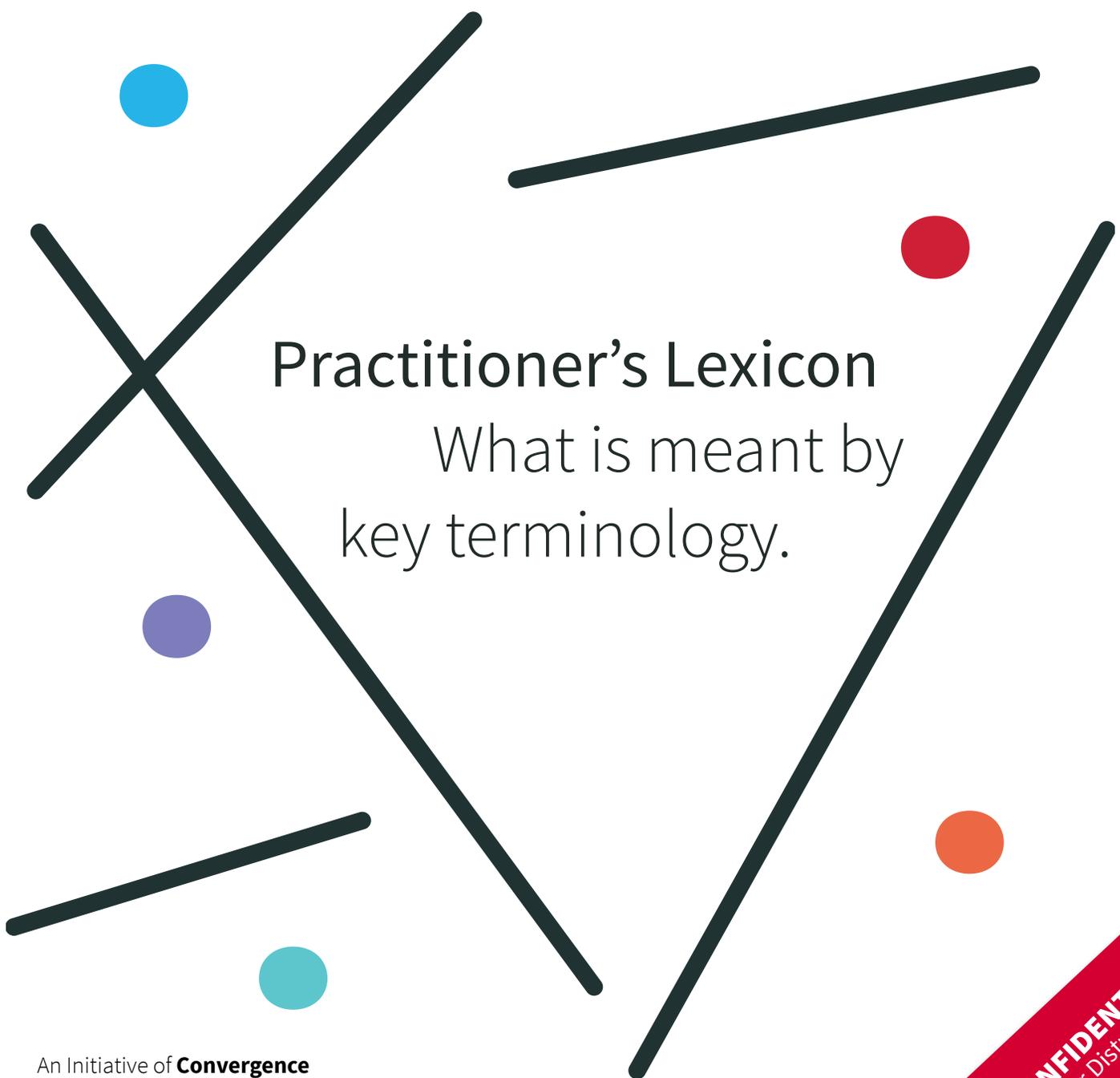


Learners at the center.

