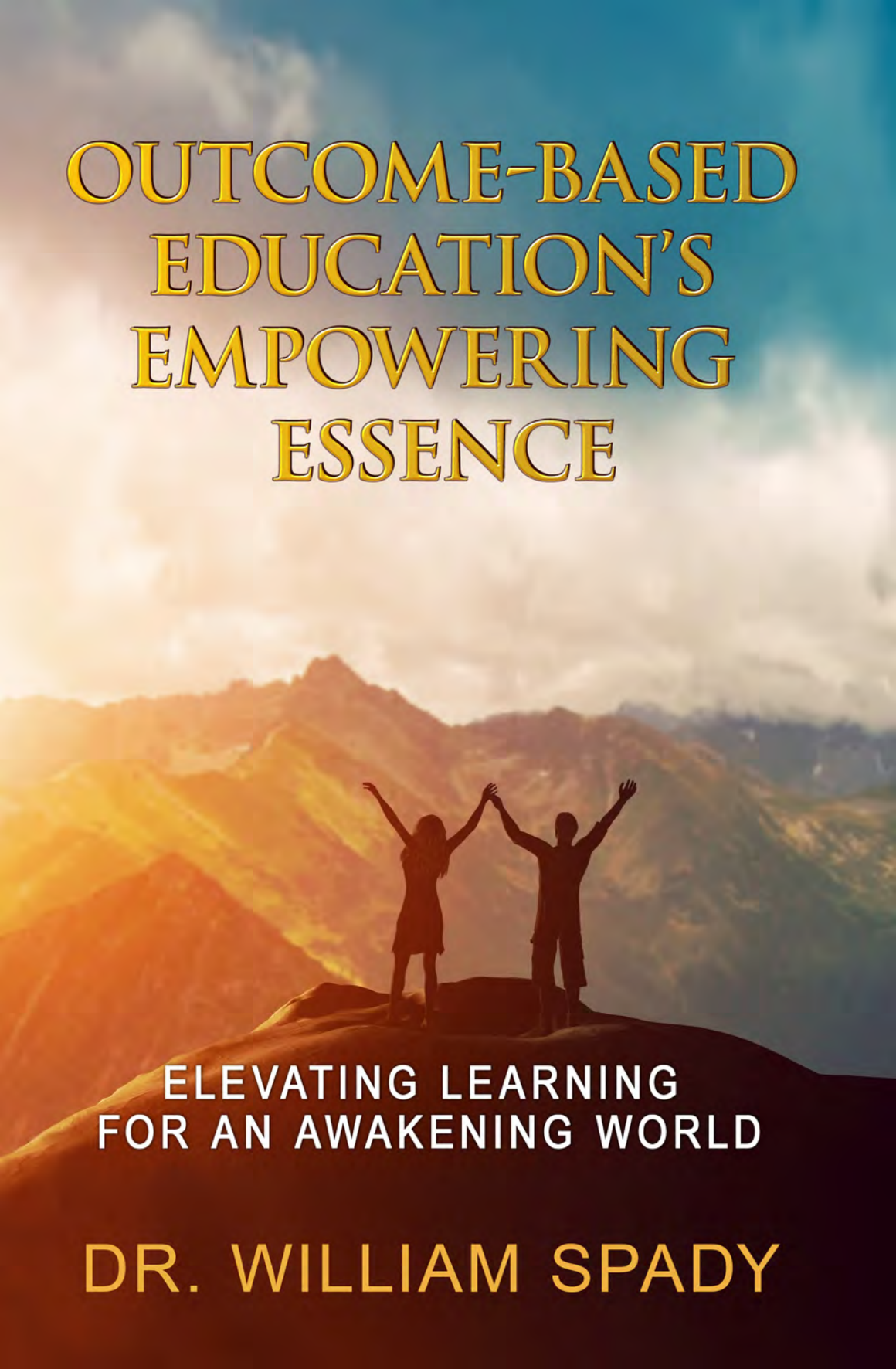
OUTCOME-BASED EDUCATION'S EMPOWERING ESSENCE



ELEVATING LEARNING
FOR AN AWAKENING WORLD

DR. WILLIAM SPADY

Outcome-Based Education's Empowering Essence

Elevating Learning for an Awakening World

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by Dr. William Spady

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Praise for

Outcome-Based Education's Empowering Essence

"Dr. William Spady's revolutionary book on Outcome-Based Education (OBE) provides extensive future-focused and transformational insights into the ongoing, very progressive advancements of OBE across the world. It gives you and educators at all levels paradigm-shifting information and strategies for initiating and applying OBE's transformational principles in your work, and for empowering the potential and accomplishments of your colleagues, students, and yourself. This amazing resource provides you with impressive current U.S. and international examples of Transformational OBE's successful application, and these examples alone provide you with tangible, foundational guidance for using advanced ideas and practices to expand your professional experience and effectiveness!

