

Kathy White ([00:00:00](#)):

Hello and welcome to our session on practical tools to encourage self-direction among students for both in-person and remote learning. I am Kathy White Director of Innovative Projects at New Hampshire Learning Initiative and the project coordinator at NHLI for the BEST project. This BEST project is a collaborative endeavor, and you will hear from this group of individuals (listed on the slide) throughout the session, I just want to note that Dr. Felicia Sullivan, the lead researcher at JFF is not presenting with us today. However, she is also been a critical person in this project as the project manager at JFF. We'd like to get to know you a little bit and get a sense of where you are in terms of thinking about self-direction and what it means for students. If you would please enter in the chat, your response to the prompt, what does self-direction mean to you and how would you know that a student is self-directed?

([00:01:02](#)):

BEST is an acronym, and the term was created by the teacher leads. It stands for Building Essential Skills Today for the Future. Best is the research practice partnership formed to scale and diffuse the work study practices also known as deeper learning competencies in New Hampshire. The RPP is generously funded by the William and Flora Hewlett Foundation and is comprised of four organizations, Jobs for the Future, New Hampshire Learning Initiative, Center for Innovation and Education and the New Hampshire Department of Education. For this project, we focused on the social studies content area. There were four school districts who were part of the actual study. The teacher leads who are social studies teachers are with us today for this presentation. In total teachers from 10 districts, engaged in professional learning on quality performance assessments and work study practices supported by consulting experts from CCE, Dr. Karin Hess of Education and Research in Action, Wendy Surr of Surr Consulting and Knowledge Work Students at the Center Hub.

([00:02:09](#)):

The “why” behind our work, we are looking to elevate the teaching and assessment of the essential skills, communication, collaboration, creativity, and self-direction. We know that these are the essential skills for success. Researchers have told us and employers confirm this. BEST is working to shift how students learn and demonstrate the essential skills and how we are teaching and assessing with the same level of confidence that we assess the content area competencies. We are doing this through aligning the tools and rubrics to a developmentally backed research framework, teacher professional development and instructional practices in the classroom. The result of this work is a self-direction toolkit, including the K-12 self-direction rubrics and the self-direction tools for grades six through eight, the tools have gone through a rigorous iterative design and validation process that includes student and teacher voice leading to instruments with both construct and face validity. This has been an effort to meld practice expertise with research expertise, to create valid and reliable performance assessment systems for these work study practices in this session, Wendy, Karin, and the content leads will share the design process, the rubrics and the tools with you. Jess, would you like to share the participant responses?

Jess Tremblay ([00:03:29](#)):

Sure. We were a little slow to start. Then once we got going, there were some pretty amazing ideas in there. So just to briefly summarize some of the things we heard people mentioning that self-direction means to them students being able to articulate a vision for the future that empowers them. I thought that was a pretty deep idea there and lots of ideas around choice students being able to choose their pathways, students being able to choose what resources they might utilize to reach standards. Having

students be demonstrating efficacy and their responsibility and some ideas around how we know students are being self-directed students can ask for help. Students can do things on their own. And I really love this idea of students might be able to know things or do things that even their teachers don't know. I thought that was a nice way to summarize the notion that they really are moving forward with their own vision and minds. So, at this point, we are going to turn things over to Dr. Karin Hess. Who is going to talk to us about the self-direction rubrics and how they came to be.

Dr. Karin Hess ([00:04:36](#)):

Thanks, Jess. So my involvement with the project really started years ago with New Hampshire's competency work. And we did a lot of work with academic competencies, but how do you measure self-direction? And just like everyone had good responses in the chat. A lot of teachers had a lot of good ideas about what self-direction looked like, but if you're going to measure it consistently, and that's what my role was to help think about how to measure it consistently, we had to have measurable and observable indicators. It had to be manageable. One of the things I saw in the early rubrics where there are so many things teachers had to look for, it really was not manageable. It has to articulate increasing rigor. So it doesn't look the same at all grade levels, but it should be a continuum and it should provide some instructional guidance because we can't expect kids to just know how to do this.

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So that was our starting point. In rethinking what it means to be self-directed we went to the research and some of the indicators of self-direction that we saw in the grounding research was self-awareness. How am I thinking about myself as a learner? How aware am I that I'm making progress? Because we know that is hugely important as a motivator for students to actually see progress. Initiative and ownership are how do students bring their own personalization, personal perspective to the learning? They are not just doing an assignment given to them. They are moving towards saying, here is a way I could show what I know. Goal setting and planning is another indicator of self-direction and that is the ability of a student to take a complex task, break it down and plan how to tackle it.