The background features several thick, dark grey lines and colored circles. A large 'X' shape is formed by two intersecting lines. Other lines are scattered across the page, some parallel to the 'X' lines. There are five colored circles: a blue one in the upper left, a purple one in the lower left, a teal one at the bottom center, a red one in the upper right, and an orange one in the lower right.

Practitioner's Lexicon  
What is meant by  
key terminology.

An Initiative of **Convergence**

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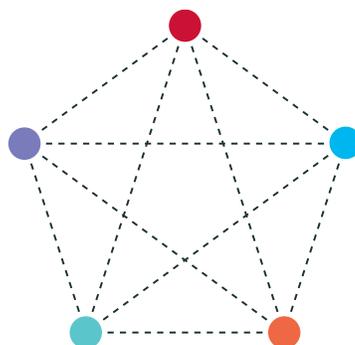
# Introduction

This document is a response to the near universal request from pioneering practitioners who seek to communicate and share learnings across learner-centered models and from various disciplines or perspectives. They have asked that key terms be distinguished at a level of depth that will enable a shared practitioner language.

As such, this is a technical document that clarifies key terms for pioneering practitioners. This document may also be useful for those engaged in conversation with those pioneering practitioners (such as funders, policy makers, and tool makers).

In the vision for a re-imagined education, five key elements are outlined:

- Competency-based**
- Personalized, Relevant, and Contextualized**
- Learner Agency**
- Open-walled**
- Socially Embedded**



The intention of this document is to make clear what is meant by each term. While each term is distinguished separately, it should be understood that to be part of a learning model, an element must empower the other elements and not simply be done on the side of the rest of the model, or what is often referred to as being “bolted on”.

While the elements are carefully distinguished, what follows are not rigid blueprints or how-to specifications. Rather, what follows are precise discussions of what is meant by a term so that when a term is used, it can be used consistently.

# Distinguishing “Competency-based”

By the term “Competency-based” we are referring to a central characteristic of a learning model where the learning has been organized around building a learner’s capacity to do things proficiently, rather than around the learner simply knowing the prescribed content.

Let’s begin our discussion of Competency-based learning by distinguishing what we mean by the term “competency.” In this context, a “competency” is the ability to perform a specified task with proficiency. In other words, a competency is the ability to do something effectively and reliably in a variety of circumstances, it is not the mere retention of a given set of facts and theories.

Each competency is constituted by the specific combination of knowledge, skills, and/or dispositions that are needed to be able to perform the specified task. We define “knowledge”, “skills”, and “dispositions” as follows:

- **Knowledge:** The theoretical or practical understanding of something, including what is often referred to as content knowledge;
- **Skills:** The capacities needed to apply knowledge effectively in producing specific results, including the skill to acquire additional knowledge regarding the matter at hand;
- **Dispositions:** The behaviors and ways of being needed for a person to apply knowledge effectively in the circumstances of life, both current and future.

For example, if a learner is to be proficient in the competency Basic Research, a few of their enabling knowledge, skills and dispositions may be: knowledge of validity assessment and footnote formats; skills in the area of internet-based searching and keyword searching; and dispositions such as patience, curiosity, and integrity.

By the term “Competency-Based”, we mean that a learning model has two fundamental characteristics:

1. Competencies are the fundamental unit of learning in the curriculum; and
2. Each learner is advanced to the next learning challenge when they can demonstrate proficiency in a competency.

## Competencies are the fundamental unit of learning in the curriculum

A curriculum is broadly defined as the totality of learner experiences that occur in the educational process for the purpose of achieving identified educational outcomes. This is distinct from grade-level subject knowledge being the fundamental unit in the curriculum. When competencies form the fundamental unit of learning in a curriculum, the educational outcomes are expressed as competencies, and the pathways for achieving those outcomes are charted through pre-requisite competencies.

A Competency-based Learning curriculum is then comprised of a set of higher level competencies which represent the sum total of what the learner is expected to learn. These higher level competencies are broken down into lower and lower level competencies which are integrated to reach higher level competencies. Examples of higher level competencies might include Analytic Problem Solving or Persuasive Communications. Examples of lower level competencies might include Linear Problem Solving, Algebraic Modeling, Persuasive Writing, and Debating.