Dr. Spady puts major, significant emphasis on authentic assessments that far exceed current educational grading systems and provides readers with explicit guidance for implementing them. These authentic OBE assessments require specific criteria that: 1) truly reflect the creativity, innovation, and mastery of the learner, and 2) transform our educational system into one that fully promotes and extends human potential and performance! The book is a stunning example of how a fellow educator has refined and advanced already powerful ideas over several decades to the benefit of all learners and the system itself." - **Dr. Janet Jones**, Founder, Millennial Minds; Director; Vision Into Action Associates; experienced OBE implementer; USA

"I am a national advocate for successful learning for ALL of America's students and have long marveled at the brilliance, creativity, and commitment Bill Spady has brought to Outcome-Based Education and its central place in this never-ending mission.

Researcher, philosopher, sociologist, historian, thought leader, humorist, and internationally recognized educator, Dr. Spady takes us on a compelling 40 year journey from "educentrism" to deep learner empowerment, and from testing mandates to "real" life-performance capacities. This book should be a 'MUST-READ' for every parent, educator, and policy maker in this country because our educational thinking and practices are trapped inside an Industrial Age paradigm, and Dr. Spady's insights give us a way out. His blueprint is not just about policy, research or practice; it's about the power of self-directed learning, self-governance, equity, and democracy itself." - **Arnold Fege,** President, Public Advocacy for Kids; USA

"If you think you know what Outcome-Based Education is, or you have doubts about it, you have to read Chapter 5 of this amazingly insightful book. It's called, "Stop Calling It OBE, Unless It Is." I fully agree with Chapter 5 because I live in a country that's been a poster child for its message. Our National Department of Education remained mired in ALL TEN of the factors that Spady astutely calls **'The CBO Syndrome',** and it refused to heed his input and change its unworkable policies. They, like similar departments in other countries, insisted on calling their ineffective CBO policies "OBE," and the rest of the sad story is history. Local educators, however, were eager to learn everything they could about authentic OBE practice.

If you really want to learn about Outcome Based Education and its continuing evolution, you should read all of this book's deeply informative chapters. Very simpy: the exciting life-performance frameworks and models Dr. Spady describes are extremely enlightening. I worked diligently at Bill's side for several years, explaining the concept, training a capable team of OBE facilitators, and bringing the 'real' OBE message to the country. As an evolving futurist, I strongly endorse the book to anyone wanting a roadmap

for educating our young people for the dramatically dynamic future they face. That's the legacy Bill and his OBE colleagues will leave the world. They, like the transformational example described in Chapter 10, know that our current outmoded system can't do it without the significant guidance this book provides." - **Desmond Collier,** Owner-Director, Collier's Corporate Communications; OBE expert; South Africa

"This is a genuinely awesome book! It carries a coherent message of transformation, hope, and empowerment to parents, educators, and leaders across the world by dramatically expanding our beliefs about learners, learning, and how best to educate. I've devoted my long career to that end, and welcome such a bold, articulate statement from such a kindred spirit.

In short, Outcome-Based Education (OBE), as Bill Spady portrays its essence and evolution, turns everything we've been doing in education for the past two centuries on its head – all for the better!! More importantly, Dr. Spady shows how and why implementing authentic OBE can be done **more insightfully and powerfully than most people have ever imagined** because it's **'common sense'** buried under mountains of 19th Century cultural beliefs, capabilities, and practices. That alone should inspire everyone who cares about educating **all** children for a viable, empowering 21st Century future to examine every chapter of this remarkable book.

It's NOT what most schools are doing now, but Spady explains how we can do it the empowering OBE way, IF we choose. Otherwise it's business as usual masquerading as educational 'reform.'" - **Alan Rowe,** Vice President, Community College - Institutional Effectiveness (ret.), Life Coach, Education Consultant

"In this latest literary and culminating masterpiece, Bill Spady outlines ways to escape *educentrism* – education's syndrome of Industrial Age characteristics and operations – and to achieve life performance learning and deep student empowerment. In it he describes and explains the momentous awakenings that occurred over decades of his remarkable career of impactful academic contributions and international OBE influence on several continents.

His work continues to bring an untold wealth of practical knowledge regarding educational reform for establishing a culture of authentic student empowerment in academic learning. The opening chapters expose the severe limitations of *educentrism* and highlight the major differences between Curriculum Based Outcomes (CBO) and 'Real' OBE. His treatment of this issue alone makes this a MUST READ BOOK for educators and university students everywhere, especially those in international Quality Assurance agencies, Ministries of Education and other key regional and international academic organizations that aim to establish education based on outcomes.