([00:06:42](#)):

Now we might give kids a tool like an action planning tool, but that in isolation, is not going to mean a student is self-directed. This is all rolled in together again, with engaging and managing, as they work through the learning, are they managing their time? Are they locating appropriate resources? And last of all, can they monitor and adapt? They know when something isn't working and can they change directions. And we've used this metaphor of the rope. If you are familiar with Scarborough's reading rope metaphor, it's that these are all separate skills that have to work together and become stronger as they are woven together over time. And so that was our starting point to build the rubrics and build the measurement tools.

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In the Essential Skills and Dispositions Framework, which is where, what our starting point was the description of the skills is a developmental approach, not a deficit perspective. So we don't look at beginners as being bad learners because they have something missing. They are children, students who are new to the task. They could be adults new to a task and mostly they follow a model that is given to them. When they moved to being an advanced beginner, they know familiar steps and they know how to do familiar things. We would call this near transfer. They can do things the way we have taught them in our rubrics. That first level of beginner is called the emerging level and the advanced beginner is now

you are developing some of those skills. The strategic learner in the Essential Skills Framework is a student who can analyze a situation, make a plan, determine what is going to work. Then they are applying and you'll see this little thumbs up at that level in the rubrics. We don't call it proficient. It just means now you're able to move beyond the near transfer. Now you can apply it in different situations and figure out how to make it work. And at the highest level, the emerging expert can analyze unfamiliar situations. And you will see expanding as the description for that level in the room,

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The piece of research that we went to as we built the rubrics came from some of my work on what makes a high quality rubric? And one is the adjacent levels are qualitatively different. It's not just, you do three more things or one more thing. It's that the quality changes over time. As you move through the performance levels, all of the descriptions in the rubric are kid-friendly because we want them to self-assess. We want them to take responsibility for their own work, and we want to avoid negative behavior. We fall into this pit sometimes of the lowest level says all the things you are not doing. You are not handing in work on time. That is just really talking about compliance or not being compliant, which is kind of the opposite of self-direction. We try to make sure that at every level, all the descriptions are stated in the positive. This is what is happening when you are just emerging. This is what is happening when you begin to develop those skills. This is what's happening. When you're applying, it's not what isn't happening. It's what is happening.

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We built the rubrics. We had to have some strategies to pilot with students. I'm going to just describe the rubrics a little bit, and then I'll pass it to Nicole and Tony, but all of the criteria are the same at all grade levels. That means we're looking at self-awareness. How am I learning about myself as a learner? We're looking at ownership and goal setting, but the other caveat is the rubric is not one K-12 rubric. The performance descriptors at each grade span are slightly different. So self-awareness looks different in a K2 student than it looks in a grade 9 and a grade 12 student. And one of the things that earlier rubrics was causing teachers to have to say to students is, sorry, you can't be self-directed until you get to middle school.

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We changed that perspective. You can be self-aware, you can set goals and make plans no matter what your grade span is. The descriptors are different and age appropriate, but the criteria remained the same at all grade levels. And we are just going to quickly show you the grades six through eight rubrics.

Now, one other note, collaboration in the research collaboration isn't component of self-direction. So this means that students don't become self-directed learners on their own. They learn how to advocate for themselves, to ask for input to seek out a mentor. And you will see collaboration skills built into the rubrics as well. Now we'll take a look at grades six through eight, so it's kind of a, kid-friendly looking rubric. They're all stated in the positive. You see the emerging levels and if you were to kind of skim that very quickly, you would see in the emerging level, in that second column I can choose a learning opportunity from options provided by others.

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So that's the very beginning of collaboration. I'm willing to listen to ideas from and if you move down that column, you would see that they are seeking support. They are setting their learning goals that match their personal interests. So here and there, you will see aspects of collaborative skills. And then in

the 9 through 12, you'll notice that these descriptors are not identical, but they also have some aspects of collaboration skills embedded in them. We're currently working on a collaboration rubric, but we wanted to recognize that collaboration is an important component of building these skills. I'm going to pass things to Nicole and Tony. They're going to talk a little bit about how they introduce the rubrics to students, how they got feedback on rubric, the rubric wording from students. And so Nicole and Tony I'll pass it to you.

Tony Doucet ([00:13:39](#)):

Great. Hi everyone. My name is Tony Doucette. I'm a ninth grade teacher at Souhegan High School. And one of the things that Nicole, and I'll let Nicole introduce herself in a second, went through. And one of the big things that we did was we used the Think Aloud Protocol. So you can see the focus group questions up there. I'm not going to read them all out to you cause you can, you can see them. But one of the things we did was we put together, I put together a group of students that was intentionally not loading the dice. It would've been really easy to grab a group of my highest achievers and put them together and have them say like, Oh, this will be super easy and, and great. And I love it. So what we intentionally did was we chose a mix of students who are all levels of self-direction skill.