A learner’s competency development pathway is derived by mapping their current competency development needs against the currently available learning opportunities and then looking forward in time. Learning opportunities can include a broad range of learning formats depending on what is available as well as on the learner’s level of maturity: classroom-based learning, blended learning, online learning, self-

directed study, homeschooling, project-based learning, activity-based learning, internships, community-based learning, student exchanges, college courses, and even general life experiences.

Each learner moves on their own pathway through the competencies from lower levels to higher levels in such a way that they graduate having met or exceeded a set of pre-defined, high-level competency standards. These standards are established locally in light of State and National standards and requirements. As with any graduation standard, they are designed to ensure that each learner is prepared for life as an empowered individual, a constructive member of their community, a productive participant in the economy, and an engaged citizen.

### Each learner is advanced to the next learning challenge when they can demonstrate proficiency in a competency

Advancing learners at the point of proficiency rather than after some fixed period of study allows for the variable pacing of learning. This is distinct from advancing the learner based on age, grade, and seat time. As long as a learner can demonstrate their proficiency, they can progress to their next learning challenge. This is contrasted with learning models that advance learners based on meeting minimum knowledge requirements in a fixed amount of time.

If a learner is progressing too slowly to achieve their goals, additional support resources are provided. If a learner is progressing quickly, or is already proficient, then they are quickly advanced to the next challenge. For this to happen, assessment of a learner's proficiency must also play a role while competencies are still being developed. In addition to "Assessment Of Learning" against a third-party standard, there are two different kinds of assessments that are focused on in a competency-based model. "Assessment For Learning" which involves the provision of real-time diagnostic feedback that allows a learner to quickly learn from both successes and failures and to identify where they are getting stuck. And, "Assessment As Learning" which provides the learner with opportunities for self-reflection and self-discovery. In this kind of self-assessment, learners are building their self-knowledge, and learning about the kind of support which allows them to excel.

A learner's proficiency in a competency, their ability to do something effectively and reliably in a variety of circumstances, is ultimately assessed against an external standard for each competency. When a competency standard is met, the learner is often characterized as having "mastered" that competency.

Competency-Based Learning as an element of a learning model is sometimes referred to as "performance-based learning", or "proficiency-based learning". We have chosen the label "Competency-Based Learning" to place our emphasis on what is learned rather than on what is measured.

It should be noted that in various efforts to apply Competency-Based Learning, innovative practitioners have found an opportunity to add a number of other complementary elements to their models. For example, Competency-Based Learning makes it easier to make learning experiences meaningful. Competency-Based Learning also creates clear opportunities for learners to co-create their learning pathways with education professionals. It also supports learners as they take advantage of learning opportunities beyond the traditional walls and hours of a school and in a variety of social settings. In some efforts, the term "Competency-Based Learning" has been stretched to include some or all of these additional elements. In our conversation, we do not stretch the term's meaning. We use the term "Competency-Based Learning" to mean only and specifically learning models where: (1) competencies are the fundamental unit of learning in the curriculum; and (2) each learner is advanced when they can demonstrate proficiency in a competency.

# Distinguishing “Personalized, Relevant, and Contextualized”

By the terms “Personalized”, “Relevant”, and “Contextualized” we mean those learning experiences that are tailored to make the unique connections between the learning challenge at hand and each learner’s unique needs, interests, and circumstances. In this approach to learning, we leave behind the industrial-age ideas of an “average” or “standard” student, of “one-size fits all” curricula, and of process manageability achieved through standardization and exception handling. Personalized, Relevant, and Contextualized learning involves the creative integration of each individual’s aspirations, passions, and contexts with collectively agreed upon standards for learner outcomes. When learning experiences are made Personalized, Relevant, and Contextualized, the education system itself adapts to the particular learner rather than requiring the learner to adapt to the particular education system.

In various efforts to apply this way of thinking to current education environments, the terms “Personalized”, “Relevant”, and “Contextualized” have been used in many different ways. Quite often, one of these terms is used to characterize an entire learning model rather than a single element. This is a natural outcome of discovery during implementation. When introducing one new element, very often the need for other elements is revealed and terms that are already in use may be stretched to include the additional elements or ideas.