Notably, Spady uses his sociological insights to explain how the current system of schooling leads to institutional inertia that counters the very changes most needed today. His deep, big-picture view of meaningful educational change challenges the time-based credit-hour paradigm that drives 'modern' education systems. That paradigm, he argues, is based on a bureaucratic-age culture, industrial-age delivery system, agricultural-age calendar and feudal-age agenda – not on 21st Century realities." - **Wajid Hussain,** Director, Quality & Accreditation, Faculty of Engineering, Islamic University, Saudi Arabia

"William Spady's empowering life-performance approach to Outcome Based Education has had a far-reaching impact on my work as a veteran teacher of special needs students. It has shifted my students' perspectives and identities from being 'children who can't'

to 'young people who CAN' – both learn and become contributing people in their families and communities. Those who think that OBE is about standardizing curriculum, teaching, learning, and learners are seriously mistaken. It is exactly the opposite, which is why this book should be read by every educator and parent who wants more from education and children than test scores that satisfy backward-looking policy makers and officials. From cover to cover it is an inspiring 'education' for us all." - **Pamela Candido,** International Special Needs Consultant, Teacher and Trainer; Permaculture Expert; U.K. and South Africa

DEDICATION

To the memory and spirit of the champions of Outcome-Based Education,
known and unknown, honored and overlooked, who used this concept
to expand humanity's awareness, elevate its vision of the possible,
and forge a lasting legacy on which educators can proudly build.
May their contributions to human evolution inspire
future generations of champions who seek
the best for children and the
world they will create.

Outcome-Based Education's Empowering Essence
Elevating Learning for an Awakening World

Dr. William Spady

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FOREWORD

This book is a true marvel. It should be read by every teacher, administrator, politician, teacher educator, environmentalist, business leader, entrepreneur, parent, grandparent and member of the public. It is truly time to change our outdated approach to education and encourage and allow the future to emerge. This book shows us how to do that, which is why it is a gift to every adult, parent and anyone even remotely interested in how to educate our children for the future they will face. It answers the question:

What can WE do to assist our children to live more consciously, creatively, collaboratively, competently, and compassionately than our own generations display?

I urge the reader to read this remarkable book deeply and carefully as they find hope for our children and grandchildren.

My co-author and late husband Geoffrey Caine and I together wrote over ten books on education, focusing on the role of technology and neuroscience in learning. Several of those books were considered cutting edge. Prior to his death, this was the book we wanted most to write, but Dr. Spady has beaten us to it. We wrote as psychologists, joyfully sharing what we were beginning to understand about how human beings learn, while Spady uses his background as a sociologist to explore similar issues from far more comprehensive social and educational perspectives.

Dr. Spady begins by taking a hard look at what is currently seen as education, where learning is tied to narrow outcomes that are based on credits earned, meaningless grades and externally mandated standards. Using a fragmented curriculum driven by convention, compliance, convenience and the demands of time, we largely bypass student initiative, creativity and capacity for exploring and engaging their greater capacities.

Then he asks us to move beyond such deeply embedded views and practices tied to another century and time. The question many educators have asked is whether it is even possible for teaching tied to such deeply embedded beliefs and actions to make room for a broader more inclusive view of human potential? How might educators create learning environments that allow students to experience the curriculum through rich, more natural experiences that provide opportunities to directly engage with life while learning new skills and deepening their understanding? This new approach to instruction is inevitably complex, unpredictable and "messy".

Nonetheless, step by step he introduces us to a new vision for, and practice of, education that honors and unleashes individual talent, uniqueness and potential in every learner. As a passionate designer and developer of Outcome Based Education, he is convinced that every child can learn if we are prepared to finally let go of the tightly structured conditions and teaching methods that were developed for, and belong to, the 19th Century. Guided by this new vision, he shows us how we can truly have a top-class education for every child. He does this by documenting a remarkable journey of discovery, understanding, and work that spans five decades.

Dr. Spady provides us with numerous examples of how "out of the box" thinking and practice are essential to moving education forward. He helps us understand that this carefully defined and evolving version of Outcome-Based Education relies on a comprehensive

view of human capacity based on a powerful new philosophical foundation grounded in research on learning and a revolutionary new understanding of science. This new understanding invites us to see ourselves and the universe through a far more expansive lens. Given the greater understanding of learning now available, educators have a clear choice: comply with, and remain in, education's restrictive obsolete practices, or move forward and create something totally different and new. For the latter to unfold, we first need to actually see things differently by changing our lenses and recognizing that we are always dealing with a whole human being. Spady advocates this greater view. He argues that, by implementing the current advanced version of Outcome Based Learning, every student and adult can ultimately develop and master qualities like compassion, cooperation, creativity and living consciously while at the same time mastering productivity, accountability, flexibility and adaptability.

