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Middle School Teachers' Perceptions of the Impact of Transitioning to Personalized Learning

Laura E. Hurtienne
Concordia University - Portland, lehurtienne1@gmail.com

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Laura E. Hurtienne
Concordia University - Portland

Concordia University Portland

College of Education

Doctorate of Education Program

WE, THE UNDERSIGNED MEMBERS OF THE DISSERTATION COMMITTEE

CERTIFY THAT WE HAVE READ AND APPROVE THE DISSERTATION OF

Laura Elizabeth Hurtienne

CANDIDATE FOR THE DEGREE OF DOCTOR OF EDUCATION

Dr. Donna Graham, Ph.D., Faculty Chair Dissertation Committee

Dr. Aaron Cooley, Ph.D., Content Specialist

Dr. Patricia P. Shopland, Ed.D., Content Reader

ACCEPTED BY

Joe Mannion, Ed.D.

Provost, Concordia University, Portland

Sheryl Reinisch, Ed.D.

Dean, College of Education, Concordia University, Portland

Jerry McGuire, Ph.D.

Director of Doctoral Studies, Concordia University, Portland

MIDDLE SCHOOL TEACHERS' PERCEPTIONS OF THE IMPACT OF TRANSITIONING TO PERSONALIZED LEARNING

Laura E. Hurtienne, Ed.D.

Concordia University – Portland

College of Education

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Dissertation Chair, Donna Graham, Ph.D.

Committee Member Aaron Cooley, Ph.D.

Committee Member Patricia P. Shopland, Ed.D.

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ABSTRACT

This study focused on the lived experiences of a team of four rural middle school teachers as they made the transformation from traditional classrooms to personalized learning classrooms. The teachers were beginning their third year of personalized learning implementation as the study took place. The researcher investigated participants' perceptions of the implementation of personalized learning in their classrooms. Three research questions focused on the changes that occurred during the transformation to personalized learning. Participants provided data through document review consisting of reflections, coursework, presentations, newspaper articles, and the school district video on personalized learning. In addition, individual interviews and a focus group with participants were conducted. Constructivism theory was used to develop an understanding of the transformation from a traditional classroom model to a personalized learning model. The researcher manually coded the data, and nine themes emerged, which were consolidated into two main themes: (a) participants learned through the transformation process, and (b) students were the focus of the transformation. Participants perceived the transformation to personalized learning as a process—teachers learned through implementation. In placing students at the center of the transformation, the veteran teachers used their best teaching practices to implement the new teaching model. This study contributes to the understanding of the transformation to personalized learning in middle school.

Keywords: *education, transformation, personalized learning, middle school*

DEDICATION

I dedicate this research study to the many individuals who have shaped me throughout my life. I have been incredibly blessed to have grandparents, parents, aunts, uncles, siblings, nieces, nephews, and friends who have taught me lessons steeped in experience and love. If I learned anything through this research process, it was that learning is everywhere; you only have to be willing to open your eyes and see it in the faces and places that surround you. The individuals who have surrounded me have been teachers, sometimes without realizing it—they enabled me to learn simply by being there.

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Chapter 1: Introduction

Presenters at educational seminars often pose the statement, "We are preparing students for jobs not yet created." The expectations of the traditional industrial-age workforce have evolved to include skills developed for the 21st-century workforce (Jaros & Deakin Crick, 2012). For example, in the past, students have been primed for assembly-line positions, wherein they repeat the same task at the same time in a similar way (Wolf, 2010). As the workforce has evolved, many jobs now require innovative and creative leaders who are willing to collaborate with one another (Wagner, 2015). Although much of the workforce has transformed, educators still use many of the traditional, industrial-age approaches, creating a gap between education and the workforce (Zmuda, Curtis, & Ullman, 2015).

Personalized learning (PL) is a method of learning that might be an answer to bridging the gap between the workforce and education (Wolf, 2010). The PL model fosters creativity, innovation, self-regulation, and goal-setting skills (Deakin Crick, 2007; Deakin Crick, Broadfoot, & Claxton, 2004; Garrett, 2008; Pane, Steiner, Baird, & Hamilton, 2015; Sungur & Tekkaya, 2006; Wagner, 2012). Although recently some schools have been implementing PL, questions remain regarding the definition and implementation of PL. This study provides an overview of PL, including implementation issues and benefits and challenges of the transition to the PL model.

Background, Context, History, and Theoretical Framework of the Problem

Background and Context

When asked to envision a classroom, many people might picture a room of approximately 20 desks, arranged in perfect rows, with a teacher standing in the front of the room, writing on a board, leading silent, statuesque students. For many years, this image accurately represented

education in the United States. The U.S. education system has focused on supplying students with the necessary knowledge to become productive members of society. The industrial revolution required schools to produce assembly-line workers to comply with a model that dictated education content (Jaros & Deakin Crick, 2012; Senge et al., 2000; Zmuda et al., 2015). In order to become productive members of society, children gathered to collect information where it was distributed—school. School was the "fountain" at which knowledge was acquired (Laufenberg, 2010). The workforce needed structure, routine, and workers who followed directions; thus, school leaders ensured the next generation of workers possessed these qualities (Senge et al., 2000).

In traditional industrial-age classrooms, students received predetermined knowledge sets, and the task of teachers was to make the experience as engaging as possible (Deakin Crick, 2012, p. 675). Senge et al. (2000) summarized five assumptions about learning in the industrial age: (a) children are deficient, and schools fix them; (b) learning takes place in the head, not in the whole body; (c) everyone learns, or should learn, in the same way; (d) learning takes place in the classroom, not in the world; and (e) there are smart kids and dumb kids (pp. 35–42). Senge et al. also presented four industrial-age assumptions about school: (a) schools are run by specialists who maintain control; (b) knowledge is inherently fragmented; (c) schools communicate "the truth"; and (d) learning is primarily individualistic, and competition accelerates learning (pp. 43–48).

For years, creativity and innovation have been stifled in classrooms and in the workplace (Jaros & Deakin Crick, 2012; Robinson, 2011). However, although the traditional model of education may have been able to fulfill the needs of the industrial age, the nation has continued to change. For example, assembly lines that used to be operated by humans are now often

controlled by machinery. Company leaders have begun seeking individuals who embrace creativity and innovation, rather than those who focus on the past (Grant & Basye, 2014; Zmuda et al., 2015). Some businesses have added workspaces that promote collaboration and comfort in order to elicit a culture of innovation. Yet, with all of the changes to the workforce, education has remained stagnant. Robinson (2011) stated, "In many schools, students are educated from the waist up and attention eventually comes to focus on their head, and particularly on the left side" (p. 117).

As the world has evolved, information has changed locations, from residing in buildings to becoming personally accessible through the Internet. Schools no longer have to be distributers of knowledge; instead, they are becoming developers of learners (Laufenberg, 2010; Senge et al., 2000; Wagner, 2012). In 2010, U.S. Secretary of Education Arne Duncan stated, "The factory model of education is the wrong model for the 21st century" (para. 22–23). However, if school is no longer a place to provide information, what role does it have? Wolf (2010) stated,

> Today's industrial-age, assembly-line educational model—based on fixed time, place, curriculum, and pace—is insufficient in today's society and knowledge-based economy. Our education system must be fundamentally reengineered from a mass production, teaching model to a student-centered, customized learning model to address both the diversity of students' backgrounds and needs as well as our higher expectations for all students. (p. 6)

The educational community has started to take notice of the need to accommodate the changing workforce, and administrators, teachers, and parents have begun to address what should happen next.

History

The purpose of school and the delivery of education have started to change. Increasingly, business leaders have started seeking innovative individuals who can think for themselves (Wagner, 2012). In response, members of the educational community have begun to recognize the need for change (Wolf, 2010). For example, technology has changed information-gathering procedures (Grant & Bayse, 2014). Students now have the facts, dates, and knowledge they used to collect at school in their homes and even in their pockets. Educators must decide how to create classrooms designed for today's students, who need to develop skills far different from those the traditional classroom provided. Zmuda, et al. (2015) stated, "As educators, we cannot design instructional experiences *regardless* [emphasis original] of who the students are; they are vital and relevant to the creation process" (p. 8). Fostering students' innate abilities might be critical in developing a more relevant model of education. Senge et al. (1990) stated,

> Children come fully equipped with an insatiable drive to explore and experiment. Unfortunately, the primary institutions of our society are oriented predominantly toward controlling rather than learning, rewarding individuals for performing for others, rather than cultivating their natural curiosity and impulse to learn. The young child entering school discovers quickly that the name of the game is getting the answers right and avoiding mistakes. (p. 7)

Thus, education no longer means memorizing "right and wrong" answers as it did in the past; instead, education has started to involve the process of learning (Buckingham Shum & Deakin Crick, 2012; Grant & Basye, 2014).

Several authors have tried to facilitate discussions that acknowledge the need for change in education and address how to initiate changes. Robinson (2011) acknowledged three roles of

education: personal, culture, and economic. "Understanding how they interconnect is the key to transforming the education system into a 21st-century process that has creativity and innovation at its center" (Robinson, 2011, pp. 66–67). Gardner (2008) recognized discipline, synthesizing, creativity, respect, and ethical minds as the five "minds" for the future. Wagner (2012) found innovation was the key to education. Senge et al. (2000) stated, "All human beings are born with unique gifts. The healthy functioning of any community depends on its ability to develop each gift" (p. 42). Jacobs (2010) identified 21st-century skills as creativity, innovation, critical thinking, problem solving, communication, and collaboration. Each of these authors has suggested components of learning that can enhance skills for a 21st-century workforce. The educational community must determine how to foster these skills in learners so they are truly prepared for jobs not yet created. "In the past, our country has produced innovators more by accident than by design" (Wagner, 2012, p. 22). Classrooms for the 21st century will provide support for learners to enhance the skills of creativity and innovation (Buckingham Shum & Deakin Crick, 2012; Grant & Basye, 2014; Zmuda et al., 2015). Additionally, technology will augment research practices in classrooms, and facilitators will develop relationships to support the learning process (Grant & Basye, 2014).

School leaders have started to implement a variety of approaches to adapt to the needs of the evolving workforce. For example, educators have initiated the search for a model of education that will support learners in developing 21st-century skills. Some districts have utilized a flipped classroom model, wherein students use technology to complete lessons after school hours. School time allows students to receive extra help and collaborate with peers (Grant & Bayse, 2014). Another model that addresses 21st-century skills is referred to as *blended learning*. In a blended-learning classroom, the teacher uses a combination of online and

face-to-face learning (Grant & Bayse, 2014). A differentiated model designed to develop 21st-century skills has attributes that meet each student where they are in their learning. The differentiated model allows teachers to create and modify lessons for each individual student (Zmuda et al., 2015). In each of these models are concepts that include technology and the development of 21st-century skills.

Although educators have developed many concepts to bridge the gap between education characteristics and workforce needs, this study focused on a model that the researcher has witnessed firsthand—the personalized learning (PL) model. PL classrooms are different from traditional classrooms, even at first glance. Instead of arranging the room in rows or groups of desks, learners can use almost any surface—for example, a counter, table, lap, or clipboard—as a learning platform. Teachers no longer stand at the front of the room, but sit next to learners, guiding them (Wolf, 2010). In PL, teachers are no longer teachers; they become facilitators of learning, and students become the drivers of learning. As leaders, the learners gain different skill sets from those developed in traditional classrooms. Gone are the days of sitting and listening to what they "need" to know; learners choose their educational paths (Grant & Bayse, 2014). Although PL contains elements of other 21st-century models, one of the greatest differences is the amount of choice given to learners.

The 2010 symposium on personalized learning recognized five elements of PL: (a) flexible, anytime/anywhere learning; (b) redefining teacher role; (c) authentic learning opportunities; (d) student-driven learning path; and (e) competency-based progression (Wolf, 2010). In addition, Grant and Bayse (2014) suggested seven characteristics for PL:

- students' interests and abilities are engaged in authentic, real-world activities to promote the learning of content area standards;

- teachers take on the role of facilitators and coaches in the classroom rather than the dispensers of knowledge;
- students take control over the learning paths they take to achieve established goals, building self-efficacy, critical thinking, and creativity skills;
- technology enables students' choices related to what they learn, how they learn, and how they demonstrate their learning;
- formative assessment throughout the learning cycle, supported by digital tools, helps teachers and students address weaknesses and build on strengths;
- progress through subject area content is measured by the demonstration of proficiency in identified skills and understanding; and
- technology is integrated throughout teacher and student experiences to support learning (p. 4).

Personalized learning provides the atmosphere and support for learners to develop 21st-century skills (Wolf, 2010; Zmuda et al., 2015). As educators continue to implement the PL model in classrooms, lifelong learners gain many desirable attributes and skills. Deakin Crick (2004) noted attributes of lifelong learners included growth-orientation, meaning-making ability, critical curiosity, resilience, creativity, learning-relationship orientation, and strategic awareness. Sungur and Tekkaya (2006) found learners in PL classrooms possessed intrinsic goal orientation, task value, elaboration learning strategies, critical thinking, metacognitive self-regulation, effort regulation, and peer learning. Wolf (2010) stated,

> Personalization provides the opportunity to dramatically redefine the very concept of equity: from one that goes beyond providing all students with the same educational inputs

and opportunities to one in which all students have access to a unique learning experience (and resources) based upon their individual needs. (p. 9)

Although researchers have suggested attributes for learners and expectations in PL classrooms (Deakin Crick et al., 2004; Sungur & Tekkaya, 2006), the transformation to PL can still be uncertain. Elementary teachers at the site school were concerned their learners were too young to handle the responsibility of PL. High school teachers at the site school were not sure how to fit PL into the daily schedule and wondered whether PL would prepare learners for college testing. PL is possible at all grade levels; however, teachers have had a difficult time envisioning the change. This study was designed to explore the experiences of four middle school teachers who transformed their classrooms from the traditional learning model to the PL model. Through the experiences of the four professionals, the findings may provide insight into the roles and transformation of teachers who incorporate PL so that future teachers might better understand the transformation.

Theoretical Framework

Classrooms in the United States have looked similar for over 100 years; yet society, industry, and the workforce have evolved (Jacobs, 2010; Rickabaugh, 2016). Recently, members of the educational community have started transitioning to meet the needs of society more effectively; thus, classrooms around the nation have begun to transform (Zmuda et al., 2015). Along with the transformation of classrooms, teachers have started to make drastic changes to the practices they were taught (Wolf, 2010). Understandably, teachers might have a difficult time letting go of the ideas and practices they previously learned—in essence, having to relearn their craft. Mezirow (1997) stated,

> It becomes clear that the goal of adult education is implied by the nature of adult learning and communication: to help the individual become a more autonomous thinker by learning to negotiate his or her own values, meanings, and purposes rather than to uncritically act on those of others. (p. 11)

As teachers engage in the PL transformation process, they should consider their own learning. Mezirow studied the ideas of multiple theorists, including Kuhn (1962), Freire (1970), and Haberman (1971, 1984), to develop transformative learning theory (Kitchenham, 2008). Mezirow's (1991) theory was a constructivist theory that addressed the learning process in adulthood. Adults have years of life experiences, which can shape learning. For veteran teachers, life experiences can encompass years of classroom interactions that shape who they are professionally. Although life experiences are sometimes beneficial, at other times, background knowledge can hinder new learning (Mezirow, 1990). Mezirow (1991) stated, "There is much evidence to support the assertion that we tend to accept and integrate experiences that comfortably fit our frame of reference and to discount those that do not" (p. 32).

In order to provide a framework for reframing ideas, Mezirow (1991) presented 10 phases of the adult learning processes:

1. a disorienting dilemma;
2. self-examination with feelings of guilt or shame;
3. a critical assessment of epistemic, sociocultural, or psychic assumptions;
4. recognition of a connection between one's discontent and the process of transformation;
5. exploration of options for new roles, relationships, and actions;
6. planning a course of action;

7. acquisition of knowledge and skills for implementing one's plan;
8. provisional trying of new roles;
9. building of competence and self-confidence in new roles and relationships; and
10. a reintegration into one's life on the basis of conditions dictated by one's new perspective (p. 168–169).

Teachers engaged in PL are involved in the transformative process, a process that involves more than simply teachers teaching in classrooms (Willink & Jacobs, 2011). Peers, parents, and students may question why a transformation is needed, as well as the validity of PL. Concepts unfamiliar to individuals are not always easily accepted (Kreber, 2012). Overcoming teachers' doubts and the concern of onlookers might be possible, but difficulties may arise. This study was aimed at describing the transformation process from the perspectives of a team of teachers as they transitioned from a traditional teaching model to a PL model.

Statement of the Problem

The problem addressed in this qualitative study was educators' lack of understanding regarding the personalized learning (PL) model. This problem was evident in the concern that PL models have yet to "clarify, formalize, and make more specific new teaching and assessment practices that would be comparable in quality to those familiar with traditional programmes" (Jaros & Deakin Crick, 2007, p. 439). Change initiatives in schools tend to have better outcomes when teachers support the change (Margolis & Nagel, 2006); therefore, it is important for teachers to understand and embrace the transformation to PL (Nary, 2014). Currently, little direction has been given to teachers as they implement personalized learning (Cavanagh, 2014), which could cause failure for programs implementing the PL model (Fullan, 2011).

Purpose of the Study

The purpose of this qualitative study was to collect the perceptions of four rural middle school teachers who transitioned from a traditional teaching model to a personalized learning (PL) model. This study was important because experts have recognized PL as a model that fosters the skills of the 21st-century workforce, which has been evolving from a traditional factory model to a model that encourages creativity and innovation. However, the PL model has not been well-investigated (Zmuda et al., 2014). Middle school teachers transitioning from a traditional model of teaching to a PL model might benefit from the perspectives of teachers who have implemented the new model of teaching and learning successfully.

Research Questions

This study addressed three questions:

1. How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?
2. How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model?
3. How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?

Rationale, Relevance, and Significance of the Study

The rationale for conducting this study was that business leaders need workers who have skills different from the skills associated with the industrial age. Specifically, business leaders now seek individuals with creativity, innovation, and a strong sense of self-motivation (Deakin Crick et al., 2004; Wagner, 2012). Members of the educational community have recognized business leaders' pleas to make changes to help students learn these new skills. School leaders

have sought to support the development of new skills, but are still coming to an understanding of how education might look under a new framework.

The relevance of this study relates to the transitioning of schools from a traditional teaching model to a PL model. PL has been implemented across the United States, and more school leaders have been taking notice (Pane et al., 2015). However, as PL has spread, multiple models have been implemented, which has caused some confusion (Cavanagh, 2014; Zmuda et al., 2014). An understanding of PL from the perspectives of teachers transitioning to it could benefit school stakeholders as they investigate why and how to implement a new model.

This research is significant because more schools across the United States are implementing PL (Pane et al., 2015; Wolf, 2010). As PL is implemented, teachers are an integral part of ensuring a lasting transformation occurs, rather than just a short-term change (Margolis & Nagel, 2006; Nary, 2014). If teachers are unsure about the PL model, the transformation to PL might not last (Fullan, 2001, 2011; Schmuck, Bell, & Bell, 2012). In an effort to foster a better understanding of PL, the findings of this study provide insight for administrators and teachers who transition to PL in the future.

Nature of the Study

The researcher used a qualitative single-case descriptive case study to explore the experiences of teachers who transformed from a traditional model of teaching to a personalized learning model. The qualitative research method engaged the researcher in the data (Marshall & Rossman, 2011), and rich descriptions helped show how the transition to PL might occur. Because of the variety of PL models (Zmuda et al., 2014), the researcher determined a single-case case study of the transformation itself would be most beneficial. A single-case case study of the transformation facilitated a deep understanding of one case involving one model of PL

(Creswell, 2013). The researcher synthesized data to create an image of one transformation to PL for administrators and teachers who might engage in a PL change in the future.

Definitions of Terms

A mutual understanding of terms is imperative in a research study. In the following section, the researcher provides definitions of key terms to clarify vocabulary used in this study. Terms listed have the potential of being misunderstood (Bloomberg & Volpe, 2012); therefore, the definitions provide a common understanding of the terms.

Competency-based learning allows students to address standards, or learning outcomes, when they are academically ready to learn them (Wolf, 2010).

Flexible learning environments include "learning beyond a traditional school day or building through online or blended learning, hands-on opportunities in the community, and instruction offered by a range of teachers, experts, or technologies" (Wolf, 2010, p. 14).