In this shared conversation, we are going to use the very specific meaning of each term without stretching them. This will enable effective communication across experiments, across disciplines, and across models.

So, in this conversation, what do we specifically mean by the terms: “Personalized”, “Relevant”, and “Contextualized”?

- **By Personalized**, we mean that the learning experience is made responsive to the learner’s individual needs and strengths. This includes taking into account, in terms of both resources and learning designs, the particular starting point that the learner is at; the pace at which the learner is engaging the learning challenge; the particular learning needs and gifts of the learner, as well as their particular life circumstances; and the unique learning styles of the learner. It also includes responding to the needs each learner has for: unstructured time, physical activity, creative and artistic expression, and playing with friends. When learning is Personalized, we have addressed the question: How can I best be supported in my learning and development as I participate in my learning community?
- **By Relevant**, we mean that a learning experience is applicable to the learner’s real-world challenges, interests, and/or aspirations. What is being learned then occurs for the learner as useful. The learner is clear how they will better be able to successfully handle the challenges of daily life, or better be able to enjoy an area of passion, or better be able to pursue a long-term aspiration. When learning experiences are Relevant, the learner is naturally pulled into them; there is less need for external motivation. Included in Relevant is the provision of entirely new experiences that offer the learner attractive opportunities to develop new interests. When learning is Relevant for the learner, there is always an answer to the question: Why am I learning this?
- **By Contextualized** we mean that the learning experience is effectively embedded within a context for each learner. Learning that might not initially occur as relevant or applicable for a learner is contextualized in a way that it gains relevancy for the learner during the learning experience itself. This requires being both responsive to the context from which the learner comes and being intentional about creating learning contexts in which the learner makes meaning out of what is being learned. Learners arrive into a learning experience with assets and sensitivities from their own cultural, social, economic, and family contexts. Learning experiences must be responsive to those contexts, avoiding

bias and the imposition of perspectives while also leveraging the richness found in the learner's background. As importantly, learning happens in a context. When learning is intentionally contextualized, it occurs for the learner as both meaningful and engaging. Some current approaches to contextualizing learning include project-based learning, service learning, study abroad, laboratory learning, internships, and the provision of creative and play-based learning opportunities. When learning is contextualized for a learner, there is an answer to the question: *Why does this matter to me?*

Each community pursuing this kind of learning model will find ways to personalize, make relevant, and contextualize the learning experience of each learner appropriately to the rest of their learning model, to the range of needs present in their learning community, and to the resources available. The result is that each learner has their unique needs and interests met while they learn in a variety contexts, both independently and with others.

Personalized, Relevant, and Contextualized learning experiences press the education system to respond directly and specifically to the learning needs, interests, and circumstances of each learner, assisting them when they encounter difficulty and propelling them forward in areas where they thrive.

# Distinguishing “Learner Agency”

What do we mean when we say “Learner Agency”? Let’s start with the term “agency”. In his book, *Cultural Studies: Theory and Practice*, Chris Barker defines “agency” this way: “... agency is the capacity of individuals to act independently and to make their own free choices.” To act independently in this sense, a person must have free choice available in areas that really matter to that person and they must also have the wherewithal to exercise that choice effectively. When these conditions are met, the person may be said to have “agency” in the matter at hand.

What does it mean for a learner to have agency? Learner Agency involves the availability of meaningful choice and the learner’s wherewithal for exercising that choice, such that they develop into responsible owners of their own learning.

Of course, every learning environment can be said to include some degree of choice in that learners are always making choices—sometimes big choices and sometimes small choices. Even in the most restrictive learning settings, a learner has the option of accepting or resisting what has been assigned and the decision of how hard they will apply themselves to any particular task. However, we use the term Learner Agency to be more than the mere presence of choice. Rather we mean the methodological development of both the capacity and the freedom of learners to exercise choice regarding what is to be learned and to co-create how that learning is to take place.