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And we had them look at the rubric and we met on a Zoom meeting. We hopped on, we gathered feedback and we use these questions to try to elicit that information from them. Some of their responses you'll be able to see on this next slide. One of the first things was they really enjoyed the layout of the applying section and the applying section was where we started looking at because we figured that was one of the more important points to start with. And the feedback was they really understood the layout. Like it made sense to them, which is very important, right? If the students can't make sense of it, then it doesn't really work. They also thought that the rubric was great for helping with reflection for helping them think about what their goals were and how they met them and be able to take their past actions of experiences and apply them to this new learning.

([00:15:34](#)):

One of the things that Karin mentioned is the positive language and the students picked up on that right away. They liked how it shows, what you did do, as opposed to saying you did a really bad job with this, or this is what you're missing. No matter what, the level it talked about, something that the students were able to do. And then it also shows you what you could have done, right? What you should've done instead. But it doesn't, it doesn't make them feel bad about what they did. That lack of negative language was very beneficial to them. And then lastly, they thought each level made sense in terms of increasing expectations. Sometimes you'll have rubrics where things don't connect clearly and they were able to see each of these connections progress through the different levels. Now I'll throw it over to Nicole.

Nicole Woulfe ([00:16:28](#)):

Hi guys. My name is Nicole Woulfe. I teach eighth grade right now. I'm at Sanborn Regional Middle School, but last year I was a sixth-grade social studies teacher. And I want to apologize in advance. It's currently dismissal at my school. We have an early release today. So I apologize if you hear any additional sounds. My sixth graders saw a lot of versions of the self-direction rubric. On March 10th, I presented our newest version and my students like Tony's found that the design of the rubric was easier to use. They started mentioning right away how there were fewer words compared to our first or

second draft of the rubric. And they really appreciated that flow. They also thought it was more kid friendly for my students. It was easier for them to understand the different levels within the rubric. I had projected the rubric on my whiteboard. I was going through the different levels of the rubric and modeling. This is what this could mean. Here's what this level could mean. And my students started interrupting me with their own examples. Normally I don't appreciate being interrupted, but I was really grateful because it showed me that they understood what the rubric was presenting tragically. We presented this rubric on March 12th and we shifted to remote learning on March 13th so for my students it was just an overview. We didn't have the opportunity to use that. But I was really excited with their feedback at the start.

Wendy Surr ([00:18:05](#)):

Hi, I am Wendy Surr. I'm a senior research consultant on this team. And one of my roles was to help the team as they developed the rubrics and processes to make sure everything was reliable and valid. As you just heard from Nicole and Tony, part of the validity testing was working to make sure that the rubrics could be understood by students. This program has been going on for a couple of years and in the first go round folks worked on tasks that kids could do to demonstrate their self-direction. And one of the big aha moments after the first year in the first round was that looking at a task alone was not providing the kind of evidence that teachers needed to be able to score students self-direction. In particular, there was this realization that self-direction is something that becomes evident along the way.

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And so members of the team got together to develop some tools that we're calling evidence collection tools that could help generate the kind of evidence that you might need to see if students are self-directed. We then started to do an iterative process where we did a crosswalk with the rubrics that Dr. Hess was presenting. So what you see here on the screen is some of the cross-walking that we did. For instance, one of the tools that you're going to see in a moment that our team put together asks kids to work on an action plan. And we were able to show that the steps are involved in action planning, help to provide some of the evidence for goal setting and planning, which is one of the five areas of self-direction you are seeing on the screen. Also that we don't see self-awareness for this particular part of the toolkit. And we have two members of the team that I'd like to introduce Beth Gouzoules and Cathy Baylus, who worked on our first tool, which is tool one, which is about students, self-assessing their self-direction. And this is one of those key areas that can help generate the evidence for self-awareness as part of self-direction. So I'd like to hand it over to Beth and Cathy.

Cathy Baylus ([00:20:08](#)):

Hi, my name is Cathy Baylus. I'm a seventh grade social studies teacher at Laconia Middle School. And the first tool we're going to introduce is actually a pre-assessment of self-direction and this tool is intended to be a means for teachers to assess a student's ability for self-directed learning, and also for students to assess themselves to see where they are in their ability to proceed with self-directed learning. Throughout this presentation of this tool I'm asking for you to take a look, see how this tool might be beneficial for your classroom and any questions or thoughts you have in the chat, and then we'll address those at the end. The first question, why self-assess? We know that students do not magically materialize with inability to be completely self-directed and own their learning.