Growth mindset is a condition present when individuals "believe that they can always improve regardless of whether success comes easily or proves to be more elusive" (Zmuda et al., 2015, p. 49).

Innovation is "creative problem solving" (Bowman, as quoted in Wagner, 2012, p. 8).

Learner profiles are rich descriptions of each learner, including interests, learning styles, and background information (Rickabaugh, 2016).

Personalized learning (PL) "is a progressively student-driven model in which students deeply engage in meaningful, authentic, and rigorous challenges to demonstrate desired outcomes" (Zmuda et al., 2014, p. 7).

Project-based learning is a model of learning in which "students work in teams to explore real-world problems and create presentations to share what they have learned" (Parkay, Hass, & Anctil, 2010, p. 318).

Self-regulated learning occurs when students set goals, organize, and reflect on their learning (Senge et al., 2000).

Student-centered learning refers to learning in which student needs are met individually, rather than for a whole group (Zmuda et al., 2014).

Traditional learning occurs when teachers determine what will be learned and how it will be learned. In a traditional classroom, all students receive the same instruction, at the same time, from the teacher, who has a predetermined set of information that is relayed to students (Senge et al., 2000).

Transformation occurs when significant, lasting changes are made to an organization (Goldsworthy, Supovitz, & Riggan, 2013).

Voice and choice is a phrase used to describe giving learners the ability to have a say in what they learn and how they learn it (Ripp, 2016).

Assumptions, Delimitations, and Limitations

Assumptions were made for the purpose of this research.

1. The researcher assumed that all four teachers had an understanding of PL and had techniques for implementing the model in the classroom.
2. The researcher assumed that the four middle school teachers were practicing PL in their classrooms.
3. The researcher assumed the four teachers were honest and transparent in sharing their perspectives of the transformation to PL.

This study was delimited by certain boundaries, which provided parameters for the scope of the study (Creswell, 2013). In this case, four middle school teachers from the study site school were the boundary. The four middle school teachers transitioned from a traditional model of teaching to a PL model as a team. PL models can vary in implementation; therefore, choosing to investigate one team that transitioned to PL provided continuity in the PL model. Additionally, the team invited to participate was the first to begin implementation of PL at the study site school; therefore, the perspectives of these four teachers potentially provided fresh, in-depth data.

Certain limitations affected this research study. The first limitation was the small sample size of four individuals invited to participate. However, the small sample size helped the researcher gain a deep understanding of the perspectives of the four individuals. Another limitation was the focus on one school district. The researcher chose to study one school district because models of PL vary from school to school. Investigating one district kept the number of variables in the study to a minimum. The third limitation of this study was that the participants worked in the same building as the researcher; however, the researcher did not have day-to-day contact with the participants. Additionally, the researcher did not have authority over the participants. A fourth limitation of this study was that the lived experiences of the four teachers represented one snapshot in time; in another place and time, the participants' perspectives might have been different. Yet, the information gleaned from the four individuals could allow educators in other districts and grade levels to gain a better understanding of the transition to PL.

Summary

Education should prepare students for the workforce they will enter. However, change is occurring so quickly in the 21st century that educators have found it difficult to identify the skills

students should possess. Personalized learning (PL) has been recognized as one way to develop skills in learners so they can be prepared for jobs not yet created (Deakin Crick, 2015; Zmuda et al., 2015). Hallowell (2011) stated, "Connection, both to a person and to an endeavor, is crucial because when a person connects with another person or a task, his mind changes for the better" (p. 86). When transformation occurs in a school setting, teachers are integral in the change process; therefore, it is imperative that teachers understand the reasons for the transition, accept their roles in the transition, and receive support through the process (Margolis & Nagel, 2006; Nary, 2014). This qualitative single-case descriptive case study was designed to explore the transition to PL from the perspectives of four teachers. The purpose of the study was to provide insight for administrators and teachers who might transition to PL in the future.

Chapter 2 outlines the literature regarding transformation in schools and provides an overview of personalized learning, methodological issues, and the conceptual framework. Chapter 3 focuses on the methodology, the research questions, and the purpose and design of the study, providing the framework for data collection and analysis. The chapter also contains a discussion of the credibility and dependability of the study, ethical issues, and the researcher's position. Chapter 4 provides a description of the research findings, detailed with the participants' direct words. In Chapter 5, the researcher presents the findings of the study, implications of the findings, and recommendations for future research and practices, based on the findings.

Chapter 2: Literature Review

Teachers at professional development seminars often hear speakers state that school is preparing students for jobs not yet created. Although teachers should prepare students for an evolving workforce, the traditional model of teaching does not adequately support the development of skills for an unknown future (Senge et al., 2000; Zmuda et al., 2015). Many current classroom practices seem to be relics from the past, focused on developing skills for a workforce of the past in which workers were told what to do and how to do it (Grant & Basye, 2014; Jaros & Deakin Crick, 2012; Zmuda et al., 2015). As educators look to the future, a change is necessary to meet the evolving needs of companies and organizations (Wagner, 2012), in which individuals are encouraged to initiate ideas and think for themselves. Creativity and innovation are replacing uniformity in the workforce; therefore, schools must find ways to foster new skills to support this change (Wolf, 2010).

School leaders who have recognized the workforce's requirement for change have engaged in a quest to find the answer to bridge the gap between educational content and workforce needs. Various educational models have been applied to bolster the skills of innovation, creativity, leadership, and self-regulation (Deakin Crick et al., 2004; Jaros & Deakin Crick, 2007; Wagner, 2012). However, administrators have the task of finding the best and most attainable fit for each district. One model gaining popularity in schools in the United States is referred to as personalized learning (PL). PL is a model of learning in which students become learners and teachers become facilitators. Learners are encouraged to take charge of their own educational paths while facilitators encourage, assist, and guide learners along the way (Deakin Crick, 2012). PL fosters an environment of choice, flexibility, and community. PL classrooms are often identifiable by a physical transformation, wherein desks and rows are absent, replaced

by couches and comfortable seating; however, although striking, the physical transformation does not define personalized learning but rather aids in supporting the philosophies behind it. PL fosters skills that can prepare students for jobs not yet created; however, implementation also means making extensive changes to classrooms and to individuals connected to learning environments (Wolf, 2010).

District leaders who have recognized the evolving nature of the modern workforce might look to personalized learning as a means to prepare students for an uncertain future (Zmuda et al., 2015). As school leaders prepare to make changes, they have the task of initiating the change process, which may involve a process of collaborating, building and fostering relationships, and providing guidance (Fullan, 2001). School leaders are called to educate, support, and facilitate the change process, providing a strong foundation, which is the driving force of lasting change (Fullan, 2001). Teachers are expected to make the change from a traditional model to a personalized learning model; thus, they must develop an understanding of the need for change, the similarities and differences in teaching models, and how to implement the change.

The purposes of this study were to explore the lived experiences of teachers as they transitioned from a traditional model of teaching to a personalized learning model and to provide insight to help future classroom teachers transition to personalized learning. The literature review provides a framework for this study and reveals the gap in the research (Marshall & Rossman, 2011). Transformational change in schools is outlined, followed by discussions of the teachers' role in the change process and the leaders who support the transformation. In addition, the idea of personalized learning is explored, including the effectiveness of PL, as well as how a PL model can be implemented in the classroom.

Theoretical Framework

This study used social constructivism theory to develop meaning from the perspectives of four personalized learning (PL) teachers as they engaged in transitioning from a traditional learning model to a personalized learning model. Social constructivism involves investigating a phenomenon to develop an understanding of how participants construct meaning (Bloomberg & Volpe, 2012; Creswell, 2003; Omrod, 2008). Although the attributes of lifelong learners have been studied (Deakin Crick et al., 2004; Sungur & Tekkaya, 2006), the roles of teachers in a PL classroom have not yet been clearly defined. Through a case-study design, the researcher constructed meaning from the perspectives of four PL teachers who had engaged in the transformation to PL. The researcher used data collected from a document review, as well as from broad questioning in individual interviews and a focus group session. The intimate conversations provided the researcher with a better understanding of the transition to PL from the teachers' perspectives (Creswell, 2013). With the data collected, the researcher constructed meaning in order to provide insight for future PL educators.

Traditional classrooms are generally teacher-centered, with a preplanned path, taught in the same way for every student in preparation for an industrial-age workforce (Jaros & Deakin Crick, 2012; Senge et al., 2000; Zmuda et al., 2015). As the transformation to PL occurs, student skills—for example, creativity, innovation, goal orientation, and self-regulation—are developed for a 21st-century workforce (Deakin Crick, 2007; Deakin Crick et al., 2004; Garrett, 2008; Pane et al., 2015; Sungur & Tekkaya, 2006; Wagner, 2012). To make the transformation to PL, teachers engage in transformational learning, which includes teacher advocacy, teacher buy-in, and professional development (Bosso, 2014; Goldsworthy et al., 2013; Karmeshu, Raman, &

Nedungadi, 2012; Margolis & Nagel, 2006; Nary, 2014; U.S. DOE, 2014). Using a social constructivist framework, this study focused on the teacher's role in the transformation process.

Review of Research Literature and Methodological Literature

Transformational Change in Schools

Zmuda et al. (2014) warned, "Breaking through the barriers of a 19th-century schedule with a 20th-century curriculum designed for 21st-century learners will be inherently uncomfortable" (p. 6). The transition from teacher to facilitator and student to learner in middle school classrooms requires change, a process with which school leaders sometimes struggle (Jorgensen, 2006). In traditional classrooms, learners consider parents and teachers experts with all the answers (Dembo & Eaton, 2000), rather than human beings who have as many questions as have their learners. In addition, although researchers have defined personalized learning, the definition can be interpreted in various ways, causing serious confusion. Zmuda et al. (2014) defined PL as "a progressively student-driven model in which students deeply engage in meaningful, authentic, and rigorous challenges to demonstrate desired outcomes" (p. 7). Another working definition of personalized learning is as follows:

> Personalized learning seeks to accelerate student learning by tailoring the instructional environment—what, when, how and where students learn—to address the individual needs, skills and interests of each student. Students can take ownership of their own learning, while also developing deep, personal connections with each other, their teachers, and other adults. While some school districts have bought in to the idea of a PL model, others have questions. (Personalized Learning, 2014, p. 1)

The definitions for personalized learning highlight the differences in the roles of teachers and students. In personalized learning, the learner is the focus of the classroom (Grant & Basye,

2014), and learning experiences are applicable to real life. In the traditional classroom, teachers are leaders; in PL, they become coaches, or facilitators, of learning (Zmuda et al., 2015). "Personalizing learning refers to the structures, policies, and practices that promote relationships based on mutual respect, trust, collaboration, and support" (Breulin et al., 2005, p. 24). These new roles require new skills for both facilitators and learners. Zmuda et al. stated, "This requires frequent check-ins, supporting students in progressing through their plans, and offering a suggestion here and there as to how a student can succeed or resolve a dilemma; we are engaged in a constant process of mentoring" (p. 113). Students transitioning from traditional to personalized education leave a world of right-or-wrong answers and instructions from adults and move toward finding solutions on their own (Deakin Crick, 2012). However, although the freedoms of personalized learning might seem exciting, some learners are not sure what to do without an adult directing their actions—the way they have learned throughout their academic careers (Ripp, 2016).

Teachers in PL classrooms move from leading to facilitating, taking a secondary role in the classroom (Grant & Basye, 2014). Rather than being fountains of knowledge spewing to classrooms of minds, PL teachers provide guidance and support to learners (Zmuda et al., 2015). Teachers have found their roles in the PL classroom different from their roles in a traditional classroom, yet the differences have not yet been clearly defined (Brown, 2002; Jaros & Deakin Crick, 2007). Jorgenson (2006) stated, "Overall, then, the single greatest obstacle to implementing curricular change and, over time, establishing a culture that values continuous reflection and improvement in a school, is the general predisposition of educators to resist change itself" (sec. 6, para 2).

The change process in an educational setting becomes evident when organizations become true learning organizations, in which new knowledge, even for adults, is the focus of the change (Giesecke & McNeil, 2004). Members of learning organizations recognize the development of new ideas is continuous (Bersin, 2012). Although schools whose leaders implement a personalized learning approach might show attributes of learning organizations, the change process can be quite daunting (Fullan, 2011). Jorgensen (2006) suggested school leaders seeking to transition to personalized learning should make small changes, be patient, make time to reflect, and support the change with the resources needed to move forward. Lewin's change theory showed a cyclical approach to change, consisting of three phases: unfreeze, change, and refreeze (as cited in Burnes, 2004). Fullan (2011) noted the change leader has a plan and sticks to it; is motivated, collaborative, confident; and learns along with the rest of the organization. Regardless of the approach to change, "All organizations are organic and perishable. They are created by people and they need to be constantly re-created if they are to survive" (Robinson, 2011, p. 13). Thus, the transition to a personalized learning model is not only about how classrooms transform during the learning process, but about how the organization as a whole transforms. Teachers, as individuals who bridge the gap between administrators and the classroom, should be integral in the transformation process (Margolis & Nagel, 2006).

Teaching in organizational change. Margolis and Nagel (2006) investigated a school going through a reform. They recommended leaders whose schools are transitioning to PL ask, "What is it like to teach amidst educational change?" (p. 144). Data were collected through interviews, observational field notes, and professional development reflections (Margolis & Nagel, 2006). A phenomenological design produced a thorough description of the experiences of teachers as they engaged in the change process (Margolis & Nagel, 2006). Margolis and

Nagel engaged in "repeated readings of interview transcripts and field notes from conversations with teachers and administrators as well as their own writings" (p. 150). The researchers used triangulation, collecting at least three different types of data to prevent misinterpretation (Creswell, 2013), creating a deep understanding of the phenomenon (Bloomberg & Volpe, 2012).

Three themes emerged from the data: (a) teachers and the structures utilized to implement change have a "complex interactive relationship"; (b) the energy teachers provide in a reform is important to the reform viability; and (c) the way a teacher feels about a reform and his or her role in the reform can contribute to the viability of the reform (Margolis & Nagel, 2006, p. 155). Ultimately, "Even the most well-funded and well-researched reform effort will not succeed without teacher buy-in" (Margolis & Nagel, 2006, p. 157). The information gained from this study is transferable to the implementation of personalized learning, wherein the support of teachers is instrumental in promoting lasting change.

Transformation. Lasting change is better described as *transformation*. Using a phenomenological approach, Goldsworthy et al. (2013) investigated change, and more specifically, transformation in schools. Their large-scale qualitative study included observations and interviews at 16 New York schools (Goldsworthy et al., 2013). The researchers interviewed each participant one time, collecting 93 interviews. Goldsworthy et al. focused on four main research questions:

1. How did school faculty understand the purpose of their work implementing the Common Core learning standards?
2. How were schools structuring and organizing to engage with the Common Core learning standards and their demands?

3. What factors, both internal and external to schools, were facilitating and/or impeding Common Core learning standards implementation?
4. In what ways were the standards-driven adjustments changing practices in schools? (p. 4)

The data were analyzed with a framework of over 25 codes, which were tested and refined to find themes (Goldsworthy et al., 2013). Based upon the responses, the researchers distributed the schools on a continuum of engagement, from conservation-oriented to transformation-oriented schools. Conservation-oriented schools were described as those whose leaders were taking small steps toward change, allowing more time for the change to occur (Goldsworthy et al., 2013). The conservation-oriented schools were recognized as not as engaged in the implementation of the reform (Goldsworthy et al., 2013). Transformation-oriented schools, on the other hand, were more engaged in the change process, creating new units and assessments to align with the standards (Goldsworthy et al., 2013). Although the transformation-oriented school leaders "did not have all of the answers, they made substantial progress by being more willing to grapple with the questions, and this resulted in a more robust understanding of the standards and their implications for teaching and learning" (Goldsworthy et al., 2013, p. 37). Transformation-orientation can be instrumental in the development of personalized learning as teachers reconstruct their teaching beliefs (Grant & Basye, 2014; Margolis & Nagel, 2006; Mezirow, 1991).

Teacher-led reform. In a third qualitative study, Nary (2014) focused on a teacher-led literacy reform. Participants included 11 elementary teachers from three schools in one school district where Nary was employed as a reading specialist. As an employee of the district, Nary claimed that her involvement in the school would benefit the study by providing her with access

to information in the district. The perceptions of the 11 teachers were analyzed through a case-study design (Nary, 2014).

Nary (2014) used three types of interviews for data collection: didactic, individual, and focus groups, noting the importance of using multiple interviews to allow participants a chance for reflection and further consideration. A hermeneutic circle method was chosen to analyze data, in order to allow the case study to evolve as data were collected (Nary, 2014). Three main results of the study emerged. First, teachers were a part of the reform because of their strong beliefs that the reform consisted of a framework for literacy, rather than a core curriculum (Nary, 2014). The fear of disengagement, if a core curriculum was adopted, created a bond, empowering the teachers to be a part of the reform and thus ensured a framework was used instead (Nary, 2014). Second, teachers continued to be engaged in the change because of empowerment, teacher leadership, and the "middle-out" structure of the reform in which teachers led change efforts (Nary, 2014). Third, through the process of creating a framework, the teachers were able to internalize the standards and have a better understanding of the skills students should master in the school year (Nary, 2014). Overall, collaborative, middle-out reform was beneficial to students and teachers (Nary, 2014).

In addition, Nary (2014) noted teachers recognized that short-term efforts to make changes were difficult; however, teachers indicated the work to make the changes was beneficial long-term. School leaders investigating personalized learning could use this information in the implementation of a PL model. The design process could include teachers, providing perspectives that would aid in the implementation. Teachers should recognize that change could be difficult, yet is worth the effort (Fullan, 2011; Nary, 2014). Developing an understanding of

the transformation process and teachers' roles in PL could help to facilitate a change that is accepted and lasting (Schmuck et al., 2012).

Educational reform experiences. Bosso (2014) investigated the experiences of teachers going through educational reform. Bosso's phenomenological study used semistructured interviews to gain insight on reform experiences from a purposeful sample of 24 teachers who had been voted State Teachers of the Year. Bosso had two research questions:

1. How do teachers experience the influence of educational reform efforts on the evolution of their professional identities, in their classroom practices, and with their overall morale, self-efficacy, engagement, and job satisfaction?
2. How do teachers' professional experiences, perspectives, interpersonal interactions, growth, philosophies, and other aspects of teaching and schooling reflect their attitudes and views of educational reform, as well as their perceptions of themselves as professionals and of the teach profession more broadly? (p. 53)

After the data were analyzed and coded, six themes emerged: (a) the emotional dynamics of teachers' lives, (b) external views of the profession, (c) school culture, (d) professional growth, (e) sense of efficacy, and (f) teacher advocacy (Bosso, 2014, p. vii). Bosso stated, "Emotionally intelligent, authentic, distributive, moral, and transformational models of leadership, more so than those characterized by control, bureaucratization, compliance, and oversight, contribute to positive teacher motivation, morale, and efficacy" (p. 236). As teachers were immersed in reform efforts, they acknowledged the need for leaders who were supportive and allowed teachers to have a voice (Bosso, 2014). As in other reforms, teachers can be central to the development of PL if they are supported by leaders who are willing to engage and encourage them (Margolis & Nagel, 2006; Nary, 2014). Teachers who have the benefit of immersion in the

classroom can assist in the development of and transformation to a PL model (Zmuda et al., 2014); however, a better understanding is needed regarding what the change means for teachers.

Personalized Learning

The transformation to personalized learning (PL) has the potential to be an exciting yet challenging time for schools. As leaders in the field of education consider a new focus on learning, both students and the workforce are pieces of the puzzle that administrators and teachers must try to fit together. Robinson (2011) stated, "Given the speed of change, governments and businesses throughout the world recognize that education and training are the keys to the future, and they emphasize the vital need to develop powers of creativity and innovation" (p. 6). Personalized learning is a model of education wherein learners are at the center of creative and innovative learning; PL could be the answer to the educational dilemma. In exploring PL, administrators and educators should first develop background knowledge of the benefits and implementation of PL.

Implementing PL. The U.S. Department of Education (U.S. DOE; 2014) defined PL as a student-centered model of learning, with teachers as facilitators. Four Race to the Top schools were awarded grants by the U.S. DOE in their first year of implementing PL, and case studies were done at each school. Although all the study schools implemented PL, the methods of implementation, period of implementation, and expectations were unique to each school (U.S. DOE, 2014), a common practice in PL (Cavanagh, 2014; Zmuda et al., 2014). Size of student bodies also varied greatly in size, from just under 12,000 students in three grades to just under 12,000 students in 13 grades (U.S. DOE, 2014).

