

SUCCESS PLANS

*Promising Tools for Customizing
Student Supports and Opportunities*

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ABOUT THE EDUCATION REDESIGN LAB

In 2014, Paul Reville, Francis Keppel Professor of Practice of Educational Policy and Administration at the Harvard Graduate School of Education and former Secretary of Education for the Commonwealth of Massachusetts, launched the Education Redesign Lab. Our mission is to give every child in the United States the opportunity to succeed in education and in life. We hope to lead a movement to create a new and more comprehensive education model.

ABOUT THE AUTHOR

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Countless studies tell a somber and all too familiar story: an unacceptable number of children and youth in the United States face systemic barriers that impede their access to essential services and opportunities they need to thrive.

Well-documented educational achievement and attainment gaps (including higher dropout rates, lower high school graduation rates, and failure to graduate on time) disproportionately affect children and youth of color and those living in poverty.¹ Opportunity gaps are also expanding to such an extent that “rich kids and poor kids are now growing up in separate and unequal Americas.”²

Given these persistent opportunity and achievement gaps, traditional education reform efforts—those focused primarily on academic or in-school factors—have been necessary but not close to sufficient to prepare all children for success.

One of the critical flaws in our school systems is that their architecture is based on a factory-model logic, a one-size fits all paradigm that doesn’t address the particular, complex, and varied needs of children and youth living in poverty. They don’t customize interventions or otherwise account for the special circumstances, assets, and challenges faced by individual children. They ignore important developmental differences and other variations among children and youth favoring, instead, a logic that suggests equity and equality are synonymous and all children will derive what they need from identical treatment. This approach fails to work for many of our most disadvantaged students.

The limited success of education reform efforts to date demands that we identify and implement more effective strategies to address the multifaceted needs of our youngest citizens. The goal of the [Education Redesign Lab](#) is to fundamentally and dramatically redesign, align, and integrate our systems of child development and education for all children and youth. We must build new systems that are more responsive and nimble and therefore can provide personalized and comprehensive supports and services to all children and youth from cradle to career.

Multiple stakeholders at different levels of our education system have been harnessing promising strategies to provide personalized, integrated, and comprehensive academic and support services for children, youth, and their families. These stakeholders are also building new systems—including enhancing organizational processes and structures, developing innovative digital tools and platforms, and implementing strategic resource allocation strategies—to effectively support and sustain this work.

Personalized plans tailored to each and every young person are an especially promising strategy, and there is a growing body of research about their impact. The Education Redesign Lab is eager to accelerate this innovative approach and build on the efforts already underway in communities across the country. Therefore, we are partnering with local communities and school districts to support the development and implementation of Success Plans. These personalized plans are tools as well as processes for capturing the full range of strengths and needs of children and youth in order to connect them with tailored, seamless, and equitable services and opportunities. Conceptually, the plans represent our commitment to meet all children and youth where they are and give them what they need, inside of school and out, to be successful. Practically, Success Plans are logical tools with which to build new systems focused on *individual* needs.

While personalized plans represent a promising approach, they are largely underemployed in the field of education. The Education Redesign Lab launched a research project to build the field’s collective knowledge about the potential of such plans and to inform future work. In our report, we examine a range of personalized plans and identify key design principles. We have also created a companion toolkit, available on our [website](#) for communities interested in developing and implementing Success Plans.

OUR VISION FOR SUCCESS PLANS

10 GUIDING PRINCIPLES

Personalized plans, coupled with integrated supports, have great promise. Success Plans are important tools and processes for anchoring ongoing work, and Individual Education Plans, Individual Learning Plans, and Personal Opportunity Plans provide important lessons for implementing new strategies and creating new systems. Our vision for Success Plans incorporates elements of these existing plans as well as effective strategies and models to date and was developed in response to several key questions identified. These questions include the following:

- How can personalized plans be designed and implemented to prevent the replication of historic and systemic inequities?
- What types of guidance and support do children and youth need to successfully and productively contribute to the development and implementation of personalized plans?
- How can we build a robust infrastructure to support the successful development and implementation of personalized plans?
- How can we create the conditions necessary to successfully develop and implement personalized plans? For example, how can we ensure that these plans will be regarded as essential tools and processes as opposed to compliance tasks?
- How can we develop both effective and efficient processes for developing and implementing personalized plans?

Many institutions and organizations that challenge traditional assumptions and practices related to supporting children and youth, such as the Harlem Children's Zone, Summit Learning, and LEAP Innovations, also informed our vision for this important work.

