyzes student achievement based on multiple points of learning data from online resource and assessment providers—to serve the changing, unique needs of Matchbook Learning’s educational environment. Students log into Spark to track their progress which Matchbook Learning believes will increase student ownership of learning and serve as an additional motivational factor for student engagement. Also, all student activity will become accessible to families through Spark, which will present student achievement in a way that is unique to Matchbook Learning’s school model.

v. Learning Time: Traditional schools often adopt a one-size-fits all approach to learning time. But students often learn at different paces in different subject areas. That’s why learning time in a Matchbook classroom is always varied, multi-dimensional, and student-driven. If one were to observe one of our classrooms on a given day, they would witness students using their time differently – engaging in small groups, one-on-one learning, project work, peer-to-peer learning with fellow students, student defenses of their work, and teacher-led instruction. Regardless of what one might see, Matchbook provides each student with the following:

- Weekly advisory time with teachers to discuss critical aspects of leadership development, goal setting and dream realizations
- Electives that include physical education, art, music, clubs, and social activities
- Project based learning that features real-world problem solving, external judges from the community, and oral defenses of student’s work including cold skills and concept transference assessment checks
- Early student dismissal on Friday afternoons so teachers can collaborate, review student data, and receive professional coaching


Students’ time is the most precious resource our parents are asking us to steward. Matchbook commits to managing it effectively.

vi. Learning Community

A Matchbook school is first and foremost a community and family. Families chose to attend our schools rather than being forced. We take their choice seriously. A key to

a healthy family is effective communication, so Matchbook Principals update parents on their children's progress, not just through formal means such as report cards and online data, but through face-to-face conferences, access to their student's work, group presentations, Principal "coffee talks," and updates on social media. Each parent is given the personal contact information for their student's teacher and is encouraged to reach out anytime.

APPENDIX B: Teacher Development Continuum

Teacher Development Continuum			
	Practicing	Developing	Accomplishing
		Practicing Plus:	Developing Plus:
SCL Learning Environment	Classroom routines and practices are in place to ensure a respectful learning environment, including the proper usage/handling of technology sites and equipment. Students are assigned to groups based on assessment data.	Students have the flexibility to work independently and/or in groups, based on their individual performance data.	Teacher works with a strategic small group while the remaining students are engaged in the learning cycle.
Technology Integration	Students utilize the content provided in the learning management system and meet usage requirement for district-mandated resources.	Teachers customize and manage online/offline content in the learning management system.	Students effectively utilize technology-based resources as a tool for independence in order to master learning targets.
Progress Monitoring	Teacher checks for understanding through questioning and class facilitation. The teacher utilizes assessments to monitor progress.	Teacher conferences with students one-on-one to discuss progress and set goals. Students routinely add to their portfolios. Teacher develops assessments to monitor progress.	Teachers utilize reports from all available systems to inform small group instruction.
Student Ownership	Students can identify their learning targets and are able to select from appropriate choices to build their learning paths.	Students can articulate the expectations for each learning target, set their personal learning goals, and are able to direct their learning paths.	Students are held accountable for and can articulate the life application of their learning targets and goals. Students can recognize how individual pace affects their growth.
Student Product	Student work is differentiated and aligned to standards and targets.	Work is project-based, real-world applicable, and designed to facilitate critical thinking and problem-solving.	Students are able to analyze a situation in order to frame the problem. Students play a role in the design process and are able to defend their solutions.

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