But learning from authentic contexts has to be addressed and optimized, as in the example of Iowa BIG, presented in Chapter 10. BIG's empowering environment fosters purpose, enthusiasm and personal involvement where students continually journey towards both deeper understanding of relevant matters and greater performance in dealing with them. BIG encourages students to discover their uniqueness, talents and passions and offers them continuous possibilities for applying academic content, honing complex skills and reflecting on personal learning in action. In this way, both faculty and students master the individual skills that underlie BIG's key goals: Complex Communication, Productivity and Accountability, Critical Thinking, Creativity, Collaboration, Flexibility and Adaptability. In short, students become self-directed learners, collaborative workers, complex thinkers, community contributors and quality producers.

Consequently, groundbreaking alternatives like Iowa BIG, and a parallel alternative called High Tech High in San Diego, are

extremely rare because they are inevitably undermined from within by the deeply entrenched old model of learning and teaching and old, narrow definitions of outcomes. Our work showed that whenever these two fundamentally different ways of educating clash, the new vision inevitably encounters resistance and misunderstandings that create conflicts within the larger system that typically embodies and embraces many outdated entrenched beliefs and practices.

Combined with the advanced version of Outcome Based Education and schools like Iowa BIG, Dr. Spady offers us an emerging blueprint for education's possible future and for equipping the next generation with the essential qualities and empowering skills necessary for their survival and potentially the survival of our planet. It won't be easy; the challenge is immense; and we need to begin to act now – no more excuses! Happily, this book gives us an insightful and compelling way forward.

Renate Caine, Ph.D.
Director, Natural Learning Research Institute
Founder and Director, Caine Learning

INTRODUCTION

Great Awakenings - Decade after Decade

I have been active in the development of the Outcome Based Education (OBE) movement in North America and the rest of the world from its earliest days. I believe that the existence, implementation, and evolution of OBE's global scope and today's inspiring examples emerged out of six moments of great insight and awakening:

1. John Carroll's 1963 paper on aptitude as **rate** of learning, not ability to learn.
2. Benjamin Bloom's translation of that insight into the 1968 Mastery Learning model.
3. Defining what a learning outcome really was and implied in 1986.
4. Becoming future-focused and expanding the concept of 'life-performance learning.'
5. Awakening to the merits and power of self-directed student learning in the 1990's.
6. Recognizing and addressing the depth and breadth of human potential in the 2000's.

This book explains the significance, potential, implementation, and implications of each of these six moments. Of course, countless other insights, developments, implications, and paradigm shifts were woven into this dynamic tapestry, but it would take another much longer book to describe them all. As you explore these great

awakenings with me, please remember: This book is about **'real' 21st Century OBE**, the kind that gets kids to an empowering future. It's not testing mandates, and it's not what some people have been claiming that OBE is. That's CBO – Curriculum Based Outcomes – and a host of other CBO's explained in Chapter 5. The kind of OBE from Chapter 6 onward embodies how aware, 21st Century citizens think about learning, learners, and life itself, and I'm proud to be sharing their, and my, perspectives and work with you.

As you explore these six awakenings with me in the book, note that it took about 20 years for just the first two points to take hold and unfold before we finally awoke to the third. Clearly, we OBE pioneers were highly motivated and wanted to implement its "Success for All Learners" philosophy and operating principles wherever we could, but our progress was slow. Why? Largely because all of us who led and contributed to the OBE movement were stuck in a paradigm I call ***educentrism***.

Educentrsim

Educentrism is my word for a self-reinforcing, closed system thinking about, and functioning in, education based on past experience. That experience is ultimately grounded in 19th Century Industrial Age knowledge, beliefs, metaphors, and technologies. As university graduates, all of our past educational experience lay **within** that existing closed system. Therefore, our initial goal was to **greatly improve** how that system operated, not to **transform** it. Like everyone else, we accepted this **educentric** system and all of its fundamental Industrial Age characteristics and operations as **givens,** and we **based** our thinking and implementation models on that paradigm. Breaking out of the ***educentric*** mindset and operational inertia was enormously challenging and difficult for us – just as it remains for today's educators, parents and policy makers. They went to the same kinds of schools and universities we did, only a few decades later.