Our vision for Success Plans embodies several overarching concepts: these plans will capture in- and out-of-school strengths and needs of children and youth; connect to the infrastructure that can match them with tailored services and opportunities; and seamlessly coordinate education and community resources to increase access to equitable opportunities. Success Plans will promote the development and implementation of proactive, comprehensive, and systemic strategies to recognize, accommodate, and address the needs and strengths of children and youth.



Based on our research and the Education Redesign Lab's own theory of action, we have identified 10 guiding principles that define the concept of Success Plans. Effective Success Plans should be:

- 1 PERSONALIZED:** Celebrate each child's assets and use a customized approach to identify individual strengths, interests, and needs.
- 2 COMPREHENSIVE:** Offer a wide array of academic, health, and other support services to meet the needs of children and youth from cradle to career.
- 3 STUDENT-CENTERED:** Empower children and youth to discover and pursue their academic and non-academic strengths and interests, set short- and long-term goals, and identify needs.
- 4 EQUITABLE:** Target systemic gaps that disproportionately affect marginalized students and ensure that the development and implementation of the plans will increase access to essential supports and opportunities.
- 5 ACTIONABLE:** Establish clear strategies and processes for identifying and delivering supports and services to each child and youth both in and out of school.
- 6 RELATIONSHIP-DRIVEN:** Allocate appropriate staffing to jointly develop and implement the plans with students by fostering mutually respectful relationships and also involve parents, families, and other adults in the process.
- 7 CROSS-SECTOR:** Provide coordinated, comprehensive services by establishing collaborative relationships with partner organizations across multiple sectors.
- 8 INFORMATION-DRIVEN:** Utilize feedback and data from multiple sources, including students, families, and a diverse set of agencies, to regularly assess impact on multiple outcomes and enhance the quality of services provided.
- 9 SECURE:** Use digital platforms that meet high standards of data security and protect student and family privacy.
- 10 SUSTAINABLE:** Identify long-term funding sources and create organizational structures to ensure consistent implementation over time.

Engaging in this work will require a substantial change in mindset on the part of educators, parents and family members, community partners, and other key stakeholders, as we need to think and work differently than we have in the past. Embracing a personalized approach is critical for helping ensure more children and youth can thrive and that we can maximize their potential to be lifelong learners, active citizens, and meaningful contributors to their communities. We hope that Success Plans will help to accelerate this essential work.

EXAMPLES FROM THE FIELD

Our report profiles the work of four entities which are developing and implementing comprehensive plans aligned with our vision for Success Plans. For each entity, we describe the primary components of the models, provide an overview of the plans and the processes by which they are utilized, and discuss governance and management structures, digital tools and platforms, associated costs, and their impact on different outcomes (as information and data are available).

COMPREHENSIVE PLANS

ENTITY	TYPE OF PERSONALIZED PLAN
<p>CITY CONNECTS³ Boston, MA</p>	<p>Tailored student support plans based on assessments of strengths and needs across academic, social/emotional/behavioral, health, and family domains are developed for each and every child. These plans inform the provision of school- and/or community-based prevention, early intervention, crisis intervention, and enrichment services. A proprietary online database, the Student Support Information System, is used to facilitate the implementation of the student support plans, maintain both individual and school records, monitor the provision of services, and collect data to assess the impact of services on multiple outcomes.</p>
<p>COMMUNITIES IN SCHOOLS⁴ Arlington, VA</p>	<p>Assessments of social and emotional development; competencies and skills such as self-regulation, motivation, and engagement; and level of connectivity and relationships with others are conducted to identify students' assets, strengths, and needs and inform the development of individual support plans for students participating in case management. These plans include goals with measurable targets and metrics and identify support services aligned with academic, college and career, physical and mental health, and other categories of support. A comprehensive online data management system licensed by CIS houses multiple years of student data and enables users to create the plans, track progress, and find services.</p>
<p>COLORADO DEPARTMENT OF EDUCATION⁵ Denver, CO</p>	<p>All children enrolled in publicly funded preschool and kindergarten programs in Colorado must have an Individual School Readiness (ISR) plan that is developed based on ongoing assessment of progress across developmental and academic domains, including physical well-being and motor development, social and emotional development, language and comprehension development, cognition and general knowledge, and mathematics and literacy, which have been added to the four areas of readiness. ISRs are intended to include strengths and goals across academic and developmental domains and may include information about needs requiring the provision of support services.</p>
<p>NATIONAL CENTER FOR YOUTH LAW⁶ Oakland, CA</p>	<p>Individualized plans are developed for children and youth involved in child welfare and justice systems. The core of these plans is the identification of student-driven goals, milestones and actions, and obstacles to success. The plans include measures related to academic outcomes, student engagement, empowerment, and other dimensions of social-emotional learning as well as information about the provision of support services. An open source digital platform, EdTeam Connect (ETC), houses multiple types and multiple years of data and supports student-centered education planning, promotes and supports connections with students, and enables the sharing of information and data among educational support team members in real time.</p>