Three methods of data collection were used in the U.S. DOE (2014) case studies: meetings with district leaders, principals, coaches, and teachers; focus groups; and classroom

observations. Three issues with implementation were acknowledged: Teachers had difficulties (a) envisioning PL; (b) implementing technology, both technologically and in regards to teacher readiness; and (c) aligning with Common Core standards or redesigning standards (U.S. DOE, 2014). The study authors noted four similar approaches found at the schools as PL was implemented: (a) blended learning (online and in classroom); (b) individualized student learning plans; (c) assessment based on progress and mastery; and (d) the engagement and empowerment of students, teachers, parents, and the communities (U.S. DOE, 2014). In addition, the four schools used five common implementation methods: (a) enhanced technology, (b) teachers as student supports, (c) changed physical spaces to accommodate student learning, (d) data and assessments used to inform instruction, and (e) emphasis on skills needed for students' futures (U.S. DOE, 2014).

Leaders at each school reported unique struggles and triumphs in implementing PL in the U.S. DOE (2014) study. For example, school leaders noted the benefits of having appropriate funding, coaches onsite, technology available to everyone, and support from school counselors (U.S. DOE, 2014). Challenges came in the form of gaining funding (especially for technology), adopting new curricula, and encountering resistance from teachers and students in adapting to a new learning model (U.S. DOE, 2014; Zmuda et al., 2014). The school leaders recognized the need for teachers and students to see PL in action (U.S. DOE, 2014). District leaders worked to create a clearer picture of PL through providing professional development, offering summer school courses as trials, slowing down the implementation process, and utilizing coaches (U.S. DOE, 2014). The findings of the U.S. DOE study created a foundation for what might benefit schools as PL comes to fruition.

Effectiveness and implementation of PL. School leaders have grappled with the implementation of PL because there are no guidelines for exactly what PL should look like or how it should filter into the classroom (Cavanagh, 2014). The Bill & Melinda Gates Foundation engaged RAND to analyze the effectiveness of PL implementation in 32 schools, and researchers analyzed achievement in PL in 62 schools (Pane et al., 2015). As in the U.S. DOE (2014) study, the schools in the RAND study used a variety of methods to implement PL; however, five common practices emerged. School leaders (a) collected learner profiles, (b) promoted student-led learning paths, (c) used competency-based assessments, (d) incorporated flexible learning environments, and (e) focused on college and career readiness (Pane et al., 2015).

Pane et al. (2015) gathered both qualitative and quantitative data from the study schools in eight ways: (a) site visits, (b) interviews with administrators, (c) teacher logs, (d) teacher surveys, (e) student surveys, (f) national surveys, (g) achievement data for PL students, and (h) achievement data for comparison group of students. The researchers noted a limitation in using a comparison group; however, a matched-comparison design was used to determine who would participate in the PL group and the comparison group (Pane et al., 2015). A second limitation was the perceptions of stakeholders, because of the researchers' inability to determine the accuracy of responses (Pane et al., 2015).

Pane et al. (2015) analyzed the implementation of PL in the five categories of common practices. Teachers used data to monitor student abilities; however, learner profiles were not used to set personal goals and visions for the future (Pane et al., 2015). The personal learning paths the school leaders intended to apply in PL classrooms, including out-of-the-classroom experiences, varied among the schools (Pane et al., 2015). Although 75% of the schools utilized student voice and choice and teacher support, mainly through project-based learning, fewer

opportunities were available for out-of-the-classroom learning opportunities (Pane et al., 2015). Pane et al. determined competency-based progression was used to an extent; however, grade-level standards were a barrier to student progression. Flexible learning environments were beneficial to the PL classroom, including extra time in a school day or the school year, varied teacher roles, technology, and learning spaces (i.e., classrooms; Pane et al., 2015). One of the main benefits to incorporating flexible learning environments was the ability to group students so they could receive the necessary support from teachers and interventionists (Pane et al., 2015). The school leaders in the study recognized the importance of helping students prepare for college and or careers, develop life skills, and plan for their futures (Pane et al., 2015).

Overall, Pane et al. (2015) found positive effects on achievement from implementing PL, with documented substantial growth in both reading and math. Many students who were some of the lower achievers going into PL had growth greater than that of their peers after engaging in PL (Pane et al., 2015). Elements of PL found in the most successful schools (the schools with "estimated treatment effects that were statistically significant and larger than 0.2 in both math and reading"; p. 29) included (a) grouping student, (c) creating learning spaces that supported the PL model, and (c) helping students become aware of and have discussions regarding their data (Pane et al., 2015). Pane et al. found the three elements were important to PL; however, the small sample size and variations in implementation were also noted as concerns. The findings from the Pane et al. study and the U.S. DOE (2014) study can assist school leaders in developing an image of how PL might appear; however, a lack of information remains regarding the roles of teachers through this transformation process.

Teacher training. Karmeshu, Raman, and Nedungadi (2012) stated, "One of the short comings of the mandatory nature of the educational innovation is that it leads to top-down policy

which poses serious challenge in its implementation" (p. 587). Teachers are an integral component of transformation (Margolis & Nagel, 2006; Nary, 2014); therefore, it is important to understand how to support teachers as schools evolve. Karmeshu et al. (2012) examined one case study of 261 teachers who had one year of experience implementing PL. The researchers investigated the most significant attributes needed for teachers in implementing PL. Teachers answered a questionnaire based on eight factors for successful adoption of PL: teacher training, teacher incentives, workload, peer influence, school support, perceived usefulness, perceived ease of use, and compatibility (Karmeshu et al., 2012). Participants used a 5-point Likert scale ranging from *strongly disagree* to *strongly agree* to identify the attributes that helped them in implementing PL (Karmeshu et al., 2012). Of the eight factors, teacher training emerged as the most significant (Karmeshu et al., 2012). The researchers deduced, "The rate at which teachers adopt the personalized learning framework will also determine the likelihood of the success of the personalized learning framework" (Karmeshu et al., 2012, p. 590). When teachers are engaged in the transformation, they can support learners in the change process as well (Senge et al., 2000).

Student engagement in learning. In developing PL, school leaders should consider student engagement, an essential factor that can result in higher attendance and test scores (Klem & Connell, 2004). In an empirical study on student engagement, Deakin Crick et al. (2004) constructed an instrument entitled Evaluating Lifelong Learning Inventory (ELLI). The ELLI was developed to collect information regarding how to engage learners in effective learning and to determine which attributes support student-centered learning (Deakin Crick et al., 2004). Ultimately, the researchers' aim was to create an assessment instrument for lifelong learning that could be utilized in PL classrooms.

Using 97 components thought to evoke student engagement, Deakin Crick et al. (2004) administered a questionnaire to students. Students rated themselves on each component of the ELLI, using a 5-point Likert scale (*almost never* to *nearly always*; Deakin Crick et al., 2004). The researchers analyzed multiple age groups and genders through several phases of the study and refined the components to determine which attributes were true indicators of student engagement in lifelong learning (Deakin Crick et al., 2004). Statistical analyses included confirmatory factor analysis, varimax rotation, and a scree plot; seven components were determined to be lifelong learning skills (Deakin Crick et al., 2004). The final seven attributes were (a) growth-orientation, (b) meaning-making, (c) critical curiosity, (d) resilience, (e) creativity, (f) learning relationships, and (g) strategic awareness (Deakin Crick et al., 2004, p. 265). Thus, as teachers develop plans for student-centered learning in PL, the seven attributes that support lifelong learners can be considered.

Student performance in PL. Although attributes for lifelong learners have been suggested (Deakin Crick et al., 2004), educators should also consider how those attributes are developed. Sungur and Tekkaya (2006) investigated the effects of different styles of teaching on learning. Sungur and Tekkaya studied the classroom of one teacher who applied two different styles of learning. One of the classes in the study comprised the control group, and the other was the experimental group (Sungur & Tekkaya, 2006). The control group received teacher-centered instruction, and the experimental group engaged in problem-based learning, a more student-centered approach to learning (Sungur & Tekkaya, 2006). Students answered a questionnaire containing motivation and learning-strategies sections (Sungur & Tekkaya, 2006). The questionnaire was given as a pretest and a posttest to determine the change in students after receiving each instructional method (Sungur & Tekkaya, 2006). The study results showed the

student-centered, experimental group had "higher levels of intrinsic goal orientation, task value, use of elaboration learning strategies, critical thinking, metacognitive self-regulation, effort regulation, and peer learning", than the control group (Sungur & Tekkaya, 2006, p. 307). Many of the skills learners developed in the student-centered classroom are beneficial in preparing for 21st century jobs (Senge et al., 2000; Wagner, 2012; Zmuda et al., 2015).

Classroom management in student-centered learning. In a student-centered learning environment such as PL, learning is a combined effort by teachers and students, rather than a distribution of knowledge from teachers to students (Garrett, 2008, p. 34). The concept of student-centered classrooms is different from a traditional model of teaching, wherein students are the receivers of knowledge. The differences in classroom models might be evident in classroom management. In a multicase case study, Garrett (2008) studied the relationship between classroom instruction and management in student-centered classrooms. Garrett's research question stated, "Do teachers who use student-centered instruction also implement student-centered management?" (p. 34). A suburban K–6 school of 615 students was chosen for the study site (Garrett, 2008). Garrett asked the principal to score teachers on a teacher-centered to student-centered continuum to determine which teachers were using approaches that were more student-centered. Teachers also self-reported, using the same continuum (Garrett, 2008). Garrett identified three classroom teachers who appeared on both lists and invited the individuals to participate in the study.

Data for the study were collected in three ways: (a) teachers completed a 20-item survey; (b) three semistructured interviews per teacher were completed—one before observations began, one during the observation period, and one after observations; and (c) four observations per classroom were conducted with a nonparticipant observer (Garrett, 2008). Garrett used member

checking and triangulation to ensure validity. Coding and analysis encompassed five categories: (a) physical design, (b) rules/routines, (c) community building/relationships, (d) motivation, and (e) discipline (Garrett, 2008).

The strategies teachers used in the classroom were labeled *teacher-centered* or *student-centered*, based on the continuum filled out by principals and teachers prior to participant invitations (Garrett, 2008). Garrett found that although some student-centered classroom management occurred, such as students creating rules and conflict resolution, all three of the participants still applied teacher-centered classroom management strategies, such as classroom routines and discipline. Prior to the study, participating teachers had not considered trying to match the classroom management style to the model of instruction, a finding Garrett acknowledged as needing more research. "Students who were participating in challenging, meaningful activities have little need or opportunity to be off-task or disruptive" (Garrett, 2008, p. 42). Student-led learning creates intrinsic motivation, which could result in little need for discipline. The challenge often lies in recognizing what motivates learners, while also meeting state standards and fostering a variety of skills (Grant & Bayse, 2014; Rickabaugh, 2016).

Review of Methodological Issues

Implementation practices for PL models of education are not one-size-fits-all (Pane et al., 2015; U.S. DOE, 2014; Zmuda et al., 2014). Beliefs about and methods for transitioning classrooms from traditional to PL models vary widely. For example, some schools adhere to a prescribed formula for PL, and others allow the initiative to grow organically (Wolf, 2010). At the time of this writing, the school involved in the current study practiced multiple models of PL, because district leaders believed teachers should be allowed to manage the initiative. One model used in the school included cross-disciplinary teams of two teachers, with approximately 40

learners, wherein students decided how to indicate mastery of standards. The classroom, originally two rooms, resembled a home rather than a classroom, with dining room tables, a sofa, and a variety of plush chairs. Another model in the site school included a team of four content-focused teachers working in their own classrooms. In this model, classrooms were arranged in typical classroom fashion, with rows or groups of desks, but also containing some soft chairs or sofas. Classrooms at the site school were beginning to mirror what some large companies have put into practice, making the work environment more comfortable and less institutional.

This study concentrated on one version of a personalized learning model, conducted with one team of teachers who shared one vision of PL. Collecting rich, thick descriptions of qualitative research should portray deeper understandings of the transition between a traditional teaching model to a PL model (Bloomberg & Volpe, 2012), thus providing a holistic approach (Marshall & Rossman, 2011). In addition, personalized learning involves the continual construction of knowledge, yet is not fully understood. A social constructivist perspective helped the researcher to describe the model of PL at the site school, to explore the change process, and to investigate the attributes of middle school teachers engaging in PL. A social constructivist approach allowed the researcher to develop, or construct, ideas regarding the transformation to PL, based on the perspectives of teachers (Creswell, 2003).

Synthesis of Research Findings

The literature review revealed three main ideas about transformation: (a) transformation is an integral part of lasting change (Goldsworthy et al., 2013; Mezirow, 2000), (b) teacher support and buy-in are components of the transformation process in schools (Margolis & Nagel, 2006; Nary, 2014), and (c) supportive leaders can assist teachers with the transformation process (Bosso, 2014). Additionally, two ideas emerged regarding personalized learning: (a) researchers

have identified attributes learners should develop for life-long learning (Deakin Crick et al., 2004; Sungur & Tekkaya, 2006), and (b) the field of education lacks clarification regarding how the roles of teachers support the development of those skills in PL classrooms (Garrett, 2008; Pane et al., 2015; U.S. DOE, 2014). Teacher training is important to the implementation of PL (Karmeshu et al., 2012), but the roles of teachers have not been fully developed. The concepts found in the literature review justify further inquiry into teachers' perceptions regarding the transformation from a traditional model of teaching to a PL model.

Transformation. As the classroom model changes from rows and desks to household furniture, as the focus shifts from right-and-wrong answers toward growth, as students become learners and teachers become facilitators, transformation takes place. This transformation has the potential to fail if the individuals engaging in the change do not understand why the change is happening or what the change might look like (Fullan, 2001, 2011; Schmuck et al., 2012). Fullan (2001) warned the less understanding educators have about a new idea, the more likely it is to fail. The personalized learning model is not "rubber-stamped," raising many questions about implementation. A better understanding of PL may be instrumental in supporting the transformation in classrooms.

Teacher buy-in. Teachers connect administrators to classrooms, clarifying the reality of the day-to-day interaction. As instrumental components of transformation in schools, teachers must accept and understand change, confirm the rationale behind it, and learn how to implement new ideas (Nary, 2014). The implementations of PL have varied, causing confusion over the nature and implementation of PL (Garrett, 2008; Pane et al., 2015; U.S. DOE, 2014). The components evident in PL can provide the vision for teachers to develop a clearer understanding

of how to implement the model in the classroom; however, it is also important to clarify teachers' role as the components are introduced.

Support of leaders. Mezirow (1991) stated, "Culture can encourage or discourage transformative thought" (p. 3). Along with teachers, leaders are often instrumental in creating the culture of a school. Hallowell (2011) noted people generally performed at their best when they felt supported, happy, and confident in their work. Leaders can both lead and learn in order to support the transformation process (Fullan, 2001). As teachers realize their roles in PL, leaders can support, learn, and facilitate the transformation process.

Learner attributes in PL. Learners in a PL environment could benefit from PL attributes previously described. As mentioned, Deakin Crick et al. (2004) found seven characteristics that support lifelong learning, including growth-orientation, meaning-making ability, critical curiosity, resilience, creativity, learning-relationship orientation, and strategic awareness. Sungur and Tekkaya (2006) found learners in PL classrooms possessed intrinsic goal orientation, task value, elaboration learning strategies, critical thinking, metacognitive self-regulation, effort regulation, and peer learning. School leaders seeking to develop students' skills of creativity, self-regulation, and collaboration are preparing learners for the 21st-century workforce (Wagner, 2012). If learners are expected to develop these skills, it is important for teachers to understand how to help learners cultivate them.

Roles of teachers in PL. Personalized learning is gaining attention in the United States (Zmuda et al., 2014) as researchers continue to study the model (Bill & Melinda Gates Foundation, 2014; Cavanagh, 2014; Halverson et al., 2015). Various studies have indicated components of PL classrooms, attributes learners should have in student-centered learning, and the effectiveness of PL (Deakin Crick et al., 2004, Garrett, 2008; Pane et al., 2015; U.S. DOE,

2014); however, a lack of information remains regarding the roles of teachers in the transformation. Educators have seen many fads come and go. Ensuring the PL model is truly the 21st-century model for learning and does not become just another fad requires conducting thorough research about PL implementation. In the current study, the researcher recognized that change tends to last longer when it is understood (Fullan, 2011); yet a lack of information has hindered understanding of teachers' transition from traditional model classrooms to PL models (Jaros & Deakin Crick, 2015). Teacher training is an integral component of implementing PL (Karmeshu et al., 2012); therefore, teachers' roles should be investigated.

Critique of Previous Research

The transition from a traditional classroom to a PL classroom requires implementing major, lasting changes, resulting in a transformation. The review of the literature showed that previous researchers have recognized transformation as a lasting change, rather than a short-term change (Goldsworthy et al., 2013; Mezirow, 1991). As schools evolve from a traditional model of education to a PL model, teachers, along with supportive leaders, are instrumental in creating change that lasts (Margolis & Nagel, 2006; Nary, 2014).

In order to facilitate transformation, it is important to understand tactics that have worked for others in similar situations (Fullan, 2011). The goals and roles of individuals involved in the transformation need to be explicitly defined (Schmuck et al., 2012). Although the attributes of lifelong learning (Deakin Crick et al., 2004; Sungur & Tekkaya, 2006) and the benefits of engaging in PL have been studied (U.S. DOE, 2014), a lack of information remains regarding the nature of the transition process and the roles of educators within the transformation to PL. Administrators and teachers could benefit from understanding the experiences of educators who

have transitioned from a traditional teaching model to a personalized learning model of teaching. Thus, an investigation into the roles of teachers throughout the transformation was warranted.

Summary

This literature review focused on the idea that changes in the U.S. workforce require an educational transformation. The transformation should prepare students for a workforce that encourages out-of-the-box thinking, creativity, innovation, and self-motivation (Zmuda et al., 2014). Personalized learning (PL) was one model noted to cultivate the creativity and innovation sought by much of the current workforce. PL was recognized as a model that developed student skills not necessarily fostered in the traditional model of teaching.

The purpose of this literature review was to investigate transformational change in schools produced by the personalized learning classroom model. From the literature, the researcher recognized the possible benefit of investigating teachers' perceptions as they transformed from a traditional model of teaching to a personalized learning model. The findings of this study may help inform members of the educational community about the transformation to personalized learning. The qualitative design allowed the researcher to include the participants' perceptions, using their words, to provide descriptions of their experiences.

Chapter 3 outlines the research methodology and design, including the purpose, design, data collection, and data analysis procedures. The chapter also includes a discussion of the study's limitations, credibility, and ethical issues.

Chapter 3: Methodology

As the workforce changes from an industrial-age model to one that engages in innovation and creativity, some classrooms are following suit (Deakin Crick, 2015; Zmuda et al., 2015. Educators are applying personalized learning to develop the skills students need in a workforce that embraces self-regulation, a growth mindset, creativity, and collaboration (Deakin Crick et al., 2004). Through this process, the role of the teacher is changing (Deakin Crick, 2015; Zmuda et al., 2014); however, a lack of research exists about the how the role of the teacher changes and what teachers experience as the transition occurs. In this study, the researcher explored teachers' experiences of the transition from a traditional model of teaching to a personalized learning model (Brown, 2002; Jaros & Deakin Crick, 2012).

In order to investigate the transformation of teachers to personalized learning, the researcher first developed steps to follow. Research is a scientific process and therefore requires a plan, or methodology, in order to approach a problem. The methodology provides a foundation for the steps a researcher employs as data are collected and analyzed (Creswell, 2013). In this chapter, each component of the research methodology and design are described to illuminate the research process and justify the chosen methods. The study school and participants are described in order to provide a thorough explanation of the individuals who contributed to the study and to ensure all participants were treated with respect, beneficence, and justice (LaMorte, 2016).

In Chapter 3, the researcher identifies the research questions, the purpose, and design of the study and explains the reasoning behind the chosen method of a qualitative case study. The methodology and design sections include discussions of the research population, instrumentation, and data collection procedures. Finally, the researcher identifies data analysis procedures, limitations, validation techniques, expected findings, and ethical issues of the study. Each of the

components in this chapter contributes to the framework for the study and supports the investigation into middle school teachers' experiences of changes in their instructional roles as their school transitioned from a traditional model to a personalized learning model.