In this vision, we use the term Learner Agency to refer to a key element of the learning model itself. In such models, learners gain more and more choice and control over their learning pathways and learning experiences while working with adult education professionals at each step. These professionals ensure that there is a methodological introduction of more and more learner agency as appropriate for each learner along with: the development of the wherewithal to both shape and make choices effectively; the cultivation of responsibility for the consequences of one’s choices and actions; and the development of the self-knowledge and insight needed to grasp the importance of owning one’s own learning process.

For a learner, Learner Agency can be manifested in a variety of domains: exercising choice and taking independent action related to learning topic or content and the manner in which that topic is addressed; exercising choice and taking independent action regarding the learning environment and the conditions present in those environments; and exercising choice and taking independent action regarding learning pace and learning feedback. The nature and range of options made available at each stage of development can vary. Learner Agency is expected to increase as the learner matures, recognizing that the evolution of Learner Agency is not necessarily linear or incremental. The intention is to have the learner experience being fully responsible and self-reliant in the matter of their own learning well before graduating.

When Learner Agency is present as an element in the learning model, it can be depended upon to enable other elements of the model and to contribute decisively to the development of each learner’s life skills and dispositions. We would expect to find the following observable learner outcomes in a learning model with a successful Learner Agency component:

1. Learners develop a sense of ownership regarding their own learning including a passion for learning, an ability to both create their learning experiences and assess the outcomes, and an interest in continually improving their learning experiences.

2. Learners develop the capacity to articulate their own learning needs and desires with insight into how they learn best and what they specifically need to support their own learning and development.
3. Learners develop adaptability, resourcefulness, and resilience as they handle increasing responsibility for their own learning, informed equally by successful and failed learning experiments.
4. Learners develop a growing self-assuredness and self-confidence with regard to their capacity to direct their own learning, create their own learning experiences, and to engage in unstructured learning challenges.
5. Learners experience themselves and their ideas as valued and as valuable; they develop an associated sense of self-worth.
6. Learners, having been supported in taking full ownership of their learning, leave organized education ready to be life-long learners.

In learning models that do not include a strong element of Learner Agency, the learner is challenged to figure out what others want from them rather than to distinguish their own learning needs. An emphasis on compliance with assigned learning leaves learners as passive receivers of education, dependent on others for their learning.

When increasing Learner Agency is emphasized in the model, learners develop the capacity to direct their own learning. As they seek to make better and better decisions for themselves, learners increasingly take responsibility for incorporating feedback and assessment in their learning. Additionally, they take increasing responsibility for the impact of their choices on others who share the same learning environment.

Learner Agency thrives when learners know themselves, discover their own gifts, and develop themselves as self-confident lifelong learners.

## Distinguishing “Open-walled”

What do we mean when we say that a learning experience is “Open-walled”? Taking the term literally, we mean that the experience is not walled in. The idea is that learning is not limited to a closed box called “the classroom” or “the school;” it can happen anywhere. And learning is not limited to a traditional “school day” or “school year;” it can happen anytime. Open-walled means that education is invited to take place outside the primary learning environment and, at the same time, the outside world is invited into the primary learning environment. In either direction, such learning is “Open-walled”. The walls are open.

What walls are we talking about? We are talking about the walls or boundaries around the primary learning environment. In most cases, the primary learning environment will be a central location where learners gather to organize their learning, meet with peers and adults in the system, and access specialized resources. Such a location could be referred to as a “home base” or an “education hub” or a “school”. It is also possible that the primary learning environment can be the learner’s home, a virtual location, or another gathering place in the community. Regardless of what kind of environment is selected as the primary learning environment, the learning can be made to be Open-walled.

Numerous approaches to learning outside the primary learning environment have been used effectively, these include: learning expeditions to cultural institutions and natural environments; opportunities to register for classes at area colleges, vocational schools, and technical schools; on-line, multimedia, and computer-based learning opportunities; workplace opportunities such as local internships and co-op education program; opportunities for organized play and recreation; life experiences such as family travel, personal reading, and hobbies; or participation in community-based activities such as amateur theatre, choir, scouting, or athletics.