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It's not already embedded in their learning process. Self-direction skills develop over time, and this tool is used to assess specific skills. Some students may be very strong at self-awareness. They may be very open to asking questions. Some may be very goal oriented, but not all students can see that in themselves. So this is intended to build some self-awareness with the student and also gauge growth from year to year for the teachers. This tool is particularly beneficial if you are using a portfolio that travels with students from year to year it can be across content areas. It doesn't have to be specific to one content area. But collecting and documenting using this tool will show a student's growth in these particular areas over time. This tool is also about the process like I believe Tony mentioned, you need to introduce, and re-introduce the rubric.

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We want to make sure that students understand the language of the rubric and therefore will understand the language of the tool. So it would be introduced and reintroduced over time. And of course, as time goes on, you won't have to be quite as in depth with using that language over and over in the classroom, because they will begin to understand that on their own. This tool also has teacher instructions, but has built in modifications for teachers to personalize their instruction. We all have different students with different needs, different ability levels, and the tools are not finite for just this classroom, this student, this is how you use it. This can be modified to work for any teacher at any level in any content area. It was created based on student and teacher feedback that was given with the original iterations of the tools.

Speaker 7 (00:23:48):

As we created the tool, we got feedback from teachers. We got feedback from students and kind of modified it based on those ideas. And of course, you know, we use the research and development from the Essential Skills and Dispositions to support what we were creating when we created that next slide, please. This is considered a tool for success. You want to use specific goals that you're reaching for here. You want to identify, assess, and reflect. You're having students identify specifically what their skills are and you're doing this in a positive way. That's aligned with the rubric, you know, I can, what can I do? What do I feel my strengths are? What do I feel? You know, my challenges might be, or my motivations. You are having them identify what they feel their ability is.

Speaker 7 (00:24:56):

And then you're having them assess their level of those abilities, again, based on the rubric using the same language on the rubric. Am I emerging? Am I developing, am I applying at my extending? And you're going to travel these tools over time. So where a student may have felt they were emerging in their ability to communicate last year, this year, they may be saying, no, no, I'm already applying that. And that gives the teacher insight into where they were, where they feel they are and how far they've come over time. And then you're asking students not just to say, I'm applying because we know especially middle schools, middle school students are going to say, yep, I can do that. We want you to put some evidence in there. Tell me why you feel that way. What evidence do you have that can support why you believe this? And that, again, traveling over time will be invaluable for teachers as they receive students in different content areas or grade levels. Beth had the opportunity to implement this in the classroom. So I'm going to turn it over to Beth to talk about how this works in her classroom.

Beth Gouzoules (00:26:16):

Hi, I'm Beth Gouzoules and I teach at Rochester Middle School eighth grade social studies. And I had the opportunity to work with this last year in the spring. I piloted it with a group of students. And then with the new changes that we have made to this, I was able to pilot it again this fall with my kids. A lot of my kids **loved there** were some challenges for some of my kids, but my district has just started with self-direction. So this is a new mindset for a lot of my kids. Many of the kids felt because we were in school, we have a socially distance classroom, that this natural learning environment really led to some great interactions between the teachers and the students and that, because we were in the building, I'm able to give them their explanations that they need, but also they were able to ask questions if they had a difficulty with the section, some kids struggled in the sense that they weren't able to be reflective because this was a new mindset for them and to really see themselves and be self-aware was a struggle for some kids, but we definitely worked through it. We saw that their peer support, that they were able to work with, even though it was a socially distanced peer support that they still are able to get that support from one another. And also I can use this over time. So I'm going to go back to this tool, not just once, perhaps two or three times, so that way they can see the growth over the year that they have made on recognizing their self-direction and being able to talk about it. I really felt that this tool created a nice bridge between the rubric and the kids and that way they could actually see the rubric in action and were really able to identify some of the places that they were emerging or developing or even applying.

Cathy Baylus ([00:28:29](#)):

So Beth had used it in class much like Nicole. I did not have the opportunity when it was planned to use it in class last year, because it was planned for the first week in April and we went to remote learning and I wasn't prepared for a remote learning opportunity with the tool at that time. This year at Laconia Middle school, we are currently a hybrid school. I have sets of students every other day. We have our A group and our B group who are in class one day at home the next. I thought that might be a good opportunity to use this tool. Remotely, if not semi remotely, by introducing the rubric to the students for the first time while they were in class. I introduced it to them live in the classroom. They had never seen it before.