EXAMPLES FROM THE FIELD

Our report also features nine organizations and agencies that are leveraging different types of personalized plans to support children and youth. These plans focus on various categories and illustrate a wide array of approaches that can further inform the broader field. For each entity, we briefly describe each model, including specific strategies and impact to date (as information and data are available).

OTHER TYPES OF PERSONALIZED PLANS

ENTITY	TYPE OF PERSONALIZED PLAN
BIG PICTURE LEARNING⁷ Providence, RI	Individualized learning plans enable students to identify and pursue their interests and passions. Core components of these plans include academic work and progress, a variety of assessments of student exhibitions and other types of work, information about internships and other experiential learning opportunities, postsecondary interests and action items, and referrals for social and other services as needed.
LRNG⁸ Chicago, IL	Using an innovative digital platform that builds and maintains learning ecosystems across cities, students participate in and complete individualized playlists , groups of Learning Experiences (XPs) and related resources organized around themes or interests that enable them to develop knowledge and build skills that they can in turn apply in both academic and career settings. The XPs include different types of learning opportunities that are “designed to be flexible, remixable, and motivational.”
ARIZONA DEPARTMENT OF EDUCATION⁹ Phoenix, AZ	The Education and Career Action Plan (ECAP) is a personalized tool and process that enables high school students to align coursework and extracurricular activities to career pathways that reflect their interests, skills, and values; increases their awareness and knowledge about career options; and builds their awareness of resources related to college and career readiness. The ECAP, which is required, allows all students to upload, monitor, and update academic, career, extracurricular, and postsecondary information.
TREEHOUSE¹⁰ Seattle, WA	Individualized graduation and postsecondary plans are developed for middle and high school students in foster care. The identification of goals and activities to achieve students’ goals are essential elements of these plans, and Treehouse utilizes different types of goal mapping tools and questionnaires to identify students’ interests and identify barriers to success. An in-house, online database is used to collect multiple types of data for these individualized plans, assess growth and progress, and monitor data quality.
ONE DEGREE¹¹ Oakland, CA	The One Degree platform and related mobile applications enable registered users to conduct customized searches for social services and resources based on type of service, location, languages spoken, and other factors; submit applications for services; and review and rate resources and share information with other users. The My Plan tool, a “portable social service portfolio” enables users to create and maintain individualized lists of services and track their utilization over time.
SAY YES TO EDUCATION¹² New York, NY	The Say Yes Postsecondary Planning System is a robust data platform that is used to assess students’ needs and progress over the course of their educational careers, identify and address barriers to success, and collect information that will inform the provision of comprehensive support services. The individual student growth plan is an essential tool that is developed for each student, and it captures longitudinal data for indicators and sub-indicators across academic, health, and social domains.

OTHER TYPES OF PERSONALIZED PLANS

ENTITY	TYPE OF PERSONALIZED PLAN
<p>MASSACHUSETTS DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION¹³ Malden, MA</p>	<p>The My Career and Academic Plan (MyCAP) is a “student-directed, multi-year, dynamic tool” as well as a robust process for developing academic plans, enhancing personal and social growth, and supporting career development for high school students. MyCAP, which is optional for districts, includes three categories of information—Academic, Personal/Social Qualities and Skills, and Workplace Readiness—and the tool incorporates students’ “self-defined interests, needs, and goals for the attainment of postsecondary success.”</p>
<p>YOUTH POLICY INSTITUTE¹⁴ Los Angeles, CA</p>	<p>Individualized service plans are strength- and asset-based plans for elementary, middle, and high school students. They are used to set short- and long-term academic and other goals; identify challenges related to academic achievement, attendance, behavior, and other factors; assess social and emotional well-being, student motivation, and engagement; track growth and progress; and document the provision of social services. Youth Policy Institute is partnering with Salesforce, a customer relationship management platform, to build a new information and data management platform for the organization and support the development of the individualized service plans.</p>
<p>SOCIAL SOLUTIONS¹⁵ Austin, TX</p>	<p>The Apricot 360 case management software developed by Social Solutions enables organizations to utilize multiple metrics to inform decisions, share and manage data for multiple programs and organizations using one platform, and use analytics to enhance the quality of both individual- and aggregate-level services. In addition, organizations can create individual student records that include demographic information and family information; student enrollment in academic and other programs; information about students’ goals, interests, strengths, and needs; and progress to date.</p>