As a concept, philosophy, model, and paradigm, we knew that 'real' OBE held incredible promise for all of its stakeholders. And we also knew that its amazing promise would only be fulfilled when those very stakeholders no longer accepted and reinforced ***educentrism*** and its obsolete 19th Century legal, political, institutional, cultural, social, and psychological grip on everyone. That meant, and still means, overcoming its enormous cultural and institutional inertia, and we're still optimistically helping people address that challenge today.

Paradigm-Shifting 'Spadyisms'

In the earlier days of this five-decade journey, I began writing down and actively communicating to audiences many of the little ideas, paradoxes, catchy sayings, and concepts about both OBE and ***educentrism*** that came to me. This went on for years. Some of them ended up being real 'attention grabbers' and would remind educators that there were different and more effective ways of thinking about and doing things than just surrendering to their traditional practices and saying, "We've always done it this way before." After some months of exposure to these little sayings, my colleagues jokingly started calling them **'Spadyisms'** and began quoting them in their work as well.

Since many of them are fun and really get you thinking, I'm going to introduce you to 'real' 21st Century Outcome-Based Education via a few dozen of my most 'famous and infamous' ones. Hopefully they'll entice you to engage deeply with the great awakenings that happened for us along the journey that unfolds in these chapters. These great awakenings and many of these Spadyisms have led to the impressive, outside-the-box frameworks, models, and schools described in this book. Those transformational examples are real eye, mind, and heart openers, and I know you're going to be impressed.

Some Famous and Infamous 'Spadyisms'

The Spadyisms listed below are grouped into loosely related themes. Whenever I use a saying in my 'Transformational OBE' presentations, workshops, and seminars, I explain its relevance and importance in great depth. Some are self-explanatory; others require much more explanation. Take your time with them and sense the deeper message each is sending. And please come back to them occasionally as you read the book. I assure you; they all awaken people out of the assumptions that accompany and reinforce ***educentrism***, and they stimulate creative thinking – the heart of Outcome-Based implementation. Have fun!

CBO is Not OBE

They don't give B- Merit Badges or C+ Karate Belts

Nothing is 'Worth' 100 points – We make up the Numbers

I don't want my pilot getting an **80** in landing!

The 'Bell Curve' is the 'normal' result of poor teaching

If you want to 'cover more material', use a bigger blanket

Everything in education is defined by How Long it's supposed to Last

When YOU Run Out of Time, THEY Run Out of Opportunity

Opportunity Ends When You Get Graded In Ink

If Everything is Your Priority, Then NOTHING is Your Priority

A self-contained classroom is a SELF-CONSTRAINED classroom

By Their Verbs Ye Shall Know Them

Outcomes Matter After They're Gone

If you give them the Final Exam on Day 1, they'll learn it

You Can't Assess What You Haven't Defined

Your GPA is the grand average of All the Mistakes you've ever made

Ban The Law of Averaging

God forgives – GPA's don't!

You Can Average Scores, But You Can't Average Outcomes

Stop Grading Everything that Moves

For a longer list of Spadyisms, go to my website, www.williamspady.com/OBEbook

And now for the details. Happy reading!

An Orientation to the OBE Paradigm

This short book is not an implementation guide or hands-on workbook about Outcome-Based Education. It's a concise description of an educational model/philosophy/approach/practice/possibility/paradigm that is time-honored, tangible, common-sense, powerful, and life-changing if carried out authentically. When approached with an open mind and heart, OBE will expand your thinking about education, perhaps so much that you'll want to change it – **really** change it.

My colleagues and I would welcome that and applaud you for your insight and courage because changing anything in education requires both. We know that implementing OBE authentically will require lots of both, and more, but it will be worth it. Visions will expand, learning will deepen, success will manifest where frustration and doubt prevailed before, and lives will reflect a greater sense of purpose and fulfillment.

Why, then, does this short book require an 'Orientation'?

> ***Is the content about OBE too abstract to understand?***
> NO. Countless examples of authentic OBE exist in the 'real world'.
>
> ***Are the issues surrounding OBE too complex to comprehend?***
> NO, but you must stop thinking about 'school' to see how clear and concrete OBE is.

Is the material about OBE too unfamiliar to grasp?
NO; you just have to keep an open mind and recognize the 'common sense' in it.

Is there some special way of approaching the issues that define and explain OBE?
Well, MAYBE. You would be wise to put yourself in the shoes of someone who has to demonstrate/perform something real

There's nothing about Outcome-Based Education (OBE) that's difficult or obscure if you're familiar with Merit Badges in the Scouts, Belts in Karate, SCUBA Diving qualifications, Ski School instruction, performing in a quality music or dance ensemble, or even PARENTING! They all have remarkably similar features when you get down to their essence, and they're all Outcome-Based. So are most other performance-oriented kinds of training or education in the 'real' world.