In addition, numerous approaches have also been used to effectively bring the outside world into the primary learning environment, these include: internet-based and multi-media learning opportunities brought in from all over the world; opportunities to engage with real-world challenges that are brought in from outside; community-based health and social services brought in to the learners; opportunities to learn from various business and community leaders; and, opportunities for the learners themselves to share their Open-walled learning with each other.

To be called “Open-walled”, a learning model must leverage the rich opportunities available beyond the walls of the primary learning environment and integrate those opportunities into the core of the learning model. Simply providing some Open-walled learning experiences does not make a learning model Open-walled. Even traditional learning models provide some Open-walled learning activities. For example, they may have after-school activities, field trips, and career days. However, that does not necessarily make such learning models Open-walled.

Open-walled learning models have the following characteristics:

- The entire community and its assets (including its people, organizations, and institutions) are seen as the playing field for learning and for supporting learners;
- Virtual and/or on-line opportunities, sourced from anywhere in the world, are effectively leveraged in the primary learning pathways;

- Open-walled experiences are integrated into the whole learning model rather than being “bolted on”. In other words, Open-walled experiences are expected to include the other elements of the model, just like any other learning experience would.
- Open-walled experiences are integrated into each learner’s learning path, assessed similarly to any other learning experience, and counted equally towards the learner’s development.
- Open-walled learning opportunities are configured to leverage the broader community’s unique resources, values, and needs. Open-walled learning models reflect an appropriate mix of in-person, virtual, or blended learning opportunities in the places, times, and formats that are a fit for the learners. This involves adults in non-traditional education roles who participate in providing Open-walled learning pathways and learning experiences.

When Open-walled is a central element in the learning model, it can be depended upon to enable the other elements of the model and to contribute decisively to the development of each learner’s life skills and dispositions. Learners see their learning as being unconstrained by time or place so that Open-walled experiences are naturally recognized and valued. They will be prepared to be life-long learners. We would expect to find the following observable learner outcomes:

- The ability to locate and leverage the assets both in his or her community and on-line;
- The ability to relate to any life experience as a learning experience;
- An increased clarity regarding one’s own interests and passions in life;
- The skills and dispositions needed to be an active community participant and citizen;
- An increased readiness for a work world that is itself becoming more and more Open-walled.

When a learning model is committed to being Open-walled, it can catalyze a network of learning environments which are hosted by a variety of institutions and organizations in the community, including the education system. These institutions and organizations begin to see more and more ways in which one another’s missions and assets can be complementary.

# Distinguishing “Socially Embedded”

We use the term “Socially Embedded” to refer to a learning model where the social nature of learning has been consistently enabled as a central part of the learning experience. This involves ensuring that learners are part of a vital learning community, and that a learner’s relationships within that community provide them with ample opportunities for all forms of social learning. While there is much research into the social nature of learning, one thing is already clear: we learn from and with other people. Learning begins in early life by observing and mimicking others through imitation and play. Certainly, that is how we learn our first language. And, as we learn more complex knowledge, skills, and dispositions we find that our engagement with others remains critical. It is only by engaging with others in conversations that we can see beyond the boundaries of our own experience, that we can gain confidence in the validity of our own discoveries, and that we can make meaning of our own learning. Learning through interaction with both other learners and with adults is a central and irreplaceable component of our learning journeys.

For a learning model to be called “Socially Embedded” it must ensure that each learner experiences themselves as belonging to a learning community. This learning community includes all the learners and adults in the system who regularly meet in the primary learning environment and are connected through their shared purpose of fostering learning. In some learning models, the learning community will extend beyond the primary learning environment to include others from the larger community and beyond. In cases where learners are more distributed (such as those with geographically dispersed learners, virtual learning groups, and home-schooled learners), the creation of a Socially Embedded learning model will require the active invention of a meaningful learning community.

The learning community offers each learner a set of stable, social relationships, providing a context for social learning, guidance, social support, friendships, and play. A learning community is a place where each learner experiences being known for who they are, for their unique interests and styles, and for their unique needs and gifts. The learning community provides a rich context for social learning. This is where social learning happens.