ANALYSIS AND RESEARCH FINDINGS

Based on our review of different types of personalized plans, we identified a set of core issues and insights. An overview of our findings is as follows:

FINDINGS	RELATED INSIGHTS
<p>School-Based Implementation with Organizational and Community Support</p>	<p>For the majority of plans examined for this research project, the work of developing and implementing personalized plans occurs at schools. A core element of school-based models is a school-based coordinator who is either an existing staff member or an individual hired by an external organization or state education agency.</p>
<p>Youth Empowerment and Engagement: Importance of Student-Centered, Student-Driven Plans</p>	<p>Overall, there is a strong emphasis on increasing youth involvement in the use of personalized plans. Many organizations are implementing strategies to build youth empowerment and their confidence to take ownership over their learning experiences and pathways. For some organizations, youth are expected to drive the process of identifying academic, career, and other interests; setting short- and long-term goals; monitoring progress and identifying barriers to success; and maximizing school and community resources.</p>

FINDINGS	RELATED INSIGHTS
<p>Engagement of Parents, Family Members, Guardians, and Other Supportive Adults</p>	<p>While there is variance with regard to the level of involvement of these adults, organizations are implementing different types of strategies to raise the level of overall support for children and youth, strengthen relationships between children/youth and adults and also between supportive adults, and build integrated networks of support for students.</p>
<p>Local Autonomy and Flexibility</p>	<p>Organizations are utilizing a tight-loose model to implement personalized plans whereby system-level requirements regarding their content, structure, and development are coupled with significant levels of local autonomy and flexibility to adapt both tools and processes to reflect community contexts.</p>
<p>Attention to Addressing Issues of Equity and Access</p>	<p>For a majority of the organizations, focusing on specific populations in specific communities is the basis of equity and access work. Given educational attainment, achievement, and opportunity gaps plus significant disparities related to health and other indicators, many organizations are targeting their efforts on children and youth who are the most vulnerable and most in need of assistance.</p>
<p>Variance with Regard to Making Referrals and Providing Comprehensive Support Services</p>	<p>Common elements related to referrals and comprehensive support services include the establishment of partnerships with community-based agencies, local (either school or community) coordinators who serve as primary liaisons to these agencies, and features of digital platforms that allow users to make internal referrals to programs or external referrals to community-based agencies.</p>
<p>Differentiated Access to Data and Proactive Data Agreements</p>	<p>Organizations have either built in-house digital platforms or adapted existing platforms to support the use of personalized plans. These platforms vary regarding the number and type of features, but common components include differentiated access to data by multiple users; the identification of short- or long-term academic, personal, career, or other goals; the creation of dashboards to easily monitor students' progress; analytical tools to aggregate or disaggregate data by different factors; and the ability to upload additional information about the provision of support services.</p>
<p>Lack of Policy Infrastructure</p>	<p>While the passage of the Every Student Succeeds Act (ESSA) and the existence of state regulations and statutes mandating the use of personalized plans are influencing the development and implementation of these plans, few individuals spoke about the importance of the policy infrastructure for this work.</p>
<p>Opportunities for Additional Research</p>	<p>There are opportunities to conduct additional research about the content and structure of plans and their related processes as well as the impact of personalized approaches on larger groups of children, youth, families, and communities. Researchers could also address the desirability and the feasibility of isolating the impact of personalized plans on multiple outcomes. Lastly, researchers could conduct additional research about the impact of personalized plans on subgroups of students.</p>

In addition, we identified common challenges related to the content and structure of plans, implementation (including building individual, collective, and organizational capacity and allocating sufficient resources), and building the infrastructure necessary to support and sustain the work.

FIVE KEY RECOMMENDATIONS

Based on our review of research about personalized plans, exploration of examples from the field, and knowledge about innovative models and strategies, we offer five key recommendations for all stakeholders who are developing and implementing comprehensive and personalized plans for children and youth (view the full set of recommendations in our [report](#)).