Research Questions

In this study, the researcher engaged in qualitative research in order to gain a deep understanding of a phenomenon (Creswell, 2013; Marshall & Rossman, 2011; Schwandt, 2007). Insight and perspective regarding the research questions emerged from the data gathered from the participants at the study school. The research questions related to the purpose of the study and provided a framework for the final description of the study (Bloomberg & Volpe, 2012). To allow in-depth research to explore teachers' experiences, the case study focused on questions that began with the term *how* (Creswell, 2003, 2013; Yin, 2014). This study addressed the following questions:

1. How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?
2. How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model?
3. How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?

Purpose and Design of the Study

The purpose of this qualitative study was to collect the perceptions of four rural middle school teachers who transitioned from a traditional model of teaching to a personalized learning (PL) model. This study was important because the U.S. workforce has been evolving from a traditional factory-based model to a model that encourages creativity and innovation. Schools

throughout the United States, including the study school (a middle school in the Midwest) have begun to make changes to meet the needs of the changing workforce more effectively (Jaros & Deakin Crick, 2012; Senge et al., 2000; Zmuda et al., 2014). Teachers are integral components of the classroom; therefore, it was relevant to seek to understand the perspectives of one group of teachers as they transitioned from a traditional classroom model to a PL model. A team of four middle school teachers who were engaged in the change process participated in this study.

Research studies require a foundation (the research design) to ensure research questions connect with conclusions (Yin, 2014). This study used a qualitative research design as the methodology to gain in-depth insight into the changes that occurred in teachers' roles as they transitioned from a traditional classroom model to a PL model. A single-case, instrumental, descriptive case-study design was the framework for this qualitative study. The findings of this case study show the lived experiences of teachers as they engaged in the transition from a traditional model of teaching and learning to a personalized learning model.

Social Constructivism

Employing a social constructivist paradigm allowed the researcher to develop meaning from the findings of the study. Social constructivism involves investigating a phenomenon to develop an understanding of how participants construct meaning (Creswell, 2003; Bloomberg & Volpe, 2012; Omrod, 2008). Bloomberg and Volpe (2012) recognized qualitative research as "grounded in an essentially constructivist philosophical position, in the sense that it is concerned with how the complexities of the sociocultural world are experienced, interpreted, and understood in a particular context and at a particular point in time" (p. 118). In this case, social constructivism was used to understand the transformation to personalized learning from the perspectives of four teachers in a middle school PL classroom. Positivists consider the

relationships between variables; in contrast, constructivists seek an understanding of holistic phenomena (Cupchik, 2001). Teachers encounter multiple elements in transitioning to personalized learning, including the nature of change, the learners' experiences, the teachers' experiences, and the teachers' roles—thus, in this study, social constructivism helped the researcher develop an overall meaning for the layers. Applying social constructivism allowed the researcher to understand the lived experiences of the participants by interacting with participants in their environment (Creswell, 2003). Gathering the lived experiences of four teachers in a PL classroom produced perspectives that could be developed into multiple meanings (Bloomberg & Volpe, 2012). The meanings in this study were constructed through data collected from a document review, individual interviews, and a focus group and corroborated with personal experiences collected from individual interviews for triangulation. Each method of data collection provided information used to develop meaning regarding transitioning to personalized learning.

Guba (1990) stated,

> Methodologically, constructivism demands that inquiry be moved out of the laboratory and into natural contexts, where organizational processes create naturally occurring experiments, dictates that methods designed to capture realities holistically, to discern meaning implicit in human activity, and to be congenial to the human-as-instrument be employed. (p. 78)

All teachers develop unique perceptions of the ways in which their roles as teachers change as they move from a traditional model to a PL model. Constructivism provided a lens through which to develop meaning from the different perspectives that emerged from the data (Creswell, 2003). In this study, four teachers provided perspectives as their classrooms moved from

traditional to personalized learning. The researcher analyzed the participants' perspectives for themes to understand the meaning of middle school teachers' roles in PL classrooms.

Qualitative Research Method

Classroom interactions in personalized learning are grounded in relationships, connections, and meanings, constituting more than simply numerical data. "Improving the quality of relationships among and between adults and young people should stand at the center of school improvement and instructional reform" (Breulin et al., 2005, p. 24). In order to investigate the depth of teachers' experiences in PL classrooms, the researcher employed a qualitative methodology. Qualitative research has multiple characteristics. For example, the researcher is the main data collection instrument; multiple sources of data are collected in a setting natural to participants; complex reasoning is required, the purpose of which is to discover participants' meanings; the research design is emergent; disclosure of the researcher's background is essential; and a holistic picture of the data is created (Creswell, 2013). The richness of classroom events, especially viewed in the context of a model that is not yet grounded in extensive research, can best be understood through qualitative data (Creswell, 2003). Qualitative research is complex in nature (Bloomberg & Volpe, 2012; Creswell, 2013), as are classrooms. Developing meaning about the changing roles of teachers was best described through qualitative research. Thus, a qualitative approach was well suited to investigate the transition from traditional to personalized learning among a team of four middle school teachers.

Personalized learning classrooms can be difficult to comprehend; therefore, a thick description could provide a holistic view of the phenomenon by presenting a verbal image of the lived experiences of a team of four middle school teachers as they engaged in the change process (Bloomberg & Volpe, 2012). Quantitative research could provide insight focused on what is

absolute, relying heavily on numerically measured data. In contrast, qualitative research produces an inside view of events, actions, and relationships to enhance understanding of the connections that result (Bloomberg & Volpe, 2012; Glesne, 2011). This study depended heavily on the narrative data provided by participants (Guba, 1990). Qualitative research allowed the researcher to engage with the phenomenon, interpret the data, and create understanding (Marshall & Rossman, 2011).

Case-study design. A case study has been defined as "a qualitative approach in which the investigator explores a real-life, contemporary bounded system (a case) or multiple bounded systems (cases) over time, through detailed, in-depth data collection" (Creswell, 2013, p. 97). Case studies provide a perspective of what is happening within a setting with a descriptive picture of the phenomenon (Bernard & Ryan, 2010; Marshall & Rossman, 2011). The case-study genre of research focuses on a small group, in this case, four middle school teachers, in order to provide a more detailed view of the phenomenon (Gibson & Brown, 2009). Case-study research generates copious amounts of descriptive data, which are interpreted for meaning (Bernard & Ryan, 2010).

In this study, the teachers' role in a personalized learning model was the case, or unit of analysis. Classrooms are communities, each one unique, with different personalities, perspectives, models, and interactions. This case-study research focused on a single-case descriptive design involving gathering data from four teachers in one classroom. Although Yin (2009) recommended the use of multiple cases, personalized learning models tend to vary widely in implementation (Zmuda et al., 2015); therefore, the researcher chose to investigate one case in great depth. Creswell (2013) stated, "Case studies often end with conclusions formed by the researcher about the overall meaning derived from the case(s)" (p. 99). In this instance, a single-

case descriptive case study was expected to provide a deep understanding of how teachers' roles changed as they implemented a PL model (Yin, 2009).

A boundary provides parameters for the elements included in a study (Creswell, 2013). In this study, the boundary of middle school teachers was identified as a means of further distinguishing the case (Yin, 2009). Although at the time of this study, other classrooms in the district were engaging in a PL model, the team of middle school teachers was the first to begin implementation. The time the team had spent with PL was longer, compared to the time spent by other teams in the district; therefore, the perspectives of these teachers provided richer data. In addition, creating a boundary for the scope of the study ensured the researcher was focused on a particular area, rather than investigating too broadly. In sum, using a qualitative single-case descriptive case study allowed the researcher to develop meaning based on the experiences of teachers engaged in the transformation from a traditional model of teaching to a personalized learning model.

Research Population and Sampling Method

A researcher determines who is involved and where a study will take place in order to investigate a research question (Creswell, 2013; Marshall & Rossman, 2011). The researcher's choices of research site and participants create a foundation for the study (Marshall & Rossman, 2011). Although many schools have engaged in the transition from a traditional model to a personalized learning model of teaching, to date, no universal criteria exist to determine the elements PL models must contain (Cavanough, 2014). In order to investigate the phenomenon deeply, as is typical in qualitative research, the researcher determined the most appropriate approach was to conduct purposeful sampling at a site at which data regarding the phenomenon could be collected (Marshall & Rossman, 2011). Experts have warned that purposeful sampling

could leave gaps in information (Creswell, 2013; Marshall & Rossman, 2011); however, the researcher determined the insider view gained by purposefully selecting a sample would be a benefit to understanding how personalized learning was approached at the study site school.

This study focused on a site located in a rural community in the Midwestern United States. The district consisted of three schools: an elementary school (K–2), a middle school (grades 3–8), and a high school (grades 9–12). At the time of this study, the middle school had approximately 500 students, 10% of which qualified as having disabilities (WISEdash, 2016). Approximately 32% of the students were economically disadvantaged (WISEdash, 2016). The school had nine English language learner (ELL) students; overall, 91% of the students were Caucasian (WISEdash, 2016). The study school contained three to four teachers per grade level and an average of 22 students per class.

Personalized learning started in the study school from the vision of a middle school teacher and the school administrator. The study school began the journey to implement a personalized learning model in 2014 by piloting a personalized learning model across a middle school grade level in all four classrooms. The teachers invited to participate in this study were beginning their third school year of transitioning from the traditional model to the PL model of teaching. The fact that this team of middle school teachers already had two years of experience in transitioning from a traditional model to a personalized learning model was the impetus for investigating how the teachers' roles changed during the process. Based on this experience, the researcher invited the four middle school teachers to participate in the study (see Appendix A). All four participants accepted the invitations; therefore, four middle school teachers comprised the sample from which data were gathered for this case study. The teachers, one male and three females, had an average of 23 years of traditional model teaching experience and had worked as

a middle school team for three years. Even after the sample for this case study was selected, the researcher was aware that the sample had the potential to change during the process of the investigation (Creswell, 2013). The teachers could decline the invitation or exit the study at any time. In addition, the researcher had no supervisory role or stake in the teachers' work.

Sources of Data

In qualitative research, the researcher is the main instrument (Creswell, 2003; Lincoln & Guba, 1985; Marshall & Rossman, 2011). This role requires strong values and ethics to develop trust with participants (Creswell, 2003; Marshall & Rossman, 2011). As the primary instrument, the researcher must set beliefs and assumptions aside in order to allow the data to reveal the phenomenon (Bloomberg & Volpe, 2012; Yin, 2014). In addition, the case-study researcher must continue to ask questions throughout the study, prepare for change, listen intently to participants, and understand the focus of the study (Yin, 2014). In order to foster a trusting relationship with participants, as recommended, the researcher conducted a meeting prior to the study to explain the details of the study (Creswell, 2013).

As the main research instrument, the researcher engaged in reflexivity—that is, the process of considering one's worldview (Creswell, 2013). Reflexivity is a process in which researchers reflect on their backgrounds and consider how their backgrounds might influence the study (Gibson & Brown, 2009). The researcher was aware that bias, values, and worldview needed to be set aside in order for themes to emerge in this qualitative study.

Instrument Reliability and Validity

A strong foundation is necessary for a case study to be valid (Yin, 2014). "Case study evidence may come from six sources: documents, archival records, interviews, direct observation, participant-observation, and physical artifacts" (Yin, 2014, p. 102). Data collection

in this case study included document review, focus group interviews, and individual interviews. Triangulation of different data sources of information was employed to establish the accuracy and credibility of the findings (Bloomberg & Volpe, 2012; Creswell, 2013; Gibson & Brown, 2010; Yin, 2014). Each form of data collection was cross-referenced with the others in order to allow themes to emerge.

Data Collection

Data collection in qualitative studies is designed to capture a holistic picture of the phenomenon. "When we reduce people's thoughts, behaviors, emotions, artifacts, and environments to sounds, words, or pictures, the result is qualitative data" (Bernard & Ryan, 2010, p. 5). The researcher considered the four goals of qualitative research—exploration, description, comparison, and testing models (Bernard & Ryan, 2010)—to determine suitable data collection methods. To triangulate data, the researcher applied three methods of data collection: (a) document review, (b) semiformal interviews, and (c) a focus group. Participants received the interview questions prior to the interview sessions, for both the individual interviews and the focus group, to allow participants time to consider answers (Gibson & Brown, 2009).

The recording of data is imperative to ensuring validity in a study (Bernard & Ryan, 2010); therefore, when collecting data, the researcher attempted to collect as much data as possible without losing information. The researcher engaged in one interview practice session prior to conducting the research interviews to reveal issues that might be of concern. To ensure data validity, with permission from participants, individual interviews and the focus group were video- and audio-recorded on a password-protected iPad using Rev Voice Recorder. Pseudonyms were used during the interviews (i.e., Participant A, Participant B, Participant C, and Participant D), as well as in data entry and analysis, to ensure the anonymity of participants.

Recordings of the interviews were transcribed using Rev Voice Recorder and transferred to a password-protected computer and a password-protected external hard drive. The researcher took field notes as participants were interviewed as a means to collect holistic data (Creswell, 2013; Bernard & Ryan, 2010). In accordance with university protocol, three years after approval of the dissertation, all information pertaining to notes, individual interviews, and the focus group will be destroyed on the iPad, password-protected computer, and hard drive.

Document Review

Document review comprised the first method of data collection. The researcher used caution in analyzing documentation data, because the data were created prior to the study; in addition, there was a potential to lose information in the analysis process (Gibson & Brown, 2009). In this study, the four-person team was engaged in the transition from a traditional model to a personalized learning model of teaching for over two years. In reviewing information written by the teachers throughout the change from traditional to personalized learning, the researcher collected data written in the past. Thus, document review added possibly forgotten historical data to the case study. The researcher collected documents the four teachers provided from courses on personalized learning and reflections from the change process. Additional artifacts included presentations created by the teachers, the video the school district created to promote personalized learning, and local newspaper articles on PL. The historical information provided background information prior to collecting interview data (Yin, 2014).

Individual Interviews

Individual semistructured interviews were conducted in order to ensure individual voices were recorded in the data collection process (Marshall & Rossman, 2011). Face-to-face interviews provided a method of documenting holistic data (Gibson & Brown, 2010).

Semistructured interviews allowed the researcher to present prepared questions but still have flexibility in wording and order of questions (Gibson & Brown, 2010). Each of the four middle school teachers was interviewed individually face-to-face for approximately 45 minutes. With permission, the interviews were video- and audio-recorded on an iPad, then transcribed via Rev Voice Recorder. The questions asked of participants were as follows:

1. How would you describe your role in a traditional classroom?
2. What did you do to prepare for the change to personalized learning?
3. How did the leaders in your district support you in the change to personalized learning?
4. How would you describe your role in a personalized learning classroom?

Two levels of interviewing are necessary when conducting individual interviews; level 1 involves connecting on a personal level with participants, and level 2 involves collecting data for research (Yin, 2014). The researcher was cognizant of these levels as interviews occurred; the researcher used a semistructured interview to build relationships and foster flexibility (Gibson & Brown, 2010). Further, after the interviews were complete, the researcher allowed each participant to examine his or her interview data (member checking) in order to ensure validity of the data (Creswell, 2003). Participants received transcripts via hard copy to document any concerns and confirm their contributions prior to coding data.

Focus Groups

A face-to-face focus group, 45 minutes in length, occurred two weeks after the individual interviews in this case study. The focus group session provided a big picture of the research (Gibson & Brown, 2009). In the session, the researcher met with the four middle school teachers at an offsite location. The researcher followed a semistructured interview process, wherein

questions were determined ahead of time, but the order and exact wording were flexible (Gibson & Brown, 2010). A relaxed environment allowed the members of the focus group to interact naturally and provided the researcher with copious amounts of information (Marshall & Rossman, 2011). With permission from participants, the focus group session was video- and audio-recorded on an iPad and transcribed using Rev Voice Recorder. To ensure credibility of the study, data collected in the session were shared with participants for approval (Bloomberg & Volpe, 2012).

Because of the nature of focus groups, the researcher could not guarantee absolute anonymity or confidentiality; however, pseudonyms were used to protect the participants' identities. Focus groups can be difficult to document, because of the influx of information recorded; however, the peer-review process aided in ensuring data were recorded accurately (Creswell, 2003). The researcher provided hard copies of the transcripts to participants in a one-on-one meeting to ensure participants were comfortable with the information they had shared. Participants provided documentation of their agreement or disagreement with the transcripts by noting any areas of concern, signing the transcripts, and returning them to the researcher. This process occurred prior to the coding of data.

Data Analysis Procedures

In order to investigate teachers' roles in a personalized learning classroom, the researcher collected and analyzed data collected from four teachers. "Qualitative data analysis is the process of bringing order, structure, and meaning to the masses of data collected" (Bloomberg & Volpe, 2012, p. 135). Analyzing qualitative data included organizing and categorizing data, identifying themes, and coding (Bloomberg & Volpe, 2012). "Broadly speaking, qualitative data

analysis is the researcher's attempt to summarize all the collected data in a dependable and accurate manner" (Bloomberg & Volpe, 2012, p. 135).

As data were collected, the researcher continued to gather and analyze data. Multiple steps were taken in the data analysis process. The researcher printed document review artifacts, including reflections, coursework, presentations, and local newspaper articles. First, the researcher reviewed the documents for overall understanding and then reviewed them again while highlighting information pertaining to the research questions. The researcher took notes on keywords and coded the data. The researcher then reviewed the district video on personalized learning. In the same fashion, notes were taken on the video, and key ideas were highlighted.

The researcher used Rev Voice Recorder to record and transcribe the individual interviews and focus group. After each interview and after the focus group, data were transcribed immediately in order to ensure accuracy and understanding (Creswell, 2013). Each transcript from the individual interviews and focus group was printed, and the researcher reviewed the transcriptions with the recordings to check for accuracy. In reviewing the transcriptions with the audio recordings, the researcher developed a deep understanding for the responses of the participants (Bloomberg & Volpe, 2012). The researcher highlighted key ideas on the transcripts and wrote notes in the margins. From the data, codes (i.e., descriptive tags aligned with the research questions) were assigned (Gibson & Brown, 2009). This step was revisited multiple times to ensure accuracy. Codes were combined into themes, or commonalities, in order to move forward with interpretation of the data (Creswell, 2013). After the data were thoroughly coded, the researcher interpreted the meaning of the data, sought alternative understandings, and wrote the findings (Marshall & Rossman 2011). Any

miscellaneous information was set to the side and reevaluated throughout the analysis process (Bloomberg & Volpe, 2012).

Limitations of the Research Design

The limitations of this study formed the confines of the study and had the potential to weaken the study (Bloomberg & Volpe, 2012; Creswell, 2003; Marshall & Rossman, 2011). Researchers acknowledge the limitations of their studies to ensure the studies are reliable and valid. In this study, the researcher recognized four limitations: (a) the sample size of four individuals was small, (b) the research focused on one school district, (c) participants worked in the same building as did the researcher, and (d) participants' lived experiences encompassed one moment in time. Additionally, the researcher was connected to the site district, creating the potential for bias. This study focused on only a small portion of the population engaged in transitioning from traditional to personalized learning. Thus, the number of participants, only one district, and the minimal time spent on data collection provided a small amount of information, compared to the information available.

Although there were limitations to the study, the researcher recognized benefits to each concern as well. The researcher engaged in purposeful sampling, choosing the participants in order to gain rich data and analyses to illuminate the phenomenon. The small scope of the study and the researcher's connection to the district allowed the researcher to engage in an intimate, in-depth examination of the transition from a traditional to a personalized learning model.

Validation

In order to ensure reader confidence in the findings of this study, validation, credibility, and dependability were carefully considered. Creswell (2013) described validation as "the account made through extensive time spent in the field, the detailed thick description, and the

closeness of the researcher to participants in the study" (p. 250). The researcher was immersed in a personalized learning atmosphere; the qualitative approach generated thick descriptions representative of the personalized learning environment. Throughout the collection of data, the researcher addressed validity in six ways: (a) paying attention to conflicting information; (b) including negative information; (c) considering various explanations for phenomenon and examining all concepts, even when one did not seem to fit; (d) triangulating multiple data sources; (e) denoting researcher bias; (f) conducting member checking; and (g) offering thick description (Bernard & Ryan, 2010; Creswell, 2013; Marshall & Rossman, 2011). Validating the study was important for both researcher and reader.