Whenever a learner is engaged with others in the process of learning, we can say that their learning is social. But when we say that a learning model is “Socially Embedded”, we mean more than the mere provision of social learning opportunities. Making a learning model Socially Embedded involves a significant decision to make learning with others in the learning community a central part of each learner’s journey. This requires that each learner’s pathway be planned so that they are engaged sustained relationships that supports their learning.

Who might a learner be engaged with? A learner can be engaged with (1) adults or advanced peers who have something to share with the learner, (2) peers who are addressing the same or a similar learning challenge and who will participate in shared discovery, or (3) peers with whom the learner can share what they have previously discovered about the learning challenge at hand. Socially Embedded learning models make use of all three. Let’s look more closely at each of these categories:

1. Adults or advanced peers who have something to share with the learner. The interaction with these people is centered on supporting the development of some knowledge, skills, and/or dispositions in the learner. A variety of education professionals have been trained to engage with learners to provide: guidance and advice on how to approach learning, coaching on skills and dispositions, mentoring and role modeling with regard to some specific qualities or accomplishments that the mentor has previously attained, and instruction in some particular domain of knowledge or skills. Not only can adults in the system play this role, but often peers further along in their own learning can engage with a learner to provide peer support in these same domains.
2. Peers who are addressing the same or a similar learning challenge and who will participate in shared discovery. Learning with peers involves a conversation for shared discovery. In this conversation, peers generate new discoveries together: building on each other’s thinking, providing each other with outside perspective, and encouraging each other. Peers discuss what they see, what they are learning, and what

they are stopped by. Often peers are assigned to work together on learning tasks, group activities, or group projects. Other times, such peer groups self-organize around the purpose of learning together or simply for the opportunity to be together. When we look at how people learn naturally, we find a large amount of peer-based social learning. Much of what is referred to as unstructured play has this characteristic of shared discovery and represents an important vehicle for learning.

3. Peers with whom the learner can share what they have previously discovered about the learning challenge at hand. Another kind of learning is available through interactive conversation with someone whom you are supporting as they learn. When playing the role of guide, or coach, or instructor, we can discover how well we ourselves have developed proficiency in the particular learning challenge at hand. In addition, by supporting others in their learning, we begin to develop the social and emotional skills necessary for providing that support, including empathy, patience, generosity, and listening.

A Socially Embedded learning model will ensure that each learner forms the meaningful and sustained relationships needed to leverage all three kinds of social learning opportunities. As such, attention is paid to each learner when forming peer groups and when pairing learners with adults in various support roles.

There is no single way in which to ensure a learning model is Socially Embedded and often a single learning opportunity can be designed to facilitate many kinds of social learning. One way in which Socially Embedded learning models ensure that all three types of social learning opportunities are made available to learners is to intentionally create heterogeneous learning groups with learners at various stages of developing themselves to address the learning challenge at hand. Some learning models have formal mentoring, coaching, advisories, or guidance programs that ensure each learner has long term relationships with adults who know and value them as unique individuals. Other models make extensive use of learning cohorts, creating social bonds amongst a group of learners who have occasions to address challenges together over extended periods of time. In still other models, learners are given the challenge of governing their own learning environments together through democratic processes. There seem to be a limitless number of ways to make a model Socially Embedded, but to be called “Socially Embedded”, the model must have found some effective ways to create a learning community and to make learning with others within that community a central part of each learner’s pathway.

When a learning model is Socially Embedded, we would expect to observe the following outcomes for learners that will prepare them for success in life:

- Increased confidence regarding their own knowledge, skills, and dispositions;
- The skills and dispositions needed to support others in their learning;
- The skills and dispositions needed to collaborate successfully on both structured and unstructured challenges;
- The skills and dispositions needed to collaborate successfully with a diversity of people having a variety of: ages, abilities, and proficiency levels; approaches to problem solving; interests and ambitions; socio-economic backgrounds; ethnic and racial backgrounds; and/or family structures; and
- The social-emotional and collaborative skills and dispositions needed to be productive participants in the economy and engaged citizens in society.