1. CREATE A CROSS-SECTOR GOVERNANCE/MANAGEMENT STRUCTURE

- Utilize an existing structure or create a new structure (such as a children’s cabinet) that includes representatives from the education, social services, and other sectors who can address issues across the birth through postsecondary continuum; identify specific roles and responsibilities for each member; and on an ongoing basis, identify specific action items that must be executed.

2. ESTABLISH NETWORKS OF SUPPORT

- Build on existing support structures in schools, districts, and communities to create formal networks that include all adults who are committed to supporting children and youth.

3. DESIGNATE COMMUNITY, DISTRICT, AND/OR SCHOOL COORDINATORS TO FACILITATE THE DEVELOPMENT AND IMPLEMENTATION OF PLANS

- Identify individuals, either existing or new staff members as resources permit, who will be responsible for coordinating processes for developing and implementing personalized plans (school coordinators, similar to existing models for personalized plans, could serve as the primary mentor to children and youth, and district coordinators could be responsible for managing partnerships with community providers and ensuring that services are delivered consistently and efficiently).

4. USE DIGITAL TOOLS THAT ADHERE TO STRICT DATA SECURITY PRACTICES

- Identify priorities and needs related to data collection, management, analysis, and protection during the early stages of work; utilize and build on existing data systems (as appropriate) to build a technology infrastructure; proactively create Memoranda of Understanding or other agreements among appropriate parties; and create clear processes and protocols for data use and sharing to ensure the security and confidentiality of student data.

5. EMBED EQUITY AND ACCESS IN EVERY ASPECT OF THE WORK

- Ensure that personalized plans are strength-based and celebrate the racial/ethnic, cultural, linguistic, and other backgrounds of children and youth; establish high expectations for all children and youth; accommodate multiple styles of learning and development; proactively provide consistent advising, support, and mentoring services; and include indicators and utilize instruments that are culturally sensitive and appropriate.
- Ensure that parents, family members, and guardians have access to informational and other documents in multiple languages; provide both print and online access to these materials; and celebrate the racial/ethnic, linguistic, and other backgrounds of these adults.
- Provide ongoing professional learning and development opportunities to educators, community providers, and others engaged in this work to increase their cultural competency and proactively address unintended biases.
- Ensure that governance and management structures at school, district, and community levels include a diverse group of representatives and maximize their perspectives and expertise.
- Conduct analyses of disaggregated data to monitor the impact of plans and services provided on multiple outcomes.

The movement to implement personalized learning approaches and personalized plans is creating a growing body of knowledge, resources, and lessons learned. Our final recommendation is to build on successes to date, learn from practices that have not achieved desired results, and utilize all types of existing resources to support the successful development and implementation of these plans.



CONCLUSION

Personalized plans, coupled with the provision of comprehensive support services, have the potential to reshape the education and social landscape. If we truly want to reduce—if not eliminate—persistent achievement and opportunity gaps and improve a wide range of outcomes for all children and youth, we must think, work, and act differently. We believe that Success Plans are a powerful lever for changing our practice in education and youth development.

We look forward to learning from and working with allies and partners to foster the increased use of personalized plans and address the challenges associated with their development and implementation. By doing so, we will continue to fulfill our collective commitment to reduce educational, support, and opportunity disparities. The Education Redesign Lab is committed to leveraging all available resources and expertise to attain this mission while building ample community and political will to ensure that all children and youth—and all means all—are prepared for lifelong success and have the opportunity to thrive.

¹National Opportunity to Learn Campaign, Rural School and Community Trust, AFT, Opportunity Action, National School Boards Association, NEA, Alliance for Excellent Education, Institute for Educational Leadership, Collaboration for Community Schools, and the Collaborative for Academic, Social, and Emotional Learning, *Partnerships, Not Pushouts: A Guide for School Board Members; Community Partnerships for Student Success*, April 2014, <https://www.nsba.org/partnership-not-pushout-guide>.

² Harvard Kennedy School, *Closing the Opportunity Gap: A Project of The Saguaro Seminar*, 2016, 3, <http://www.theopportunitygap.com/wp-content/uploads/2015/08/2016-Working-Group-Report.pdf#page=74>.

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¹¹ Source materials are as follows: Rey Faustino, interview by author and Michelle Sedaca, October 23, 2018; One Degree, *One Degree Strategic Plan: 2017 – 2020*, n.d., <https://www.1degree.org/about/strategic-plan>, “How It Works,” One Degree, <https://www.1degree.org/about/how-it-works>.

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