Credibility

Throughout this study, the researcher addressed the issue of credibility, sometimes referred to as *reliability* (Gibson & Brown, 2009) when investigating the lived experiences of teachers in personalized learning classrooms. Credibility refers to "whether the participants' perceptions match up with the researcher's portrayal of them" (Bloomberg & Volpe, 2012, p. 112). The researcher considered credibility extremely important in gaining the trust of readers, because the study focused on making meaning of teacher's roles in a personalized learning environment. Credibility was addressed in six ways: (a) clarifying and monitoring researcher bias, (b) providing details of the research process, (c) triangulating multiple data sources, (d) presenting contrary data, (e) conducting member checking, and (f) employing peer debriefing (Bloomberg & Volpe, 2012; Gibson & Brown, 2009). Each of the practices used to address credibility provided support for the study's findings.

Expected Findings

Large amounts of data were gathered throughout this study to investigate the lived experiences of four personalized learning teachers. The researcher analyzed the data to understand how the roles of teachers changed as they transitioned from traditional learning to personalized learning. The researcher was careful not to suggest any expected findings, because the data and analysis were needed in order to determine the findings. The study was intended to answer three questions: (a) How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model? (b) How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model? and (c) How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?

Ethical Issues

Ethical issues must be carefully considered in every step of a research study. As this study was developed, the researcher obtained site (see Appendix B) and participant approval, provided explicit clarity regarding the study purpose and plan, and engaged honestly with participants and the data (Creswell, 2013). The American Psychological Association (APA; 2010) listed the following ethical principles researchers must follow: beneficence and nonmaleficence, fidelity and responsibility, integrity, justice, and respect. The Internal Review Board (IRB) required all participants be treated with respect, beneficence, and justice (LaMorte, 2016). The principles acknowledged by the APA and the IRB were addressed throughout this study.

Conflict of Interest Assessment

The researcher acknowledged that having a connection to the study site school district and having professional relationships with participants could have represented conflicts of interest. In order to address possible conflicts, the researcher met with the participants to disclose each facet of the study, and sign the informed consent form provided to each study participant (see Appendix C). Participants were reminded they were able to leave the study at any time, and were encouraged to contact the researcher with concerns at any time during the study. Participants also reviewed the transcripts from the individual interviews and the focus group, and reviewed the final dissertation prior to submission.

Researcher's Position

At the time of this study, the researcher had been employed at the school district associated with the study for over two years. As the district implemented personalized learning, the researcher played an integral role in the process. The researcher was on the PL design team and copiloted a seventh-grade PL program. Although the experiences of the researcher provided a deep understanding of PL, the researcher had more to learn, along with many unanswered questions. Throughout this study, the researcher used the data provided from the participants' perspectives to discern meaning for teachers' roles in PL.

Ethical Practices

Trust is gained through honesty and openness, both imperative to this study. The University of Concordia Portland's Internal Review Board approved this study and ensured the researcher engaged in ethical practices (see Appendix D). The researcher provided an informed consent for each study participant, detailing the study, autonomy, and possible risks involved. Participants were not put in a position of harm or wrongdoing in any portion of this study and

were provided full disclosure of the study practices. Additionally, participants had the ability to withdraw from the study at any time.

Summary

Personalized learning (PL) has been recognized as a classroom model that supports skills for a 21st-century workforce; yet, to date, limited research has been available regarding the transformation to PL. Through a qualitative single-case descriptive case study, the researcher investigated the transformation from a traditional model of learning to a PL model. Engaging in the scientific process requires preplanning, careful consideration, and thorough documentation. Through qualitative methodology, the researcher investigated three research questions.

The researcher requested permission from the middle school administrator of a rural school district that was engaged in the transformation to PL. With permission granted, four middle school teachers beginning their third year of implementation were invited to participate in the study. All four participants accepted the invitation and provided informed consent as evidence of their willingness to contribute to the study. Participants were able to leave the study at any time; however, each participant chose to contribute to each form of data collection.

Data were first gathered from a document review, which included reflections, coursework, presentations, newspaper articles, and the district video on personalized learning. Participants then engaged in individual interviews and a focus group. The researcher used member checking to enhance credibility. Data were analyzed using open coding, and themes were developed. The data were triangulated to ensure validity. The data analysis resulted in deeper understanding of the change from traditional to personalized learning. Finally, ethical procedures were followed in all aspects of this research study. Data collected for this qualitative study are presented in Chapter 4.

Chapter 4: Data Analysis And Results

This qualitative descriptive case study focused on how middle school teachers experienced change as their school transitioned from a traditional model to a personalized learning (PL) model. This study addressed three research questions:

1. How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?
2. How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model?
3. How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?

Data for this research were gathered from four participants and included three forms of collection. The first form of data collection was a document review, wherein reflective documents pertinent to the transformation process were obtained from participants. Documents included reflections, coursework, presentations, newspaper articles, and the district video on personalized learning. Information retrieved in the document review was manually analyzed and coded, which developed into three themes: (a) laying the groundwork, (b) "more work, but different, more meaningful work," and (c) data-infused learning.

The researcher acquired the second set of data through individual interviews with each of the four participants. The interviews were conducted in the participants' classrooms and were approximately 45 minutes in length. Interviews were recorded and transcribed using Rev Voice Recorder. The researcher manually coded the data from participant responses. Three themes emerged from the interviews: (a) all around support, (b) we don't know all of the answers, and (c) kids come first.

The researcher collected the third set of data in a focus group session with all four participants. The session was conducted in a space outside the school building and was approximately one hour and 15 minutes in length. Responses were recorded and transcribed using Rev Voice Recorder. The researcher manually coded the data, and three themes emerged: (a) supporting each other, (b) prioritize, and (c) students as experts.

After the coding and analysis of data, the researcher implemented triangulation to determine credibility of findings. The researcher considered each of the nine themes that emerged from data collection. Similar themes were merged, and two main themes emerged from triangulation: (a) participants learned through the transformation process, and (b) students were the focus of the transformation. This chapter contains the findings from this study.

Descriptive Data

The researcher collected the data for this study at a middle school in a rural Midwestern United States school district. Classrooms at the study site had an average of 22 students per teacher. Four participants provided data through document review, individual interviews, and a focus group session. During data collection, the team of teachers was beginning its third year of implementing personalized learning in the teachers' classrooms. Participants (one male and three female) had an average of 23 years teaching experience in traditional classrooms prior to engaging in the transformation to personalized learning.

Data Analysis Procedures

Prior to data collection, the researcher invited four teachers to participate in the study. A meeting was held to invite each of the teachers to participate. Every component of the study was explained in detail to the teachers, and each teacher was invited to participate. All four teachers accepted the invitation by signing and returning the consent form provided by the researcher.

The researcher did not have any supervisory role over participants, and each participant willingly agreed to contribute to every aspect of the study. Participants were reminded that they were able to withdraw from the study at any time. Data for this study were collected through document review, individual interviews, and a focus group session. The researcher engaged in a mock interview to gauge the amount of time needed for individual interviews and test recording devices.

Document Review

The researcher obtained documents representative of the four participants for review. Information was gathered from reflections written in the first and second year of PL, presentations, coursework, local newspaper articles, and the district video on the transformation to personalized learning. Reflections and coursework were products of assignments the participants had engaged in when enrolled in courses for personalized learning. Participant A and Participant C created presentations for informational seminars regarding personalized learning. Several local newspaper articles and the district video featured the transformation to PL; these data sources were included in the document review.

The researcher examined each document to gain a deeper understanding of the information provided. Manual coding was performed on each of the documents during the second reading. Data were coded by listing keywords from each document and combining similar ideas into codes. The researcher consolidated data into codes and documented the frequency of each code. The researcher noted questions and insights regarding the documents. Three themes were developed from the final codes obtained from document review data: (a) laying the groundwork, (b) "more work, but different, more meaningful work," and (c) data-infused learning.

Theme 1: Laying the Groundwork

The first theme, *laying the groundwork*, developed from participants' recollections of the planning and preparation that occurred during the first year of personalized learning implementation. Participant A recalled, "Year one of PL was a challenge." In this case, Participant A used the word *challenge* positively to describe the tasks that needed to be accomplished and the time commitment required for making the transformation. Participants reflected on aligning curricula and standards, collaboration, and the transformation of the learning environment.

Each participant recalled the task of aligning the curriculum and standards to allow for student-led learning. Participant C stated, "I am learning more about the rigor concept that is infused within the Common Core State Standards and how important it is [that] it challenge students by providing tasks that are across the matrix." According to Participant D, "Competency-based learning fits perfectly under the personalized learning umbrella because it allows learners to progress at their own pace and only when things are mastered." Participant B said, "I was concerned how effective my learners would be in performance of academic standards." Participant A noted the importance of "making sure standards and curriculum were still being taught."

The term *collaboration* appeared 11 times in the document review—each participant mentioned it at least twice. Participants reflected on collaboration, whether with peers, administration, or parents and students, as a task instrumental in transforming to personalized learning. Participant A described the benefits of collaborating on a daily basis: "We had a wonderful schedule that allowed us to meet at the start of every day." Participant A and Participant C recognized "teaching each other" as a collaboration tool used to develop new

classroom practices. Participant A added, "We took the spring and summer of 2014 to meet, talk, plan, and breathe together." Collaboration was also noted as part of the professional development in which the team participated. Participant C stated, "My team and I have made site visits to schools that use the personalized learning format and met many times for research and planning over the summer months." Participant B reflected on observing a PL classroom in another district in which "students engaged in their learning." Participant A found benefit in collaborating with PL teachers at different schools: "We listened to teachers that were in the PL trenches."

In addition, participants acknowledged administrative collaboration and support. Participant C wrote,

> I feel with our district encouraging our fifth-grade team to move toward personalized learning that we would benefit from using these concepts to guide us through this change in philosophy and teaching delivery. . . . Administration has given us full support to develop instruction to match readiness and involve "voice and choice" opportunities to increase student engagement.

Similarly, Participant A noted, "I was supported 100% and encouraged to go for it."

Participants discussed the transformation of the learning environment, from rows of desks to couches, tables, and chairs, as another facet of change during the first year. Participant A listed the changes as "comfortable seating options, lighting options, larger learning spaces," implemented for the purpose of encouraging student collaboration. Participant B wrote, "My room has gone through quite the change since January." Participant D described the classroom:

> In the larger classroom area, there are high tables with stools, risers, and several tables for students to collaborate at. We each have a table that is conducive to working with small groups of students that may need more one-on-one instruction.

Participants engaged in multiple activities, from curriculum work, to collaboration and even transforming classrooms, as they prepared for the transformation to personalized learning.

Theme 2: "More Work, but Different, More Meaningful Work"

Participant A explained the transformation as "more work, but different, more meaningful work," a perception that developed into the second theme of the document review. This theme emerged from topics regarding the work required with student-led learning, student engagement and motivation, and the result of reinvigorated teachers. Participants described the process as "more work"; however, they also noted the excitement and rejuvenation that came with work that they perceived to be more meaningful.

The concept of student-led learning emerged during participants' attempts to define the transformation to personalized learning at the site school. Participant C affirmed, "Students should be able to learn how to gather information, be resilient, own and present their knowledge as they gain mastery and make commitments to goals and follow through with them." Although teaching these skills can be "more work," Participant D recalled, "Most of the individuals in our classrooms did better with these changes than we would have ever thought possible. They were excited about their learning again and were on task and motivated to collaborate and complete projects." Participant C explained the work required of PL teachers:

> I will conference with students on a weekly basis (about five students per day) to reflect and evaluate how their personalized learning plan is working—ask students what is going

well, not well and allow student voice to set new goals as initial ones are met or reestablish existing goals.

Although conferring with each student might be time consuming, Participant D explained, "Making our learners aware of these statements and discussing with them their progress through these will help them to understand themselves as a learner."

As PL was implemented, students were allowed to have a say and make choices in their educational endeavors, leading to engagement and motivation. According to Participant D, "These changes brought excitement, motivation, and engagement to our learners." Participant D witnessed students searching for information to develop understanding of a concept: "Often they found videos to share with the class that allowed us to actually see and learn about the event firsthand." Reflecting on the transformation of students, Participant B stated, "Giving students voice and choice is something my fifth-grade team tried this past school year. Watching students take ownership of their learning was impressive."

Participant D reflected on student engagement during presentations: "The students were very excited to share what they had learned with their classmates. Allowing them to have a voice and choice in their learning gave each student freedom and ownership, which was very rewarding and motivating for them." According to Participant D, students "were excited about their learning again and were on task and motivated to collaborate and complete projects." According to Participant C, "One of the best things a teacher can do during this process is to promote and praise the ownership the student is committing to as they move along their pathway of learning toward goals." Participant B commented, "I see that with personalized learning, I will continue to build even stronger bonds with my students as they dive into interesting topics that are important to them." Participant C said, "It is important to give students the option of

working alone or with others to enhance the learning experience." While student motivation can ease some of the work for teachers, students still must master the expected standards. Participant A stated, "For some students, this will happen more quickly, and others may take a long time."

Although participants recognized the transformation as "more work," they relayed their own excitement for the new approach to learning in the classroom, thus making the work "more meaningful." Participant D declared, "Personalized learning is the way I would like to manage my classroom in the future!" Participant C stated, "I am motivated to make a difference in the way we deliver learning to students by having students join me with their 'voices and choices' to personalize student learning." Participant A explained, "I felt like the kids were getting what they needed at their level. It changed every day; the work was different for both sides." Participant B stated, "I'm looking forward to projects that encourage learner voice and choice." Even after a year of implementation, Participant D stated, "I am excited to begin another school year of personalized learning!"

Theme 3: Data-Infused Learning

The final theme of the document review was *data-infused learning*, which described the attention to qualitative and quantitative data used in attending to student needs in a PL classroom. Participant A described the approach to data-infused learning:

> We met religiously, we had to. We planned, grouped, talked about things that were successful and things that failed that we needed to go back to the drawing board for. This was so important, and we always made it a priority every day.

Participant D explained, "This method changes from the traditional time-based ways of organizing learning to learning that can take place anytime, anyplace, anyhow, and at any pace."

According to Participant C, "Focus must be on skills and that the content is malleable and can be changed." Participant A recalled, "We thought grouping was the way—it wasn't, it was ability grouping. We looked over math homework from the night before every morning and put kids in groups: get it, sorta get it, and don't get it." Participant C recognized the need to "provide timely, relevant feedback to learners." Teachers used data to plan and replan to develop ideas to support student success.

Participants noted the techniques used to attend to the academic and emotional needs of individual students. Participant B acknowledged, "Building relationships with my students has always been important to me. I see that with personalized learning, I will continue to build even stronger bonds with my students as they dive into interesting topics that are important to them." Participant D stated, "I want to stress the fact that we are a family, and we need to show respect for all members." Participant A explained, "We started morning meetings every day with our classes to build trust, community, communication, reflections, and relationships with our students."

As a means of getting to know students, their abilities, and their aspirations, teachers provided a form (a learning style inventory) for students to describe themselves as learners. Participant C stated, "Learning style inventories have been taken by all students to indicate how they learn best—in a visual, auditory, or kinesthetic manner—so I will bring that information to conferences with the students to aid their work." Participant A explained, "Students made individual goals, both short and long term, and also assessed the skills they had as learners." According to Participant D, "This is an extremely important part of PL because learners need to examine their strengths and challenges when it comes to accessing information, engaging with content and concepts, and expressing their knowledge and understanding." Participant C stated,

"Personalized learning plans will enable teachers and students to set goals to reach mastery and achievement." The team of teachers worked to ensure every student learned at his or her own pace, no matter whether the pace was fast or slow. Participant A found "one of the components of personalized learning is learning through failure, having it be okay to fail." Participant D recognized, "Learners *learn* even when they fail at something." Participant A described what the team perceived as deep learning and "astonishing" student growth that was occurring because of the focus on "data-infused learning."

Document review provided the groundwork for understanding how personalized learning was implemented in the study site district. The three themes—laying the groundwork, "more work, but different, more meaningful work," and data-infused learning—provided a foundational starting point for this qualitative case study. Document review data produced insight into the preparation for making a change to personalized learning and the new and different work involved in the transformation. Data from the document review were also used to triangulate data after individual interview data and focus group data were collected and analyzed.

Individual Interviews

After the document review data analysis, individual interviews of approximately 45 minutes in length were completed with each of the four participants. Each interview was video-recorded and audio-recorded using Rev Voice Recorder. Following the interviews, each recording was submitted to Rev Voice Recorder for transcription. The researcher reviewed the transcriptions with the audio recordings to check for accuracy. Participants approved their transcription without changes prior to data analysis. Table 1 indicates the alignment of interview questions with research questions.

After each interview was conducted, transcribed, and checked for accuracy, the researcher began manually coding documents. Data were coded by listing keywords from each document and combining similar ideas into codes. The researcher documented the frequency of each code and consolidated data. Codes were consolidated and three themes emerged: (a) all-around support, (b) we don't know all the answers, and (c) kids come first.

Table 1

Individual Interview Questions Matrix

Research Questions	Interview Questions			
	1. How would you describe your role in a traditional classroom?	2. What did you do to prepare for the change to personalized learning?	3. How did the leaders in your district support you in the change to personalized learning?	4. How would you describe your role in a personalized learning classroom?
1. How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?	X	X	X	X
2. How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model?		X	X	
3. How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?	X			X

Note: Adapted from *Completing your qualitative dissertation: A road map from beginning to end*, by L. D. Bloomberg & M. Volpe, 2012, Thousand Oaks, CA: SAGE Publications, p. 109.

Theme 1: All-Around Support

Participants discussed the support they received from different facets of the district. Participant C said, "Even though you're the veteran teacher and have all the experience, you still need help and to be supported." Support could also come from home. Participant C stated,

> Even at home in my own personal, my family knew that I was going on a new journey here. There were a lot of weekends sitting here at school or my stuff was at home and it looked a little different. More work, different work, but more. Year 2 was better. Last year was better.

Participants perceived administrators as supportive and encouraging through the process of transformation. Participant B recognized the building administrator as "a great support for us, and he's basically entrusting us to make it our own." Participant A explained, "We were the pilot group, so administration was there weekly and made you know, that purpose of being there." Participant C reflected on families who had heard of the work being done and wanted to be a part of the transformation. Participant C commended the administrator for his support: "His leadership allowed for that, so that was positive." According to Participant B, the building administrator

> was very supportive in letting us do what worked for us, and not saying, "You have to do this," or, "Your model must look like this." That was really nice. And knowing that we could do it our way, and he didn't push it.

Participants discussed the need to support each other as a team during the transformation process. Participant C stated simply, "They've got my back." Participant A recognized the team "shared struggles and shared solutions. You definitely build a relationship with each other outside of your profession very quickly because you have to work through it together."

Participant D recalled, "It was a lot of us all working together. Last year, and even the year before, almost every prep, we were all together." For those considering the transformation to PL, Participant A advised, "Be open for ideas and support from your team, whether you want to hear it or not." Participant D explained the experiences of the team during the transformation:

> Sometimes it was just, we're all going to correct our math papers, but as we do it we're going to talk about, what's going good here, what do we need to work on, what's coming up that we need to plan for and stuff. I would say that's how I prepared for it the most, was talking to colleagues.

Participant C recognized team teaching "lent itself to so many more conferring opportunities and one-on-one interactions between an adult and the kid, because he could lead, and I could be small grouping or even [spending] one-on-one time with kids." Participant C found benefits in team teaching: "The beauty of it is the four of us, especially last year, everything is shared. There's no us-against-them." Participant D recalled the collaborative efforts: "We had all these things we were reading, and a-ha moments, and then we would come together and say, 'Yeah,' or, 'Let's tweak it and do it this way,' or, 'This isn't working, let's try this instead.'" Participant C stated, "We share everything. We try our best to make each other's lives go well and stay positive."

Part of the need to support each other as a team came from the lack of support from peers. Participant A said, "We all felt kind of like a target for the first year and even little parts of last year where we found opportunities and we took them and invited others to join in on different opportunities, and there wasn't a whole lot of support." Participant B expressed that the team did not "want to be put on pedestals; we just want to be like everyone else." As time went on, the community became more understanding. Participant A recalled, "Trusting community

was hard at times those two years, but once more people got invested in it themselves and understood what we were doing and why, I think that kind of simmered things down a little bit."