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So it was, something that they needed to talk to me about and ask questions about. And then for their remote assignment the next day I attached it in Google Classroom and I made sure they understood this isn't any kind of graded assessment because seventh graders immediately go, wait, is this going to be graded? Is this a grade? And I explained to them that this is something I'd like you to use what we talked about yesterday to assess yourself today. And the responses were interesting when they were back in class. Again, the next day I was able to get verbal feedback and responses from them about what they had experienced to doing this remotely. The version I used was not a writeable PDF. I used the version in my Google classroom that I made writeable for them, but the website will have a writeable PDF on it when it's fully available.

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And the kids really liked that idea. They liked that they could just type in the answers. They could just write what they wanted to write right on their computer. And it was saved for them. I had students comment that they liked that they had unlimited time so that they could actually think about what they wanted to say. They felt like if they had been in the classroom, they would have felt rushed. There were students who reached out to me with questions while they were completing this. And it was really nice for me and for them to have that one-to-one communication with them. I also felt, and there was a

student who did comment on this, that it was more personalized. They could be more honest, they weren't in the classroom and feeling like someone might see this, or someone might hear me, or someone might be looking at my paper and they were much more honest about what they were saying, what they felt their strengths were, what they felt they needed to work on or what their challenges were.

[\(00:31:29\)](#):

Remotely, like a lot of the experiences I've had with remote learning in general, there was a lack of completion, particularly among my most at-risk students. That's something that has been a challenge with, particularly at-risk students across the board with remote learning. So that's definitely something to look at. And I would love feedback on that from teachers who've been in the similar situations. There was for some students, an inability to ask questions, some of them were doing it at nine o'clock at night when I was no longer online to ask questions. Some may have just had a lack of a willingness to ask questions. And then when they came the next day, they said, well, I didn't fill in this part because I didn't get it. And then there was a little bit of a feeling among some students being overwhelmed by the tool itself.

[\(00:32:34\)](#):

I feel like that could have been attributed to the fact that they had never introduced to the rubric before. I think, again, that's something that over time, as they become more comfortable will become easier for them to access. And some of them did feel that they wished they had been in a classroom where they could have heard what other people had to say, just that comfort of being in a room with other kids. You've always got students who don't want to ask a question that they have, and they're so grateful when somebody else asks it for them because they wanted that information. There were students who commented that they would have liked to have heard what other kids had to say too. I do feel it could definitely be a successful remote learning tool. I think there's going to be challenges no matter which way you look at it with remote learning as remote learning is right now and especially with hybrid, some of the kids just wanted to get back to the classroom to talk about it, but I did feel it was successful in that they took it, they completed it, and they felt like they had done something for themselves. Next slide.

Jess Tremblay [\(00:33:51\)](#):

Jess is going to give us a summary of what's in the chat. Not a lot of discussion on this particular question, although we may want to open a little space for anything you've heard up to this point, but let me just summarize what has been said about the question of how it might be beneficial in your classroom. So Ashley started us off by noting that it can help to build trust among students, particularly because they're the ones that hold the right answer in this case. It's about them. Dr. Hess reminded us that self-reflection really is our most powerful assessment for assessing learning and that's what this tool is all about. And that shift from assessment of learning, which is very teacher driven to assessment for learning, which is student driven really as highlighted by this tool and this process. This also could be noted as Maria mentioned, as a bridge or a connection for student learning pathways.

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This could be a jumping off point for establishing what might be an appropriate pathway for students. And then there was also an idea posted around if you were in a district that had a really large English language learning population. I believe it was Jason who mentioned in his district 40% of students fall

into this category. Might the rubric need to be even further simplified for language to be more accessible to all learners which really also brings up another point around the varying districts that we all teach in in regard to the socioeconomic status. And that in some districts, students might have been spending a lot of time really based in a compliance place and that this process and these tools are really helping students to move away from just complying, but really thinking for themselves about their learning. I know a couple more things have, have popped up in the time that I've been sharing and I didn't get a chance to see what those were. Previously there were also a lot of questions about where to find this information and it will be available both through the website that we'll give you a link to [Best-future.org](https://www.bestfuture.org) and then Aurora will also be posting a recording of the session and of our slides. I don't know if anyone sees anything else that's popped up or that I didn't mention before we move on to the next section.

Wendy Surr ([00:36:09](#)):

I'm seeing that Jason's asking about the instructional supports and I think that's a good segue to Tool Two, which helps us to scaffold some of that learning. In, in addition, Jason, over time, we're hoping to build into our toolkit, just examples of how teachers have supported the learning the self-direction skills and competencies.

Jess ([00:36:35](#)):

I agree, Wendy, thank you. So I guess we'll jump in here. I'm looking at Tool Two or what we're now calling our My Self-direction Roadmap. This is something that you're going to hear from me. name is Jessica Tremblay and I teach social studies at Souhegan High School in Amherst, New Hampshire. And I'm joined today by my colleagues, Nicole and Donna, who will introduce themselves as we get going through here first, Nicole.