Then why an Orientation? Well, for starters, you can read this; which means that you've had 'an education' in a 'modern' educational system sometime in the past several decades. If so, I'm willing to bet that you got quite accustomed to how that system operated, what it expected of its 'players' if they were going to be successful, and how and where you personally fit into all of that. In fact, if you were a good student in that system, almost everything about it came to 'make sense' and support your success. Very simply, you got **'socialized'** into that system so that you COULD succeed in it. So did I, and countless other people who make up the 'backbone' of our society.

When We Have 'Paradigm Blindness'

So, again, why is an Orientation to this book necessary if it's about education, and you're already completely familiar with the topic

because you've spent at least sixteen years of your life functioning well in it? That's surely long enough to get totally familiar with and oriented to something. Yes, it is and it's more than enough time to induce something that visionaries and change-leaders call 'PARADIGM BLINDNESS' – when we **'Can't See the Forest from the Trees,'** and things like that. Why? Because we're SO VERY ACCUSTOMED to them that we:

- Take 'obvious' things for granted,
- Give things meanings and values they may not actually possess,
- Perform actions until they're 'automatic routines', etc., etc.

We all do these and other related things because functioning harmoniously in social groups generally requires it.

Are these particular items the only alternatives open to us? NO, they're simply the ways that a particular social system operates and governs itself. We've grown SO VERY ACCUSTOMED to them that we accommodate ourselves to them, often quite unconsciously. When we do, we receive affirmations and positive feedback of various kinds about our roles and behaviors in that system, and we learn what the members of that system **believe**, **value** and **prefer** – further deepening our Socialization.

'Education' from a Paradigm Perspective

So, let's extend our Orientation to this book about OBE by introducing the most fundamental concept in it: PARADIGMS. Yes, the word has become quite popular these days, but it's so OVERUSED that it has lost its fundamental meaning.

A Paradigm is not just a way doing something or your opinion about it. It's about the REALITY you've created for yourself by becoming totally Socialized into a given way of seeing and doing life. It's your

most fundamental beliefs about what DOES and SHOULD exist – about what's POSSIBLE or IMPOSSIBLE, about GOOD and BAD, WHO and WHAT YOU ARE as a living being, and the ways you RESPOND and ACT accordingly. Ultimately, it's about how you perceive LIFE and DEATH and how those viewpoints shape your thinking, speaking, and actions about everything.

That's why Paradigms are 'VERY SERIOUS STUFF' and aren't to be taken casually. They're so serious that an Outcome-Based paradigm of education is profoundly different from a 'conventional' one, and that's what we'll explore together throughout this book as that difference expands and evolves.

Our Consensus Meaning of 'Based'

What makes them so different? The word 'BASED'. It routinely gets overlooked, but for OBE's early champions it meant:

Defined by, **Focused** on, **Designed** around, and **Organized** around – something.

Basing what you do on something means that that 'something' strongly shapes your REALITY of it – your Paradigm of what it is, how it operates, and what governs it.

In the case of the education system you and I attended for so many years, that 'something' isn't Outcomes, Curriculum, or Learning. It's TIME; and that's absolutely different from either of those three. Please let that sink in for a minute because it's fundamental to understanding everything else in this book. And don't let it discourage you from reading further because I'll be saying much more about it shortly. EDUCATION IS TIME-BASED. It's defined by, focused on, designed around, and organized around the clock, schedule, calendar and the time blocks they create. That's education's reality, that's its Paradigm, and that's the school you attended.

Let's agree that just because Outcome-Based Education is different from the Reality you've experienced education to be, its differences aren't threatening, controversial, or hard to accept. Actually, OBE is PURE COMMON SENSE if you want all learners to succeed and flourish at what's important TO them and FOR them to learn.

The twelve chapters in this book reveal how insightful OBE researchers, educators, and facilitators have addressed and implemented this simple common-sense reality over the past five decades – on five different continents. We've had to make major PARADIGM SHIFTS of our own along the way – usually by trial, error, and lots of frustration. That won't happen for you because you've now had a taste of two critical words that initially made it so difficult for us: Paradigms and Based. Coming to understand and appreciate their power made all the difference.

So, before moving on I recommend that you review and reflect on everything in this short Orientation as many times as you require. If you're willing, make a list of all the things you now think define Education's Reality and keep it handy as you explore OBE with me in these pages.

Remember: OBE's champions want ALL learners to learn, thrive, and be empowered in their lives. I think you do too, so join me and learn how this transformational model/philosophy/ approach/ practice/possibility/paradigm continues to evolve and bring enlightenment to the world five decades after its inception! It's been an amazing ride!