Multiple references were made to the teacher-leader, who organically led the team and was instrumental in supporting participants. Participant C described Participant A as "such an integral part with her knowledge of PL and her knowledge of just taking the bull by the horns." Participant B explained,

> We were very apprehensive about the whole process of going into personalized learning, but with the support from [Participant A] . . . [Participant A was] awesome. I mean, she's just so driven with this, honestly. If it wasn't for her, it wouldn't be where we are now.

Participant D acknowledged Participant A was "fantastic, and she was really a push, and thinking outside the box." Participant C stated that Participant A was

> the cultivator that really got me bought into it, and [she] had such passion about the good things it would do for kids and their learning that you just couldn't help but jump on her bandwagon since she was so excited about it.

Participant C recalled telling Participant A, "It was always a group effort, but you were leading us."

Theme 2: We Don't Know All the Answers

The second theme of the interview process, *we don't know all the answers*, was perhaps the most widely and deeply discussed theme. Participants described traditional classrooms and discussed the various forms of professional development that aided the team in understanding the transformation. The team members also explained how the transition to personalized learning unfolded, discussed the triumphs and tribulations, and offered lessons they learned through PL implementation.

Participants described their roles in traditional classrooms. Participant B explained, "In the past where I'm in the front of the group, and here you go, here's a worksheet, okay, any questions, come up and see me, because, half the time no one would come up and see me anyways." Participant D recalled, "I knew what I was going to teach, and I taught it, and they did it." Participant C defined traditional learning as

> Very much teacher-led, very much my knowledge of the curriculum and delivering it to the kids, a lot of it was direct instruction. It wasn't always a bad thing, but it was very much what I thought they needed to learn, and how I wanted to deliver it.

Participant A said, in the traditional model of teaching, "It was just drilled in us that you needed to get through this content in this amount of time, that you didn't really feel obligated to listen to the kids, which you definitely should have."

Participants recognized various forms of professional development as they started to uncover what personalized learning was and how it could be implemented. Participant A recalled professional development involved "site visits, networking, reading materials on my own." Participant B explained, "We had a lot of classroom observations that me and my teammates got to go to different school districts through the surrounding area to see how they tackle classroom personalized learning, and also, the combination classes, combining two teachers." Participant A stated, "Not only just seeing it, but making time to network then with those teachers that we met was really helpful." Participant B spoke of the experiences in PL classrooms:

> They actually gave us time to sit down and talk with them, and just hearing their points, where they started with, and their success stories, and their horror stories as well, it was nice to know, yeah, it's scary, they were just as scared as we were going into this all.

Participant C recalled benefiting from "any of the coursework that I was exposed to, listening to different speakers, visiting with teachers who were doing that, having their e-mails, being able to network with them. Getting pretty familiar on Twitter." Participant A suggested, "Look outside of your team for support and ideas, and be willing to try things that are outside of your comfort level, because they will be."

Participants reflected on the triumphs and tribulations the team faced as they began trying new things in the classroom and continued to face in their third year of implementation. Participant D stated, "I think for me, just the control, of wanting to make sure that everybody knows everything. That's super hard." Participant A recognized, "The biggest thing was letting go of the control and being okay with that." Participant B stated, "I still want to make sure that the students are getting what they have to get in order to succeed, to go to the next level, in the next grade, or next standards. Having that taken away was scary."

Participant A reflected on the team's trial-and-error approach; "It was, 'Okay, this is what I did this morning, and it was horrible. What did you do?' or, 'Let's look at this group of math kids today, they can be pushed forward. What are we going to do for them?'" Participant C remembered, "My huge thing was the whole data collection. Where do you house, where do you keep what you're finding out about them? That is still a big challenge." Participant C said, "I just want someone to show me how to do it. Well, there's no one to do that." Participant B questioned, "Sometimes I just struggle with, like, are we really going to get there?" Participant C reflected on the personal growth made through team teaching: "At first it was scary, and then it became fun, and then it came really terrific."

Through the transition period, participants had to make personal changes. Participant B stated, "It is exhausting, I can tell you, but by October, it's like they're in the flow."

Participant D stated, “It’s extremely time consuming.” Participant C acknowledged “having to be open to asking for help, open to questioning, asking questions all the time.” Participant B stated, “Every day is different, so that is a good thing, and with personalized learning, it’s a new adventure every day. It truly is.” Participant D stated, “It’s a challenge. A challenge isn’t always bad. A challenge we can grow from.” Participant C stated, “We’re also still new at it” after two full years of PL implementation.

Throughout the interviews, participants made statements that might be referred to as lessons learned through implementing PL. Participant C learned “it’s not magically going to work. You have to fall back on your best practice teaching no matter what. The kids come first.” Participant D viewed the change as “little by little. Change what you do, and change what they need to do.” Participant C recognized the need to “keep trying new things. Keep trying new things. Like I said, we’re on plan C.” Participant D stated, “We’re three years into it, and it’s certainly not perfect, and it’s certainly not completely personalized, but it’s a lot different, and I think, better than it was. It really is.” Participant A stated, “Be okay with failing because you will. Enjoy it, no matter how stressful and crazy days and nights are. Enjoy it, but also prioritize.” Participant C stated, “Keep trying. Growth mindset. Be open to things that you’d be like, ‘I'm not letting a kid do that.’ Go for it and see what happens. It’s not going to hurt you.” Participant C later added, “That’s the main thing. You’re not going to harm anybody’s kids. You just have to, I don’t know, do what you think is best.” Participant D advised, “Go slow. For you and your learners.”

Theme 3: Kids Come First

The final theme for the individual interviews was *kids come first*. Participants described the transformation of classrooms, teachers’ roles, and students’ roles as PL was implemented in

their classrooms. They explained the transition process as ownership of learning moved from the teacher to the students, and they described the emotions that emerged as a result. Participants also described the changes they made to accommodate the transformation. Throughout the data, the emphasis was on how the learning was student-focused.

The first transformation often noticed in a PL classroom was the visual image of the removal of standard classroom desks, replaced by collaborative spaces. Participant B explained, "I know it's not about the space, of course, personalized learning is not about the cool chairs in the front and stuff." According to Participant C, "The first thing you notice is the seating and stuff. It's not about the furniture . . . They come in and they say, 'Oh, mood lighting.' They see a comfortable chair. That's not what it's about." Participants noted there was a purpose to the transformation in workspace. Participant B explained, "It allows more flexibility for me to be around and check on each individual group." Participant C stated, "It's about the kids owning it." Participant C also described the classroom as "nurturing and a space where the kids know that they can grow." According to Participant D, "That's just the room, and what's really different is them understanding their learning."

As PL was implemented at the study site school, teachers had to make changes. Participant C admitted, "The change last year was I had to let go." According to Participant D, "We really did it gradual, and introduced the kids just gradually. We really just gradually gave them more choice and voice." Participant D recognized the kids "probably didn't even realize the changes were happening, and they were happening." Participant C remembered realizing "they should be talking more than I am." Participant B explained, "Now it's my job to sit back, I'm just a fly on the wall. I want to hear you guys." Participant A stated, "The understanding of the control now goes to them, and the planning goes to us, not just me, and the instruction goes

to us, and not me." Participant D said, "I think I'm more focused on personalized learning as being their journey, and their ownership, of their learning."

Participants described the transformation of relationships in the classroom. Participant C noticed students wanting to know "the relationships will come first. They will work harder and better when they know you care about them. Bottom line." According to Participant A, the teachers were "learning about them as people and they're learning about themselves." Participant C explained, "It's a relationship that you have faith in what they can do, that you're there to support them and help them grow." Participant B stated, "I keep telling them, 'Who's learning is it?' They say, 'It's our learning.' I've said that over and over again, and since they take ownership over their learning, it's just neat to see that light bulb go on." Participant A advised, "Watch your kids and listen to the kids, because they are going to be the people that are going to tell you whether it's working or not. You know, if you feel struggle, they're obviously feeling it too." In situations where the struggle was occurring, Participant A said, "That's a perfect opportunity to pull them in and figure it out together."

The participants recognized the logistics of personalized learning. Participant A explained, "We looked at their work. Were they proficient at it? Were they advanced at it? What do we have already in our toolbox for this group of kids today? It was daily." Participant B stated, "Once they know what we're looking for, for voice and choice in their learning, then we can take a step back and focus on more specific skills with the kids when they're working independently, and I can walk around." Participant A acknowledged the change as "a managing nightmare. But I felt very effective the next day being prepared with knowledge of what my kids were successful with the previous day and what they needed help with." Participant C recognized the importance of "conferencing with a child, finding out what their strengths and

weaknesses are, talking to prior teachers. What did this child excel in? What didn't they? What kind of a learner are they? Are they tactile? Are they auditory?" According to Participant D, teachers were "somebody to confer with them, and to set goals with them, and to guide them in their learning, instead of tell them, 'This is what we're going to learn today, and this is how you're going to learn it.'" Participant C noted some things "have to be a little bit more structured, but there's also other parts of learning that can't be measured with all the data that the kids need and that growing and socializing is also important." Participant A stated, "They're showing up the next day to continue with what they left off with the previous day. So, if you're not ready for what they did and you're looking at their work from the previous day, you're not ready and they're not ready." Participant D explained,

> Personalized learning, really is them goal-setting, being aware of what they have to learn, being aware of themselves as a learner, and how they learn best, knowing where they're at, and where we would like them to get, and them making their own goals about where they want to be and how they're going to get there. It's just really a lot of them being more an individual, and aware of their own learning, and growing and taking it where it needs to be.

Participant C spoke of the student learning observed through PL: "It can blow your mind what they can do." Participant D stated, "Now it's more of having them realize that they are learning, and what they're learning, and taking ownership of, 'Hey, I can do this.'" Through individual interviews, participants created an image of personalized learning and components that contributed to their transformation.

Focus Group Session

After the researcher analyzed the data from the individual interviews, all four participants engaged in a focus group session of approximately one hour and 15 minutes. The session was video- and audio-recorded using Rev Voice Recorder. Table 2 indicates the alignment of interview questions with research questions.

After the focus group session, the recording was submitted to Rev Voice Recorder for transcription. The researcher reviewed the transcriptions with the audio recordings to check for accuracy. Data were coded by listing keywords from the transcription and combining similar ideas into codes. The researcher documented the frequency of each code and consolidated data. Three themes developed from the focus group session: (a) not there yet, (b) building a family, and (c) students as experts.

Table 2

Focus Group Questions Matrix

Research Questions	Interview Questions		
	1. What do you perceive are the strengths of personalized learning?	2. What do you perceive are the weaknesses of personalized learning?	3. What did you experience in your transition to personalized learning?
1. How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?	X	X	X
2. How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model?	X	X	X
3. How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?	X	X	X

Note: Adapted from *Completing your qualitative dissertation: A road map from beginning to end*, by L. D. Bloomberg & M. Volpe, 2012, Thousand Oaks, CA: SAGE Publications, p. 109.

Theme 1: Not There Yet

Participant C reflected on personalized learning in the district: "There are some differences in perceptions of what it is and what it looks like and who is doing it this way, it's kind of a weakness." Participant C recognized that after two full years of personalized learning implementation, "we are not there." Participant A followed up the statement: "Nobody's there."

Participant A described the first changes as occurring "little by little. It was that learning style that was something brand new, and the growth mindset stuff, and morning meetings, talk time as a class, they'd never had that. We didn't know." Although the teachers did not know, Participant C stated, "It's okay to say out loud, oh my gosh, you have something you're weak at. You don't have to know everything."

The team recognized the need to let students have more control of their learning, which required teachers letting go of control. According to Participant D, "It's hard to let them have more of the control." Participant B stated, "Trusting that the learners are going to get what they need, and hopefully showing them how to get what they need. Giving up the big show for me is hard." Participant C recognized, "Letting the children help me make those is something that I'm really having a hard time with." Participant D stated, "The time frames of taking away due dates, and I'm doing that with my eighth graders, our trimester is the 22nd, you have to have two projects done and complete by then. That's scary."

While participants acknowledged some of the difficulties of the transformation to PL, they also recognized teachers learning to be flexible. Participant C said, "Changing as a teacher in a way, that's been very scary, but in a way, also exciting to say, 'Try something, boys and girls, try it, you don't have to have my approval for every little move you make.'" Participant B stated, "Some days it's really hard to get everything in, and we have to come to the realization that it's okay." Participant C described the team through the transformation process: "We were really kind of deer in the headlights." Participant A stated, "Our first plan was to work in math, and it failed." Participant D reflected, "We couldn't really let the kids and ourselves guide it, we were constantly every day assessing, what's going well, what isn't. When do we take the next step? Are you ready yet? Nope. Why not?" Participant C remembered conceding, "Let's try

something new, the kids are our priority, whatever they need, let's try something new if they're not learning." Participant B explained the new classroom process: "I have lesson plans for the week, it changes after day one. It's just a skeleton for it, even though I put math lesson every day, but I'm already changing it and modifying it based on what I'm seeing." Participant A stated, "The aspect of what happens inside the classroom of how the teacher and kid role is, I liked that we kind of got to move in our own speed." According to Participant C, "They are getting a little bit better, but the whole me changing too has been kind of cool, and being a little bit more, step to the side." Participant A added, "All that stuff comes into play as the year goes on."

Participants recognized that support from administrators, time, and teaching experience helped the transformation process. Participant A remembered, "We met administration every week in our team meetings, reflecting with us and listening to our problems." Participant A said, "The support in person is important because if you're not in person to know the struggles or the celebrations, then it is perception, and then it's hearsay, and that creates a whole other community piece that doesn't make it nice for everybody." According to Participant C, "The best practice of teaching, the experience teaching of this group that made us. We felt it, but we still plowed through because we know how to teach." Participant B stated, "We also had the time every day we spent with each other going over what works what doesn't work." Participant A expressed the importance of "the understanding of why it was the best move, instead of what is personalized learning, a, b, c, d, e, f, g, and now why should we use it? The *why* should be first." Participant C stated, "We know what's good for kids. Putting it with the PL spin is difficult, but we still know how to teach. For a brand new teacher with no classroom management or those sorts of things, different story." Although each of the supports was

instrumental to the team's transformation, the team members still felt they had not fully implemented PL after two full years of making changes.

Theme 2: Building a Family

Building a family emerged as the second theme in the focus group session. Participants discussed the vulnerability they felt as they approached their PL classrooms and expressed how important they felt it was to be genuine with students. Participant A acknowledged, "Relationship building with the kids is so huge." Participant B said, "After that whole beginning of the year spending time getting to know them, the relationship aspect is just awesome with personalized learning." Participant A indicated, "It's that family piece of calling it a family, and they are with us more than they are with their own family." According to Participant B, "The conversations are real. They are genuine with our learners; it seems like they have the empathy piece built in now. It's so worth it. It really is." Participant C stated, "It's looking at them beyond just a kid at a desk, looking at the whole person." Participant A explained, "It connects a lot quicker when you can be a person too." Participant C acknowledged, "The whole honesty piece is a lot stronger in my world." Participant B explained, "They know about loss in my family through the beginning of the year getting to know your stuff, and there isn't anything that is going to happen that I won't understand, I reiterate that." Participant D said, "They've heard it all, it's real stuff."

Teammates also developed relationships with each other that were more intense after PL. Participant C reflected, "The teaming, the working together has been wonderful in my opinion." Participant B indicated, "To me, it's all about the team." Participant C recognized, "We had each other's back, and we knew that we are good teachers." Participant D stated, "We work a lot closer together. We do a lot of the same things." According to Participant C, "We had each

other, that was the main thing." Participant B recognized the team as a whole: "I thank these colleagues beyond all. I can because of the support and hearing the cool ideas and hoping that I can throw a bone their way too now and then, it's just been amazing." Participant C stated, "It's helpful to play off each other's strengths. I love that." Participant B added, "Whether they use it or not, but at least we're bouncing ideas, and we're sharing, and we're talking all the time." The team worked as a family with adults and students to continue the transformation to PL.

Theme 3: Students as Experts

Students as experts was the final theme in the focus group session. Participants recognized students took responsibility for their learning and were expected to practice skills independently. Participant B felt students started to realize "it's what you're learning and how you learn best." Participant A stated, "That learning responsibility, I think, comes after practice and understanding, 'This is really important. I really need to prioritize this.'" According to Participant B, "They are pretty much on task and then I can work with those that need the extra support while the others are off and going." Participant A explained the transformation as "seeing the independence of the kids as the year goes on. You start becoming a background facilitator for some of them that don't need you as much because they've learned to go about their business on their own." Participant B reflected, "I like seeing that they can go to their Chrome Books and they can get going with whatever learning that they're wanting to demonstrate and I don't have to be on them." According to Participant A, "They know that when they turn it in, they're not done, but they can reflect then, make changes."

Participants noted the growth that emerged through students becoming experts in the classroom and the motivation students gained in their independence. Participant C stated, "I couldn't believe their growth. It was amazing last year." Participant D acknowledged, "I like

the goal-setting part of it and the fact that the kids are more invested in their learning." Participant A stated, "They're motivated." Participant D shared, "A sixth-grade teacher said to us this year, I can't believe these kids and how they came to us." According to Participant A, "The more exposure they get, the better they're going to be." Participant D stated, "They're trained well, and they understand the expectations."

Triangulation

Data from document review, individual interviews, and the focus group session were triangulated in order to avoid misinterpretation. The researcher considered the themes from data collection and connected similar themes. From the similar themes, two main themes emerged: (a) participants learned through the transformation process, and (b) students were the focus of the transformation. Five themes led to the first main theme and four themes contributed to the second main theme. Figure 1 shows the triangulation process.

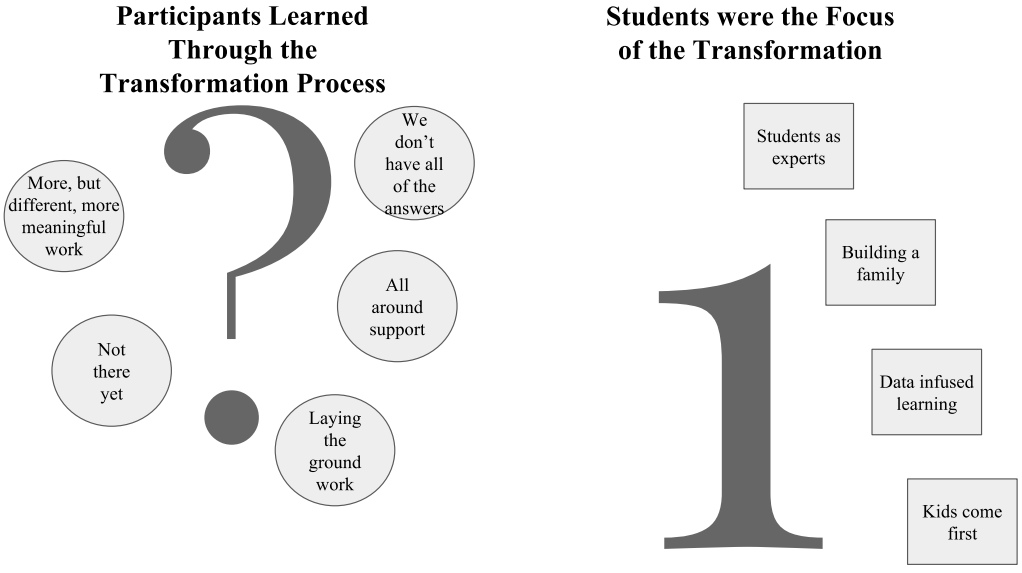

Figure 1. Triangulation.

Outliers

Two outliers emerged from the data analysis of document review, individual interviews, and the focus group session: (a) the roles of parents and (b) community outreach. Although each of the codes appeared two times, participants did not discuss them in depth. However, even though the theme *roles of parents* was only mentioned twice, once in document review and once in the individual interview process, it was considered a noteworthy aspect of the study. In the focus group session, participants expressed concern about ensuring parents understood the reason for the transformation and how changes would be implemented. In addition, during the focus group session, the concept of community outreach was mentioned. The team members expressed the need to connect with the community, locally and globally. Each of these codes was an outlier; however, participants considered each of them when discussing personalized learning, making them noteworthy.