Nicole ([00:37:08](#)):

Yeah, I am excited to join you again. Now that dismissal has ended, and it's a little quieter here at the middle school and provide you with an overview of the roadmap. And I love that people were asking about instruction. Instruction is one of my favorite things. And I think the most critical when it comes to self-direction, we want to make sure students have the tools to be successful. And this roadmap that we've been able to design and redesign and redesign again has helped students grow as self-directed learners. And I'm going to show you a little bit about those steps. So step one is where students are coming up with their action plan. They're understanding the task. We can give this with any discipline. We've been using it with social studies tasks, but this works in any classroom or in any setting. Students determined those learning goals using that tool, one of the pre-assessment and then make an action plan, how they're going to tackle a task. Step two is that self-direction goal and action plan review, and teaching students how to write goals and meet goals is a critical part of this roadmap. I found in just interviewing my students the last couple of weeks, as we transitioned from remote learning to in-person learning that goal setting helps them stay focused. And that's such a critical part of our roadmap. It also includes a mid-task checkpoint for Step three. And this is the hardest part for learners as we'll talk about

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For them to really take that pause and reflect on how their action plan is going, get input from others, teachers or peers, and then make changes if needed. And then that post task reflection. This roadmap, I know sounds lengthy, but there is a method to our madness. We also have some questions, so just like Tool One - we want you guys to think about these questions as we present in delve a little bit deeper

into the tool to hop in that chat at any point. And then we will summarize and reflect on those questions at the end. The first question is which part of the roadmap resonates with your current practice and now the second question is which part of the roadmap are you most likely to add to your practice and why?

Jess ([00:39:31](#)):

We want to take you back to step one of this Tool Two, and there's a lot to navigate here. We want to pause and explain that the real difference between this second tool and the first one that you heard Kathy and Beth talk about is that this is really a task specific tool. So this is a place where students can anchor their thinking or their ability to be metacognitive about their learning in a very specific task that you have provided for them in the classroom. In this first step of the roadmap as mentioned previously, they're creating an action plan. And what's interesting about the name of this particular tool, we call it a roadmap, because now there's a little bit of a more tangible destination, this project or this task that you want students to complete and asking them to take the time to stop and think about how they're going to get there.

Jess ([00:40:28](#)):

They're creating their own map for getting to that destination. And because it's task specific, it helps to push students, be very metacognitive, and in a very concrete venue. And if you look at the chart, that's on the slide here, it's also fairly concrete. So it's not just, what step do you need to take, but also what strategy will you use to achieve that step? So this is a tool that I've used actually over the past three years with students and each time we use it we are able to tweak it based on their input and each time we're hoping to deepen our evidence collection around eliciting self-direction. The most recent time I used this tool was actually the last thing I did in person last spring with students in March. So I haven't had a chance to use it yet in a remote setting so I'm going to ask Tony to speak for a moment about what that might look like with remote learning.

Tony ([00:41:20](#)):

At Souhegan High School, we are currently in a hybrid model, so I have got students who are remote and in person at the same time. And we just started using this roadmap a couple of weeks ago as we began one of our final performance assessments in my social studies class. And one of the pieces of feedback that we heard from remote students was that it really was helpful for them to monitor their own learning. They liked the ability to have, and they didn't use this word, but we would say like there was increased agency in terms of how they were able to structure the format. They were able to have their due dates so they can set up their own checklists. And they really did appreciate having that **at D them** something that they had concrete in front of them to work on, because we do have those students who it seems like they are on, they've got their cameras off and they're hard to find and they can try to fade into the background and this, and going over this roadmap with them after they've sort of built it themselves really was useful for helping them stay on track and through the check-in process.

And we are actually just about to enter into the mid task checkpoint piece. We did that a little bit on Monday and we're continuing that tomorrow and Friday.

Nicole ([00:42:58](#)):

Using Tool Two with various grade levels means that there's going to be instructional scaffolds. For me, teaching sixth graders, it's going to look different than Donna and Jess teaching high school students in sixth grade, there was a lot of modeling, or as I tell my students, we are super modeling. And as we go through the different steps, I recorded a lot of videos and provided examples. Students had a better idea

of how to fill out portions of the tool. The hardest part for my sixth graders was applying. So they were really good at listing challenges they were having, but they had a harder time figuring out how to overcome those challenges. That's when we used a lot of peer advice, we checked it in small groups. We had people just ask the audience almost like it was a talk show at some point, like I'm having this problem, what should I do? And that was a really great way for students to build those collaborative skills and to get ideas from their peers on how to be better successful.