PART I

OBE's Basic Paradigm Shifts

CHAPTER 1

OBE and the 'Business of Paradigms'

All technologically advanced countries in the world have educational systems with defined structures that shape them, with beliefs and processes that uphold those structural forms. Almost all of these systems were derived and developed in the past two centuries from a few Western European models several generations before today's technologies, knowledge bases, and deeper understandings of the brain and humans' capacities first emerged.

In the U.S. those original, limited forms, beliefs, understandings, and processes were reinforced late in the 19th Century by layers of laws, regulations, and social customs, giving us the ***institutional template*** of our 'modern' system. That structural template has been almost impossible to change (or escape from) no matter how much the world around it has changed.

Why the resistance to change? History shows that once an institution has been in place for a couple of generations, its features and practices become ***internalized*** in the minds of its participants, who both accept and believe that its form and functions are **'the'** way to do things. They become 'socialized' to it, as we've already seen. Those who benefit most from this systemic template usually go to great lengths to keep it intact in its prevalent form. Consequently, there are few forces, within or without the institution, to challenge its form or how it operates. Sociologists like myself often refer to this as a '**closed system'** and call this fixed way of viewing and doing things a **'paradigm prison'**.

Our Factory-Model Template

The highly revered template that shaped the institution called 'education' in the U.S. was the **assembly-line factory**. Viewed by many over a hundred years ago as the key to economic progress and prosperity, the **assembly-line factory** became the organizational exemplar of the Industrial Age. Since its orderly, standardized processes were deemed ideal for producing uniform quality products, it only took a small leap of imagination to project those same virtues and expectations onto schools – especially since the **orderly scheduling** of processes and functions allowed schools to 'handle' and manage the masses of children entering its doors in the late 1800's.

The cultural and legal inertia surrounding this time-based factory-model template are alive and well across the world, and education has become its own self-defined and self-reinforcing PARADIGM – literally ***a fundamental way the world, the self, and 'reality' are viewed, manifested, and pursued***. As noted in the Orientation, I have always taken both the concept and this definition of a 'paradigm' seriously, ever since I first heard about OBE's defining features late in 1967. I Immediately understood OBE to be distinctly different from the **'educentric'** one that prevails today, and I invite you to discover why I came to that conclusion.

Barker's View of Paradigms

My understanding of Paradigms parallels the impressive legacy established decades ago by the eminent futurist Joel Barker. In his famous video ***The Business of Paradigms*** (1980), Barker explains that a Paradigm is the way you **view** and **do** everything. It is your interpretation of what exists and, therefore, **what is possible**. Your paradigm is the **frame of reference**, or worldview, that you live within. It contains what you see and believe as TRUE, and that

'TRUTH' represents your REALITY. In short, Barker and I agree that:

> **A Paradigm is your picture of what exists, what's true, what's right, and what's ultimately possible.**

So, if paradigms are literally the **realities** we live within and the picture we hold of what is fundamentally true and important, they are not simply our temporary opinions of things and surely should not be regarded casually. When they **'shift',** so does our understanding of ourselves, how things work, what we believe and value, and how we behave to reinforce those beliefs. Since people often defend the validity and legitimacy of their paradigm to such levels of vigor and violence that the result is WAR and DEATH, neither of us treat them casually at all.

The Good News about 'Going Back to ZERO'

Moreover, when I think of paradigms and paradigm shifts, Barker's famous saying always comes to mind:

> ***"When a paradigm shifts, everyone goes back to ZERO."***

Well, to me ZERO sounds frightening and feels disorienting and dangerous because Zero implies that your familiar frames of reference have disappeared, and you've lost your bearings. Things that have had enormous meaning and importance are diminished or have lost their significance, and you must start comprehending things anew. Moreover, the things on which your identity and feelings of efficacy rest may now be challenged, and you're faced with having to redefine yourself and start over, or so it seems.

And so, while that's one way of interpreting Barker's observation, there's another, and that's the good news of paradigmatic change.

ZERO is also what some philosophers regard as the **'point of creation'** – when you are **free** to **choose, view** and **do** things in new and fundamentally different ways, unencumbered by previous beliefs, assumptions, habits and behaviors. Suddenly, they suggest, you realize that old, familiar patterns are ***not*** the ***only*** choices available to you, no matter how habitual and ingrained they may be. So Yes, ZERO pushes you into the *unknown*, but that place of total mystery and uncertainty is where you find true *creativity* and invention, and that's what OBE represents.

Going Back to Education's ZERO

So, let's go back to ZERO together and take a deep, fresh look at education's most fundamental assumptions, structures, and processes. If you get shocked and amazed along the way, please stick with me, because I too was shocked and amazed when I was first introduced to OBE's most basic 'realities' back in 1967 by a young colleague I had encouraged to do doctoral studies with the famous Benjamin Bloom. His name was James Block. We were from the same hometown in Oregon, and in about an hour he gave me a paradigm-shifting, life-changing 'education'.