Summary

This qualitative research study focused on the transformation from a traditional classroom to a personalized learning classroom. Four teachers in their third year of PL implementation participated in this study. Data were collected first through document review, wherein reflective documents pertinent to the transformation process were obtained from participants. Documents included reflections, coursework, presentations, newspaper articles, and the district video on personalized learning. Participants then engaged in individual interviews, followed by a focus group session.

Nine themes emerged in the study: (a) laying the groundwork; (b) "more work, but different, more meaningful work"; (c) data-infused learning; (d) all-around support; (e) we don't know all the answers; (f) kids come first; (g) not there yet; (h) building a family; and (i) students

as experts. When data were triangulated, two main themes emerged: (a) participants learned through the transformation process, and (b) students were the focus of the transformation.

The two main themes aligned with the central research question, "How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?" Participants said they did not feel they had all of the answers, even as they were beginning their third year in PL classrooms. Although this could appear as a negative, the teachers conveyed the theme as a positive. Participants had come to the realization that they needed to give themselves permission to try, possibly fail, and learn from both successes and failures. Additionally, the second main theme of this study, *students were the focus of the transformation*, answered the first research question. Above all, participants stated, no matter what happened in the classroom, the students were the top priority.

The second research question for this study was, "How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model?" Participants discussed the planning and professional development they engaged in throughout the transformation. Although their preparation efforts were helpful, each participant said there was no way to prepare adequately, because every day and every year brought new challenges. Once again, the first main theme, *participants learned through the transformation process*, emerged to answer this research question.

The third research question was, "How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?" The second main theme, *students were the focus of the transformation*, supported this research question. Throughout the study, participants described the interactions in their classrooms and

conveyed the idea that students' needs—whether educational, physical, or emotional—came first.

Previous researchers have noted the contributions of professional development and support during the PL transformation process. Chapter 4 provided the data collected for this qualitative study. The first set of data was collected through document review, including reflections, coursework, presentations, newspaper articles, and the district video on personalized learning. After document review, participants engaged in individual interviews and a focus group session. Nine themes were developed. Triangulation provided the means for two main themes to emerge in this study. The two central themes aligned with the research questions. In Chapter 5, the researcher discusses the themes in more depth and provides specific examples of statements from participants to support the themes. Implications and conclusions are presented.

Chapter 5: Summary, Conclusions, and Recommendations

Two main themes emerged in this study: (a) participants learned through the transformation process, and (b) students were the focus of the transformation. In this chapter, the researcher delves into each of the themes, applies the literature to the study findings, and draws conclusions from the findings. Theoretical and practical implications of the research findings are discussed, and limitations of the study are noted. The researcher concludes the study with recommendations for future research and future practices.

Summary of the Study

Personalized learning (PL) has been identified as a classroom model that can support the needs of students as they prepare to join an evolving workforce (Wolf, 2010; Zmuda et al., 2014). Employers seek individuals who are goal-oriented, creative, innovative, and able to self-regulate (Jaros & Deakin Crick, 2012; Senge et al., 2000; Zmuda et al., 2014). Traditional classrooms do not prepare students for a workforce that requires individuals to be leaders (Wolf, 2010). The transition from a traditional learning model to a PL model requires change, yet school leaders are known for having difficulty with change (Jorgensen, 2006). Some teachers have transformed their classrooms to meet the needs of the futuristic workforce; in fact, teachers are often the leaders of the transformation (Margolis & Nagel, 2006). In this study, the researcher explored the experiences of middle school teachers as they engaged in the transformation to personalized learning.

Implementation of a new model of learning can be both exciting and challenging. Although attributes of learners in PL classrooms have been recognized (Deakin Crick et al., 2004; Sungur & Tekkaya, 2006), a lack of information regarding the roles of teachers in PL has been noted (Garrett, 2008; Pane et al., 2015; U.S. DOE, 2014). Teachers play an important role

in the transformation process (Margolis & Nagel, 2006); therefore, it is important for teachers to understand the reason for change, accept change, and discover how to implement new ideas (Nary, 2014). Although teacher support and buy-in are components of the transformation process in schools (Margolis & Nagel, 2006; Nary, 2014), supportive leaders also play a role in assisting teachers with the transformation process (Bosso, 2014). Teachers also need the support of professional development as PL is implemented (Karmeshu et al., 2012).

Change is more lasting when it is understood (Fullan, 2011); therefore, in this study, the researcher sought to provide deep understanding of the transformation from a traditional classroom to a personalized learning classroom. The researcher explored the transformation process using four teachers' perceptions of their transformation to personalized learning as they entered the third year of PL. Three research questions guided data collection in this study:

1. How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?
2. How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model?
3. How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?

Four middle school teachers in their third year of PL implementation participated in this study. Each participant provided reflective documents, including reflections of the transformation to PL, coursework, and presentations created by two of the participants for state professional development seminars. Additionally, participants provided local newspaper articles on the transformation and the district video on personalized learning. Participants then engaged in individual interviews, followed by a focus group session. The researcher manually coded and

analyzed data from all three forms of collection. Nine themes emerged from the data. Three themes emerged from the document review: (a) laying the groundwork; (b) "more work, but different, more meaningful work"; and (c) data-infused learning. Three themes emerged from the individual interviews: (a) all-around support, (b) we don't know all the answers, and (c) kids come first. In addition, three themes emerged from the focus group: (a) not there yet, (b) building a family, and (c) students as experts. From data triangulation, two main themes emerged for this study: (a) participants learned through the transformation process, and (b) students were the focus of the transformation. The implications of these two main themes and the findings are discussed in this chapter. The researcher also provides recommendations based on the research findings.

Summary of Findings and Conclusion

Personalized learning has been recognized as a classroom model that aids in developing skills students can use in an evolving workforce (Laufenberg, 2010; Senge et al., 2000; Wagner, 2012); however, the model of learning has left members of the educational community with many unanswered questions (Cavanagh, 2014; Zmuda et al., 2015). This study focused on four middle school teachers engaged in their third year of PL implementation. The participants' insights and perspectives provided a clearer picture of the transformation from a traditional classroom to a PL classroom.

Research Question 1

Teachers experience changes. The first research question was, "How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?" Personalized learning allows students to become the center of the classroom, moving teachers into a supportive role (Grant & Basye, 2014). As the

transformation to personalized learning occurs, teachers should understand their roles in the process (Karmeshu et al., 2012); however, there is not a clear route to implementing PL. Participants in this study provided their perspectives to describe how their roles changed through the transformation, and their insights may help others who might engage in the transformation to PL develop an understanding of the change. After triangulation, two themes emerged from the research data: (a) participants learned through the transformation process, and (b) students were the focus of the transformation. Each theme aligned with the three research questions.

Participants learned through the transformation process. The first theme of this study was *participants learned through the transformation process*. In traditional classrooms, teachers are often expected to have the answers (Dembo & Eaton, 2000) and to be able to provide a framework for students to acquire the correct answers. Teachers in traditional classrooms carry a certain amount of power and control because they have the answers. Traditional classrooms tend to be more teacher-centered and have even been described as a dictatorship. Consistency comes in having lesson plans, answer keys, and time lines in which each concept should be mastered (Senge et al., 2000). Traditional teaching has long been suited for preparing students for futures on assembly lines; however, the study site school determined that preparing students for a futuristic workforce was no longer a good fit for their school. As employers seek individuals who are creative, innovative, and self-motivated (Grant & Basye, 2014; Zmuda et al., 2015), school leaders are moving to more student-centered learning (Wolf, 2010). As the transformation occurs, teachers try to understand how to implement the new model in the classroom. Teachers at the site school were willing to grapple with the idea of change, even though they felt they did not have all of the answers, similar to the results of Goldsworthy et al.'s (2013) study on transformational schools.

Adult learning. Personalized learning has been recognized as a student-centered form of learning (Zmuda et al., 2014). For teachers, this can mean relinquishing much of the control present in traditional classrooms, including having all the answers. In a PL classroom, while students are learning, teachers are also learning. Although both groups are learning, the adults' learning process can unfold differently, compared to the children's learning process. Participants in this study engaged in this learning process as PL was implemented. Administrators approached the team with the possibility of implementing new model of teaching. The teachers investigated whether the new model would be beneficial to students and how it would be implemented. Although the team members were unsure about the new idea, they were willing to learn more about the concept. Even at first glance, PL was extremely different from the traditional model. For example, tables and collaborative spaces replaced rows of desks.

Student-centered learning was different from the teacher-led classroom the team had performed in for an average of 23 years. As the team of teachers began to uncover the nature of PL, they were able to see the benefits of the approach; however, they still had many questions. Together with administrators, the team planned out the implementation and began acquiring more knowledge through professional development. Even in their third year of implementation, the teachers continued to develop new knowledge and new approaches to PL. What seems most notable about this process was the lack of timeframe for each step of the process; in fact, sometimes, steps were repeated. In other words, the participants did not have all the answers for the new model of learning.

Each participant recognized the difficulty of letting go of control in the classroom. As teachers with an average of 23 years of experience in traditional classrooms, they recognized their role was to instruct. Participants found it difficult to pass the responsibility for learning to

the students. Participants described this relocation of power as "scary," instilling apprehension. Teachers must believe in the concept of PL in order to make the transformation possible (Margolis & Nagel, 2006). Although there were moments of fear and uncertainty, the participants still believed PL would benefit the students.

Throughout the transformation, teachers expressed the need to keep trying new approaches and learning from both triumphs and failures, a practice that has resulted in "substantial progress" for other transformative schools (Goldsworthy et al., 2013, p. 37). Participants recognized that not every new approach worked. When implementation methods were not constructive, the teachers were open with students and identified what they felt was not working. The teachers modeled for students by accepting the situation and learning from the experience, just as they wanted students to do with their own work. Teachers and students then worked to find a new solution to the adversity that prevented the desired results. The participants described the transformation as exhausting, time consuming, and challenging; however, participants acknowledged the process and the importance of going slow and doing what was best for kids. The team utilized best teaching practices and years of experience to ensure students were engaged in learning. Participants acknowledged the need to let go of dictating in the classroom, allowing students to lead and teachers and students to learn along the way, thus facilitating the transformation.

Although the transformation was recognized as being more work, teachers were rejuvenated in the classroom. They expressed their motivation and excitement to see a new perspective on learning. Participants observed students as they made more choices in the classroom and became leaders rather than followers. Taking a step back and learning how to teach in a different way was difficult for the veteran teachers; however, the benefits of PL

outweighed the struggles of the implementation. Through trial and error, as well as confidence in PL, the participants worked their way through the transformation.

***Students were the focus of the transformation*.** The excitement of teachers can be contagious; however, there were misconceptions to overcome as PL was implemented. Participants recognized the misunderstanding that PL can become overly focused on the transformation of workspace, rather than on the transformation in learning. The visual experience of walking in a PL classroom might be surprising. The lack of rows and desks has made the transformation of learning spaces one of the most noticeable changes in PL classrooms. Participants explained that the changes might be more visible when looking at tables and comfortable seating; however, the transformation took place at a much deeper level. Even as participants spoke about the process, their words transformed—instead of speaking about "I" and "me" in discussing the traditional classroom, they spoke of "us" and "we" in considering the PL classroom.

In addition, there was a transfer of classroom power in the transformation to PL. PL was described as being the students' journey toward ownership of their own learning. Transitioning the power from teacher to student was difficult for the participants; however, the results of student learning and engagement were profound. Although transformation might be difficult for teachers, the participants noted the importance of meeting student needs first. Putting students first and ensuring each individual's needs were met was instrumental in the transformation for the team of teachers.

Participants were not only concerned with students' academic needs, but also recalled becoming a family with the students in their classrooms. The team admitted they allowed themselves to be vulnerable with their students and showed the students facets of themselves

they might not have disclosed in a traditional classroom. This holistic approach to teaching may have been present in traditional classrooms to some extent, but the team acknowledged PL as being more conducive to developing students as a whole. The flexibility of the PL model allowed participants to attend to each individual's needs in the classroom, putting kids first.

Research Question 2

Professional preparation. The second research question was, "How do teachers professionally prepare for the change in instruction from a traditional model of learning to a personalized learning model?" The theme *participants learned through the transformation process* aligned with the professional preparations made by teachers. Although teachers did not have all the answers, they sought advice and information from sources that could assist them in developing PL. Through collaboration, support, and professional development, teachers were able to ground themselves in an understanding of PL to make the transformation possible.

***Collaboration*.** Collaborative reform, especially stemming from within, has been recognized as beneficial to both teachers and students (Nary, 2014). The participants recognized collaboration as an integral component of making the transformation to PL. Collaboration happened through connections with several groups, including peers, administrators, and students. Whether face-to-face or virtually, the participants continued to seek advice, feedback, and support from individuals involved in PL transformation.

Prior to implementing PL, participants spent the summer working together to align curricula and standards and plan how to approach PL. Although the team preplanned as much as possible, much of what they thought and planned about the school year changed as PL was implemented. When the school year began, the team of teachers collaborated with each other on a regular basis. They were able to spend each morning reviewing student data and discussing

how to approach learning for the day. Participants shared what worked and what did not work, made suggestions for each other, and collaboratively proposed solutions to problems.

Collaboration also took place with other, outside teachers who had experience in PL. Through social networking, blogs, site visits, and courses, the team was able to discuss different approaches other teachers used to implement PL in classrooms. Networking with PL teachers who were willing to share their experiences and emotions through the transformation provided insight for the team. Hearing the perspectives of teachers who had been through the process helped the team to understand more clearly how PL could work. Collaboration also allowed participants opportunities to discover new practices that were not present in traditional classrooms. Engaging in deep discussions through collaboration was recognized as critical to the team's implementation of personalized learning.

Support. Teachers need individuals willing to support and encourage them as the transformation to PL occurs (Margolis & Nagel, 2006; Nary, 2014). Nary (2014) acknowledged the importance of reform working from the middle out to guide the transformation process. Although one participant was acknowledged as a leader, the team worked together to help each other and celebrate successes. Whether playing off each other's strengths, venting, or sharing triumphs, the team members supported each other through good times and bad. Participants understood the struggles and frustrations of their peers as only the team could. They supported one another and worked together to find methods that could propel the transformation.

Administrators, particularly the building administrator, were recognized for their support of the team. Face-to-face discussions and weekly meetings to reflect and examine the progress of the transformation helped the team feel the support. Although the team had an average of 23 years of teaching experience, they were encountering new, unfamiliar expectations. The support

of administrators allowed the team members to work through the unknowns at a comfortable pace. Team members were able to have open, honest discussions about the transformation with the building administrator and seek advice as the transformation unfolded.

Professional development. Teacher training was recognized as the most significant factor contributing to the implementation of PL (Karmeshu et al., 2012). The team utilized various forms of professional development to understand PL more deeply. Coursework, site visits, individual reading and research, and listening to professional speakers contributed to the team members' knowledge development. Each participant recognized a different form of professional development as providing the most helpful information, reinforcing the idea that even adults learn in different ways. The team members also taught each other by sharing what they learned through personal experiences. Professional development allowed teachers to begin implementing PL as reinvigorated learners.

Research Question 3

Classroom interactions. The third research question for this study was, "How does the transition from a traditional classroom model to a personalized learning model change how teachers interact in the classroom?" The second theme that emerged from the research data (*kids come first*) addressed this question. Emotionally and academically, teachers have always tried to put the needs of students first. In the PL classroom, flexibility allows more time to know each individual student, compared to the traditional classroom, and facilitates providing specific support for meeting students "where they are," both academically and emotionally. Through data-infused learning, teachers were able to attend to students holistically, thus allowing students to become experts and creating a family within the classroom.

Data-infused learning. Participants spoke of the intense data review in their classrooms. For example, the teachers used learning style inventories (LSIs) to determine how each individual learned best and discover each student's interests. The LSIs highlighted areas where students struggled so teachers could attend to weaknesses as well. Teachers were able to utilize the LSI to understand the strengths, weaknesses, likes, and dislikes of each individual in their classrooms. The data collected through the LSIs provided one perspective on student learning.

In addition, participants spoke of the constant data review the team engaged in when they evaluated students' daily work. Students received timely, relevant feedback on their work. Teachers said data review was important—if the data had not been reviewed, the teachers were not prepared for the school day. Every morning began with the team of teachers reviewing student work to determine how to approach learning for the day. If the morning did not allow enough time, teachers tried to set aside time later to review any documents that would affect learning each day. Participants described the data review as focusing on student skills and grouping according to specific skill abilities, rather than by overall content ability. This practice allowed the team to attend to the diverse needs of students in the classroom. Participants described this process as a "management nightmare"; however, teachers were able to see student growth, engagement, and motivation because of intensely attending to data.

***Students as experts*.** In traditional classrooms, teachers stand in front of the class, providing students with information previously determined as needed. Teachers are at the forefront of instruction in traditional classrooms, making decisions for what is learned, how it is learned, and how to prove learning occurred. Students are recipients of learning, trying to acquire knowledge through teachers. In contrast, in PL classrooms, teachers support students in becoming responsible for their own learning. As the participants in this study showed, PL

teachers consistently confer with learners to guide them through their learning. Students are expected to become advocates for their needs and to seek out the support they require to meet goals (Zmuda et al., 2014). Although this does not happen immediately in the transition to PL, teachers support and guide students toward developing self-regulation and goal-setting skills through conferring with each student. Students are also able to use "voice and choice" to provide evidence of learning, which can bring motivation and engagement to learning. Developing 21st-century skills takes time, patience, and sometimes learning through failure.

Family. Participants described their classrooms as fostering a family atmosphere. Students stayed in core classes with the same teachers each day, which allowed teachers to develop strong relationships with their students. Flexibility in the classroom created an environment in which teachers were able to confer with students in one-on-one discussions to discover the holistic essence of each student. Participants were able to know each student's likes, dislikes, struggles, and triumphs. Students also developed strong relationships with their peers. They celebrated with one another, taught each other, and worked alongside each other. Just as families sometimes struggle, the PL families struggled together as well, but supported one another through it all.

Implications

Personalized learning has been recognized as a model of education that can benefit students, preparing them for an evolving workforce (Zmuda et al., 2014). Schools that engage in change, shifting from a traditional learning model to a personalized learning model, can have a more lasting result when transformation is at the core of the change (Goldsworthy et al., 2013). Change in schools can be challenging (Jorgenson, 2006); however, the results can be more enduring with teachers at the center of the transformation (Nary, 2014). For transformation to

occur educators, should understand what has worked for schools that have engaged in similar changes (Fullan, 2011).

The purpose of this study was to construct meaning from the data to develop an understanding of the perspectives of middle school teachers as they engaged in the transformation from a traditional model of teaching to a personalized learning model. Constructivism led the researcher to a holistic understanding of the process the team of teachers engaged in as they transformed classrooms. The leaders at the site school put teachers at the center of the change, allowing freedom and flexibility for the teachers to apply their best practices to make the transformation. Participants were able to transform through professional development, support from administration and peers, collaboration, and learning through successes and failures. The team of teachers was allowed to grapple with PL to discover for themselves how to implement new practices in their classrooms. Although participants were aware they did not have all of the answers, they were willing to try, sometimes fail, and learn along the way. There was no perfect implementation method available, so the teachers employed their best teaching practices and applied what they learned about PL to make small, slow changes in the classroom. Participants ultimately kept students at the heart of the transformation, ensuring they met the needs of students.

Theoretical Implications

Framework for PL implementation. In Chapter 2, the need for transformation was outlined; however, the approach to transformation was unknown. Mezirow's (1991) transformative learning theory provided a framework for how transformations could ensue; however, the participants found there were no direct instructions on how to engage in the transformation to PL. As the participants engaged in the transformation Mezirow's theory

became cyclical. The participants were able to revisit components of transformation throughout the process, depending on their needs and the needs of their students.

After triangulating the data sources, the researcher found two main themes emerged from the data: (a) participants learned through the transformation process, and (b) students were the focus of the transformation. As teachers engaged in the transformation from a traditional model of teaching to a PL model, the site school leaders granted the teachers permission to *not* have all the answers, allowing teachers to find their way through the process organically. With support from peers and administrators, the teachers developed an approach to PL they perceived to be the best fit for each group of students. As long as students were the focus of the transformation process, the teachers were allowed to apply their best teaching practices, developed through experience, to cultivate a new model in the classroom. Figure 2 represents the transformation from a traditional model of learning to a PL model.