Donna Harvey-Mosley ([00:43:59](#)):

Hi, I'm Donna Harvey. I teach at Sanborn Regional High School and you'll have to bear with me because some of Nicole's dismissal noise just walked in my front door a little while ago. So it might be a little unpredictable here. I used this tool actually just before remote learning started as well with some of my juniors and seniors in the psychology class. And the results that I got are probably a little bit different than if I had used in another place. I used it with my honors level psychology students who want to be very independent, who want to be able to work at their own pace on their own with very little modeling or scaffolding. If I were using it with my sophomores I would obviously have to do a lot more.

([00:45:00](#)):

One of the larger challenges for this group of high functioning, highly motivated students is that they're very product driven. What do I have to do? Let me get it done. They didn't necessarily want to enjoy the process, experience the process. They just wanted to get it done. So sometimes they felt like they had to go backwards because they pushed forward and then had to go back to the form to fill things out. But that's an important lesson I think for all of us to learn is that the process matters to not just the product. When the tool was originally designed, we had the opportunity to get feedback from a couple of different groups. We got feedback from students. Jess had some of her students do some work because she had used it for a number of years, but we also had our work group PACE for social studies use some of these tools and evaluate the effectiveness of evidence gathering.

([00:46:22](#)):

For the students, the original versions felt sort of redundant because some of the post task reflection comments were the same on what was Tool One and Tool Three, which have now merged into this roadmap. That was a direct result of student information and opinion. And then the naming of this tool and how to encompass everything that was included. It started out being just called the action plan, but really evolved into so much more. And I think we finally hit the mark with the roadmap as Jess eloquently explained earlier. It really is about getting to the destination and the steps along the way. And that's, what's in this tool now. So that was student feedback. Also, there was too much scaffolding or not enough scaffolding depending on the grade level. So we tried to address that in this tool and really talk about the importance of flexibility there for teachers to determine what their students needed in terms of what you had to do versus what you could do and then did teacher feedback. It was interesting because we compared the tool and the evidence we got from the tool and the rubric. And we realized that our original tool did a really good job meeting certain dimensions and not others. So that's another reason why it underwent some pretty significant revisions.

Nicole Woulfe ([00:48:22](#)):

In thinking about this tool and how it might be different from other tools that are similar I know we have a lot of questions coming through with the chat. I'm impressed at how chatty you guys are in there. And I love it. We did include students in our work. In addition for teachers keeping really an eye on that

rubric and on the prize, if you will, we want our kids to be part of this team. And as students gave us feedback we were able to make stronger learning goals. We were able to make a chart for checkpoints that were helpful for students. We were able to iron out some redundancies as Donna noted in that post reflection. When we really thought with working with students and collaborating with ourselves and our experts like Dr. Karin Hess and Wendy we were able to streamline the tool to meet the needs of learners with different scaffolding needs. Jess, do you want to talk a little bit about the connection to the rubric?

Jess Tremblay ([00:49:21](#)):

Yes. I think I was well positioned to describe this from both what you heard earlier from Dr. Hess and from Wendy's work with the crosswalk. While we knew that earlier versions of this tool had demonstrated positive results when we calibrated the student work across our team one of the things that we noticed it was posing a challenge for scoring was collaboration. And as we heard from Karin earlier, while you might not think of collaboration of self-direction, they might seem inherently different. In fact, they are explicitly connected or perhaps more implicitly connected. So we wanted to provide opportunities for students to be able to engage with one another in order to develop their self-direction skill. And that's what you see in this step three of this particular tool, or this roadmap where we ask students or invite students to engage in a peer review protocol.

([00:50:12](#)):

And it can happen in two different places in the roadmap. Step three and step two, both have that opportunity, but asking students to explicitly pause and share their observations with one another so that you have yet more evidence to gather around that element of self-direction. I think this visual on this slide shows you that through that protocol, we actually do hit all five dimensions of the rubric for self-direction. And while we'll continue to pilot these tools, I think part of what I see emerging a little bit in the chat, and we'll hear more about that maybe in a moment from Nicole and Donna, who've been looking at it closely is the idea that some, some additional information around how we instruct on this might be helpful for different teachers to think about how it will be used within your own schools and your own districts, recognizing that we all know our students best and what works for me in Southern New Hampshire might not work for someone in another place, somewhere else in the country.

([00:51:15](#)):

But if all of this work is anchored in that Essential Skill and Disposition Framework which was our starting point, I think it does help to bring some, I don't like to use the word uniformity, cause that makes it sound cookie cutter-ish, but rather some, some consistency of across the country around what it means to develop such an important skill around being metacognitive and asking students to really own their own learning, because that's really what's at the heart of this process. And maybe in part, what we think makes this different from other types of goal-setting is being anchored in that Essential Skills and Dispositions Framework. So maybe to take a more specific look at how we're doing, addressing those questions, Nicole or Donna, how's the chat looking and what do we need to make sure we answer?

Nicole ([00:52:03](#)):

The chat is very active. It's sometimes a little different than my remote learning chat. I love having adults in here. We're having a lot of comments about how people are using roadmap like tools and sort of ironing out what is different from the tool that we're presenting to tools that they've used in their own classroom. I think people are still pondering maybe which part of the roadmap resonates with their

current practice. I think people are still thinking about those questions. But I did notice a lot of discussion on metacognition in general and how we can make sure to include that in our classroom instruction. Donna, what were you seeing?

Donna ([00:52:42](#)):

I see a lot of back and forth actually. I think that Karin and Wendy are doing a really good job of answering people's questions as they come up and simplifying our job significantly. But I do think instruction is something that has come up several times in the chat and also yeah, metacognition versus emotional self-regulation I think was there as well.

Dr. Hess ([00:53:26](#)):

The idea of a developmental progression doesn't mean it happens magically when kids get taller, it means that we intentionally teach the skill. So when a lot of people are asking about instructional strategies here's the thing to think about with metacognition. We only know if kids are being metacognitive if we ask them to reflect on what they've done, because you can't just watch a student and know what they're thinking until you ask them. Well, why didn't you make that decision so conferencing throughout the time, but three strategies I've put in there. A think aloud might be stopped and talk about what decision did you just make and why did you make it? So it's making it observable and measurable for all kids connecting this back to the research on social, emotional learning. Self-Awareness as a learner is part of that social and emotional development.

Dr. Hess ([00:54:27](#)):

Self-Management how do you manage yourself individually and work with others? So there's a lot of overlap with the social, emotional learning research and the self-direction research, the other thing that I would suggest, and it's very powerful to show students, give them a framework for how to put together a reflection. So the tools are kind of getting kids prepared to do that, but showing them other reflections that other students have written - oh, that's how I might explain this or show this. So just like we have exemplar pieces of writing or exemplar pieces of mathematics, problem solving kids need to understand, well, what are the components I need to address in a good self-reflection piece, because that's what gets at the metacognitive piece. So maybe those things will be helpful. I also suggested in the chat that you could take these rubrics and build a performance scale with them, and I will be talking more about how to do that in a November 10th Aurora Institute. I don't want to take up time here, but it's kind of a logical, it makes sense. You have kids work at a level before they go to the next level. So they're not just jumping in at any level. And for some kids they need to feel that developmental progression.

Dona ([00:56:00](#)):

Oh, no, it was the perfectly, it was perfectly timed. Actually I just wanted to open up the discussion to anyone who has any additional questions. I think we're moving on to that portion of the event. So if you want to type it in the chat or unmute yourself and ask, we'd be happy to answer in the next few minutes.

([00:56:35](#)):

Some of the questions might be what other resources are there. So as mentioned earlier, this will be available through the Aurora Institute and those are links. You can click on to see each of those documents

(00:56:56):

And we're hoping the finalized toolkit will be available in a couple of weeks.

Tool kit will be on the [BEST website](#).

Karen, somebody is asking about how they can access your November 10th session.

Dr. Hess (00:57:49):

I saw that it's an Aurora Institute post-Institute session. I will post the link on my website and you can register just like you did for this one that said more in depth. It's a two-hour and we will go into more depth on how to develop a performance scale, how to develop performance tasks, how to build a body of evidence, some of those pieces that this fits right into. So how do you build a performance task where you build in the self-direction skills as part of the whole process?

(00:58:32):

Oh, thank you. Thank you. Somebody just posted the post sessions. Oh great. And I just wanted to know a couple other things that you might see in the chat. There's a survey for this session. There is also the link that Kathy posted for that our best website. It's a lot, lots of good resources heading into the chat. So you need to click on any of those before you exit. Please make sure you do that. So I went to that link. It's actually the name of the webinar on November 10th is Deeper Competency-Based learning, Making Equitable Student-Centered Sustainable Shifts. We will address performance scales in that, but there's also another

(00:59:22):

One on November 5th. The Bob Marzano is doing, he approaches it a little bit differently, but it's the same idea. So they're going to, they call them proficiency scales. We call them performance because it's not about scoring. Most of them are there. So there's two good resources.

Kathy (00:59:42):

Okay. Thank you, Karen. And thank you to all our presenters and to all the participants.