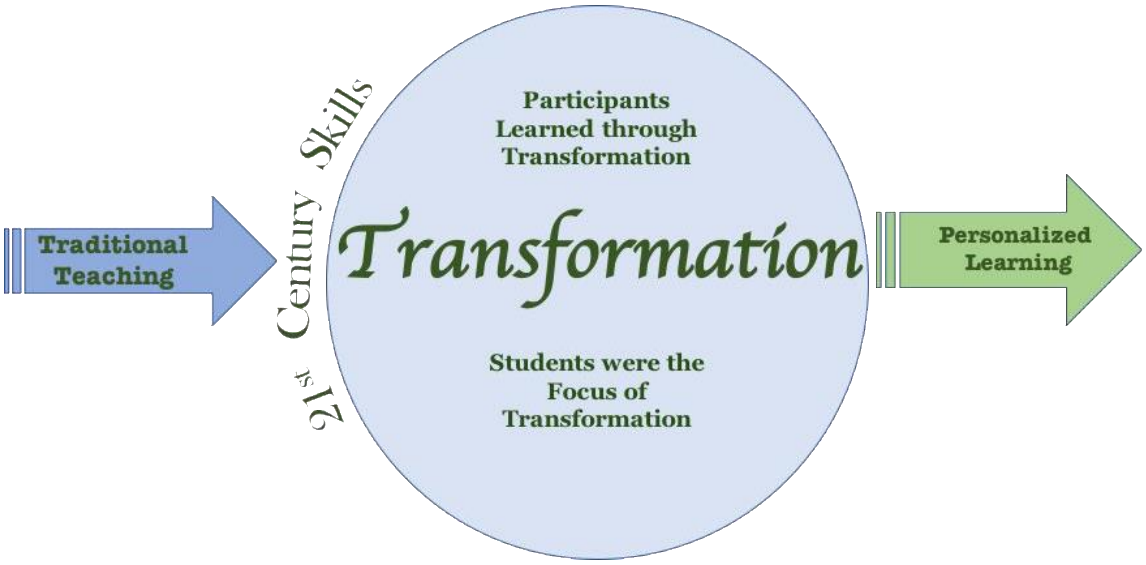

Figure 2. Transformation to PL

The theme *participants learned through the transformation process* aligned with teachers as they transformed. Teachers and administrators should allow teachers to grapple with the idea of PL, rather than prescribe a specific time line and structured expectation of how PL will unfold. Although teachers in traditional classrooms often have the answers, teachers are not expected to have all of the answers in a PL classroom. PL allows students and teachers to learn together, thereby shifting the focus to the learning process. This transfer of expectations provides freedom for teachers to support learning, rather than dictate learning. PL teachers can grant themselves permission to not have all the answers and instead focus on how to support learners in developing skills that will aid them in the modern workforce.

The second theme that emerged in this study was *students were the focus of the transformation*. Participants recognized that every facet of the transformation involved the idea that kids have to come first in the classroom. Whether teachers were taking classes, collaborating, fostering relationships, or digging through data, each step supported students in the classroom. Although teachers admittedly did not have all the answers about how the transformation would unfold, they worked to provide an atmosphere where kids' needs were met holistically, every day.

Limitations

This case study was investigated through the perspectives of four middle school teachers. Each participant in this study was made aware of the components of the investigation and was treated with respect, beneficence, and justice (LaMorte, 2016). Although qualitative designs have been criticized for being subjective (Marshall & Rossman, 2011), the in-depth information collected in this study illuminated an experience that could be difficult to quantify. A qualitative design showed the lived experiences of teachers as they transformed from a traditional classroom

model to a personalized learning model and fostered an in-depth description of the transformation.

Three limitations were noted in this study: (a) a small sample size, (b) a focus on one school district, and (c) the participants and the researcher worked in the same building. First, the small sample size of four participants was a limitation of this study. However, although data may have been limited in quantity, the depth of information allowed the researcher to provide a holistic understanding of a specific situation. Participants willingly provided a vast array of information for the study; however, a larger pool of participants may have provided different findings.

Second, only one school district was included in this study. Because of the variety of PL implementation models, one school district was considered a limitation. Although other schools might institute different expectations of how to implement PL, the focus of this study was very narrow. However, studying one school district allowed the researcher to collect a depth of data in order to illuminate the transformation to PL as one model was implemented. The choice to investigate one school was made purposefully. Focusing on one school allowed the researcher to understand a specific implementation model and facilitated an in-depth understanding of the application. Investigating different PL models could provide different data than were generated in this study.

The third limitation of this study was the fact that the researcher worked in the same building as did the participants. Participants could have withheld information because they had a working relationship with the researcher. Although the researcher did not work in close proximity with the participants, there could have been concern about sharing information on the

participants' part. Although this was noted as a limitation, the participants appeared to be open and honest with the researcher.

Additionally, the researcher had engaged in PL implementation in the same school at which the participants had worked. To mitigate this limitation, the researcher reviewed the data cautiously in an effort to withhold personal experiences from the study. Although working in the same school was a limitation, it also provided an understanding on the part of the researcher that an outside researcher might not have had. This perspective allowed the researcher to obtain in-depth knowledge of the PL model prior to the implementation of the study.

Practical Implications

Research has shown transformation in schools should have teacher buy-in (Margolis & Nagel, 2006; Nary, 2014) and supportive leaders (Bosso, 2014). In this research study, the researcher explored the lived experiences of four teachers who engaged in the transformation from a traditional learning model to a personalized learning model. The participants noted the support received from the building administrator during the transformation and described the flexibility given to the team to discover how to implement PL most effectively. Although the team acknowledged they were still in the process of transforming, Participant D described the experience as "a challenge we can grow from."

As school districts begin investigating personalized learning, many unknowns exist. For some individuals, implementing PL could cause fear and uncertainty; however, the participants in this study showed that teachers should accept the fact that they do not have all the answers. The teachers took educated chances, collaborated with other professionals, and formed their interpretation of PL, little by little. Administrators can allow this to happen by holding open, honest, timely conversations with teachers who are undergoing the transformation to PL and by

supporting teachers as they grapple with the model. Teachers naturally want what is best for kids. If teachers are respected and trusted, they can make changes that best prepare kids for an evolving workforce.

Future implications. The researcher investigated four teachers in a rural middle school. The district administrators allowed the teachers to develop personalized learning at their own pace and in their own way. As personalized learning spreads to classrooms, the opportunities for research are many. This study provides a starting point for understanding a small sample size of personalized learning teachers in the hope that future research expands on the understanding of the transformation to personalized learning.

Recommendations

Recommendations for Future Research

Although this research provides a starting point for investigating the transformation to personalized learning, opportunities for future research remain. The researcher developed four questions related to future research on the transformation to personalized learning, and educational reform:

- What are the experiences of teachers implementing PL based on different grade levels?
- What are the experiences of teachers implementing PL based on years of experience?
- What is the role of administrators as personalized learning is implemented?
- Do the two main themes (*participants learned through the transformation process,* and *students were the focus of the transformation*) transfer to other educational transformations?

These four recommendations are discussed further in the following paragraphs.

Effect of grade levels. This study focused on one grade level. Would teachers at the high school or elementary school levels have similar experiences to those of the middle school teachers who participated in this study? Would similar themes emerge at different grade levels? Investigations into these questions could help the educational community better prepare for the transformation to personalized learning at a district level.

Years of experience. Second, what are the experiences of teachers implementing PL, based on years of experience? Participants in this study had an average of 23 years of teaching experience. The teachers acknowledged that their years of experience supported them in the transformation. The participants had developed practices in the traditional classroom they were able to transfer into a personalized learning classroom. Would studying teachers with less experience produce similar themes? Could teachers newer to the profession have more difficulties because best practices are not well established, or would it benefit the teachers to not fall back on past practices?

Role of administrators. A third question that could be investigated involves the role of administrators as personalized learning is implemented. Participants in this study acknowledged that the building administrator allowed them to make mistakes to devise the best approach, rather than dictating how PL would be implemented. The approach taken by the administrator was commended by the team of teachers; however, would this approach transfer to other PL implementation situations? Would teachers who had more direction be able to implement PL, or would the practice of delineating the implementation harm the transformation?

Transferability of themes. The researcher also questioned whether the two main themes—*participants learned through the transformation process,* and *students were the focus of the transformation*—would transfer to other PL transformations. Each theme seems simple

enough to take the stress out of trying to implement a new practice perfectly. Could the themes also apply to other educational reforms? Would laying out the themes as expectations empower teachers to make changes without being fearful? Ultimately, educators should naturally embrace the idea that kids come first. Allowing teachers the freedom to make mistakes and uncover how to apply practices to the classroom to benefit kids most effectively might make change in schools less feared.

Each recommendation for future research could potentially contribute to the transformation to personalized learning, as well as to other educational reforms. This study was merely a starting point for investigating personalized learning. The themes might also apply to other educational reforms; however, further research is needed to determine the transferability of the themes. Change in education has a reputation for being difficult (Jorgenson, 2006). Perhaps better understanding the perceptions of teachers who have experienced transformation will contribute to altering the status of change in education.

Recommendations for Future Practice

As schools transform on the surface from rows and desks to collaborative spaces, underneath the surface, teachers become learners, and students become advocates for their own learning. Through this transformation from the traditional classroom to personalized learning, there can be much to discover. The traditional model of education prepared students for a workforce wherein they were told what tasks to perform and how and when the tasks were to be done. Personalized learning transforms the model of teaching and learning to allow students to utilize creativity, innovation, and self-regulation to express understanding with the objective of adapting to the changing workforce. Although the PL journey might be long and arduous, the transformation of teachers could also be described as invigorating and rejuvenating. The themes

from this study showed PL teachers have freedom to be experts and to mold classrooms into learning environments suitable for every student. Allowing teachers to learn through the process empowers the experts of education to incorporate best teaching practices to customize learning for students.

In this study, the researcher investigated a transformation to PL that focused on students, attending to their needs with a holistic approach. As participants engaged in the transformation to PL, they entered a world in which data shaped learning, and learning shaped teachers and students. This intense data-infused, family-oriented world was an exhausting, overwhelming management nightmare, yet worth it all. As members of the educational community consider the transformation to personalized learning, teachers will need time to make the necessary changes for implementation. The days of preparing lesson plans weeks ahead and presenting lessons at a fixed time and place fade away with personalized learning. This adaptation of learning requires collaboration, data review, and support from peers and administrators. The requirements for preparing classrooms are changing day to day, and even hour to hour. Although a perfect equation or solution for the implementation of personalized learning does not yet exist, teachers can apply their expertise to mold classrooms, ultimately keeping in mind that kids come first.

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Appendix A: Invitation to Participate

Invitation to Participate

Dear Participant,

This letter is an invitation to consider participating in a study I am conducting as part of my Doctoral degree in the Department of Education, at Concordia University Portland. The research will be conducted under the supervision of Dr. Donna Graham. I would like to provide you more information about this project, and what your involvement would entail if you decide to take part.

This study will focus on the change from a traditional model of teaching to a personalized learning model. The purpose of this study is to explore the lived experiences of teachers as they transition from a traditional model of teaching to a personalized learning model.
The main research question states: "How do middle school teachers experience changes in their instructional roles as the school transitions from a traditional model to a personalized learning model?"

Participation in this study is voluntary. It will involve sharing documents, such as teacher reflections, an interview of approximately 45 minutes in length, and an informal focus group session of approximately 45 minutes. If you feel comfortable, the individual interview and the focus group session will take place at the study site school. You may decline to share any documents and/or answer any of the interview questions. You may also decide to withdraw from this study at any time, without any negative consequences.

With your permission, the interview and focus group will be video and audio recorded to facilitate the collection of information, and later transcribed for analysis. Shortly after the interview and focus group have been completed, I will provide a hard copy of the interview transcripts to you. You will have the opportunity to review the transcripts and confirm the accuracy of our conversations, and add to or clarify any information.

All information you provide is considered completely confidential; however, anonymity cannot be guaranteed in the focus group session. Your name will not appear in any transcripts, data, or analysis resulting from this study. Data collected during this study will be saved on a password protected computer and password protected external hard drive. Three years after approval of the dissertation all collected recordings and data will be disposed of by deleting the files from both the password protected computer and the password protected hard drive. There are no known or anticipated risks to you as a participant in this study.

If you have any questions regarding this study, or would like additional information to assist you in reaching a decision about participation, please contact me at (262) 770-0582, or by e-mail at lehurtienne1@gmail.com. You can also contact my supervisor, Dr. Donna Graham at dgraham@cu-portland.edu**.**

I would like to assure you that this study has been reviewed and received ethics clearance through the Institutional Review Board at Concordia University on July 26, 2016**.** The final decision about participation is yours. If you have any comments or concerns resulting from your participation in this study, please contact the chair of the IRB, OraLee Branch at obranch@cu-portland.edu.

There is no compensation for participating in this study; however, the information you provide will be a valuable contribution to this study. I very much look forward to speaking with you and thank you in advance for your assistance in this project.

Sincerely,

Laura E. Hurtienne
Student
Concordia University Portland

Appendix B: Site Authorization

July 7, 2016

Dear Concordia University Portland IRB:

On behalf of The Study Site School District, I am writing to grant permission for Laura E. Hurtienne, a student at Concordia, to conduct her research titled, "Middle School Teachers' Perceptions of the Impact of Transitioning to Personalized Learning on Instruction and Learning." I understand that Laura will recruit up to four of our teachers and review documents, conduct a focus group, and conduct interviews at The Study Site School District over the next seven months.

Sincerely,

The Study Site School Principal

Appendix C: Informed Consent Form

CONSENT FORM

Research Study Title: Middle School Teachers' Perceptions of the Impact of Transitioning to Personalized Learning on Instruction and Learning
Principle Investigator: Laura E. Hurtienne
Research Institution: Concordia University Portland
Faculty Advisor: Dr. Donna Graham

Purpose and what you will be doing:
The purpose of this survey is to explore the lived experiences of teachers as they transition from a traditional model of teaching to a personalized learning model. We expect approximately four volunteers. No one will be paid to be in the study. We will begin enrolment on August 1, 2016 and end enrollment on April 30, 2017. To be in the study, you will: 1) provide documents for review by the researcher, 2) have an informal, one on one interview with the researcher, for approximately 45 minutes, and 3) participate in a focus group for approximately 45 minutes. You will also have the opportunity to review the transcripts of the focus group and interview, prior to the analysis of the data. Doing these things should take less than 4 hours of your time.

Risks:
There are no known risks to participating in this study other than providing your information; however, we will protect your information. The use of pseudonyms will provide confidentiality; however, the due to the focus group session, absolute confidentiality cannot be assured. Any personal information you provide will be coded so it cannot be linked to you. Any name or identifying information you give will be kept securely via electronic encryption. When we or any of our investigators look at the data, none of the data will have your name or identifying information. We will only use a secret code to analyze the data. We will not identify you in any publication or report. Your information will be kept private at all times and then all study documents will be destroyed 3 years after we conclude this study.

Benefits:
Information you provide will assist in informing the educational community, as more classrooms transition to personalized learning. You could benefit this by seeing an outside analysis of your transition from a traditional model of teaching to a personalized learning model.

Confidentiality:
This information will not be distributed to any other agency and will be kept private and confidential. The only exception to this is if you tell us abuse or neglect that makes us seriously concerned for your immediate health and safety.

Right to Withdraw:
Your participation is greatly appreciated, but we acknowledge that the questions we are asking are personal in nature. You are free at any point to choose not to engage with or stop the study. You may skip any questions you do not wish to answer. This study is not required and there is no penalty for not participating. If at any time you experience a bad emotion from answering the questions, we will stop asking you questions.

Contact Information:
You will receive a copy of this consent form. If you have questions you can talk to or write the principle investigator, Laura E. Hurtienne. If you want to talk with a participant advocate other than the investigator, you can write or call the director of our institutional review board, Dr. OraLee Branch.

Your Statement of Consent:
I have read the above information. I asked questions if I had them, and my questions were answered. I volunteer my consent for this study.

_____ _____
Participant Name Date

_____ _____
Participant Signature Date

_____ _____
Investigator Name Date

_____ _____
Investigator Signature Date

Appendix D: IRB Approval Letter

July 26, 2016

Laura Hurtienne Concordia University - Portland IRB (CU IRB)

[932298-1] Middle School Teachers' Perceptions of the Impact of Transitioning to Personalized Learning on Instruction and Learning

EDD-20160711-Muirhead-Hurtienne New Project

APPROVED July 26, 2016 July 26, 2017 Expedited Review

Thank you for your submission of New Project materials for this project. The Concordia University - Portland IRB (CU IRB) has APPROVED your submission. This approval is based on an appropriate risk/ benefit ratio and a project design wherein the risks have been minimized. All research must be conducted in accordance with this approved submission.

This submission has received Expedited Review based on the applicable federal regulations.

There is some information needed before you can obtain a stamped copy of the approved consent form. You must use this stamped consent form. You cannot recruit individuals until you have this stamped approved consent form from the CU IRB.

Please remember that informed consent is a process beginning with a description of the project

and insurance of participant understanding followed by a signed consent form. Informed consent must continue throughout the project via a dialogue between the researcher and research participant. Federal regulations require that each participant receives a copy of the consent document.

Please note that any revision to previously approved materials must be approved by this committee prior to initiation. The form needed to request a revision is called a Modification Request Form, which is available at www.cu-portland.edu/IRB/Forms.

All UNANTICIPATED PROBLEMS involving risks to subjects or others (UPIRSOs) and SERIOUS and UNEXPECTED adverse events must be reported promptly to this office. Please email the CU IRB Director directly, at obranch@cu-portland.edu, if you have an unanticipated problem or other such urgent question or report.

All NON-COMPLIANCE issues or COMPLAINTS regarding this project must be reported promptly to this office.

This project has been determined to be a Minimal Risk project. Based on the risks, this project requires continuing review by this committee on an annual basis. Please use the appropriate forms for this procedure. Your documentation for continuing review must be received with sufficient time for review and continued approval before the expiration date of July 26, 2017.

You must submit a close-out report at the expiration of your project or upon completion of your project. The Close-out Report Form is available at www.cu-portland.edu/IRB/Forms.

Please note that all research records must be retained for a minimum of three years after the completion of the project.

If you have any questions, please contact Dr. OraLee Branch at 503-493-6390 or irb@cu-portland.edu. Please include your project title and reference number in all correspondence with this committee.

This letter has been electronically signed in accordance with all applicable regulations, and a copy is retained within Concordia University - Portland IRB (CU IRB)'s records. July 26, 2016

Appendix E: Statement of Original Work

The Concordia University Doctorate of Education Program is a collaborative community of scholar-practitioners, who seek to transform society by pursuing ethically-informed, rigorously-researched, inquiry-based projects that benefit professional, institutional, and local educational contexts. Each member of the community affirms throughout their program of study, adherence to the principles and standards outlined in the Concordia University Academic Integrity Policy. This policy states the following:

> **Statement of academic integrity.**
>
> As a member of the Concordia University community, I will neither engage in fraudulent or unauthorized behaviors in the presentation and completion of my work, nor will I provide unauthorized assistance to others.
>
> **Explanations:**
>
> ***What does "fraudulent" mean?***
>
> "Fraudulent" work is any material submitted for evaluation that is falsely or improperly presented as one's own. This includes, but is not limited to texts, graphics and other multi-media files appropriated from any source, including another individual, that are intentionally presented as all or part of a candidate's final work without full and complete documentation.
>
> ***What is "unauthorized" assistance?***
>
> "Unauthorized assistance" refers to any support candidates solicit in the completion of their work, that has not been either explicitly specified as appropriate by the instructor, or any assistance that is understood in the class context as inappropriate. This can include, but is not limited to:
>
> - Use of unauthorized notes or another's work during an online test
> - Use of unauthorized notes or personal assistance in an online exam setting
> - Inappropriate collaboration in preparation and/or completion of a project
> - Unauthorized solicitation of professional resources for the completion of the work.

Statement of Original Work

I attest that:

1. I have read, understood, and complied with all aspects of the Concordia University-Portland Academic Integrity Policy during the development and writing of this dissertation.
2. Where information and/or materials from outside sources has been used in the production of this dissertation, all information and/or materials from outside sources has been properly referenced and all permissions required for use of the information and/or materials have been obtained, in accordance with research standards outlined in the *Publication Manual of The American Psychological Association*

Laura E. Hurtienne
Digital Signature

Laura E. Hurtienne
Name

March 22, 2016
Date