Yes, I was shocked and amazed by what Jim explained, and Yes, I argued back! Why? Because everything that I had accepted about education was suddenly put under a conceptual microscope, and it exposed my **paradigm blindness**. Just like everyone I had ever met or known, I had failed to really 'see' that:

Education is TIME-BASED!

Thanks to Jim, I suddenly awoke to a new reality: That everything in 'modern' educational systems was defined or measured by **TIME BLOCKS and how long they were supposed to last**!! One after the other I realized that:

school years . . .
then **semesters** . . .
then **grade levels** . . .
then **courses** . . .
then **credit hours** . . .
then **class periods** . . .
then **promotion schedules…**

were all Time Blocks that are governed rigidly by **the clock, schedule**, and **calendar.**

On and on my list went – everything about the curriculum, instruction, learning standards, credit, athletic seasons, games, and faculty contracts was stated in laws, rules, and regulations about **when everything should start and end**, and in how many **minutes, hours, days**, and **weeks** they should be measured. And that realization put me into a state of conceptual shock.

As noted in the Orientation, my sociological training asserted itself and my mind shouted at me: "How can a system be simultaneously BASED on two profoundly different things: TIME on the one hand, and learning OUTCOMES on the other? One or the other of them would have to be the system's operational **priority**, and from all that I could perceive then, **Time** was going to win out. That incredible moment of ZERO not only shifted my paradigm thinking about education, it also set my career on a fundamentally different path – one that I've been on for nearly fifty years.

Exposing the Fundamentals of 'Educentrism'

From my perspective, the paradigm of today's prevailing system of education embodies and embraces the following **deeply imbedded** cultural assumptions and understandings:

1. Humans are distinct physical creatures, separate from each other and from their environment;

2. Information, knowledge, and their meaning lie outside of the individual in some kind of culturally understood and endorsed context;
3. The **more** detailed, precise and complex this information, knowledge, and meanings are, the more each element can be separated and distinguished from other elements, and the more value it has;
4. The function of education is to infuse these material elements and their related concepts into the linear/logical processing functions of individuals' brains;
5. This input is called **learning**, and the capacity to assimilate it quickly and retain it readily and accurately is called **intelligence**;
6. The **more** of such learning that humans assimilate and demonstrate, the more educated, expert and superior they are considered to be as individuals, and the more valuable they are to society;
7. The **faster** humans learn in this way, the more intelligent they are deemed to be, and the more valuable they are deemed to be to society;
8. This linear, logical, cognitive way of experiencing and learning represents the **ultimate** stage in human evolution and the **pinnacle** of humanity's development;
9. Any other way of experiencing and interpreting life and existence lacks credibility and lies outside the purview of legitimate education.

What follows from these assumptions is a way of educating that places enormous emphasis on learners' abilities to understand in order to duplicate the system's clearly defined and accepted methods, standards, and processes, while downplaying the significance or relevance of other ways of perceiving, experiencing, and relating to

all that exists in our universe. Although the structural and deeply institutionalized forms of such systems vary somewhat from country to country, in the main they are organized around:

- **Fixed** roles and statuses for those defined as teachers and students;
- **Fixed** lines of authority and rules governing both;
- **Fixed** age-level and/or 'ability' grouping of students;
- **Fixed** areas of content (called curriculum) to be assimilated;
- **Fixed** places to learn (called schools and classrooms);
- **Fixed** time blocks and schedules governing instruction and learning;
- **Fixed** ways of assessing, labeling, and ranking students' learning;
- **Fixed** criteria and times for sorting or advancing students through the system; and they form an institutionalized paradigm I call ***EDUCENTRISM*.**

Yes, while all of ***educentrism's*** defining system structures and operations are **fixed**, the learning success of students is **highly variable**, looking like, or forced into the shape of, a **bell curve**. As we'll see in Chapter 2, the bell curve of learning results is NOT NORMAL to John Carroll and Benjamin Bloom. They gained eminence challenging it.

CHAPTER 2

Escaping Our *Educentric* Paradigm Prison

On a significant paradigm-shifting day for me late in 1967, my friend Jim Block explained to me that an insightful scholar named John Carroll had published a paper in 1963 called **"A Model of School Learning", published in Columbia University's Teachers College Record.** It was a theoretical analysis of the **fixed** nature of schooling and drew several conclusions about why typical patterns of school learning resembled a bell curve. Carroll's paper and perceptive understanding of what people were calling *aptitude* struck a chord with the famous Benjamin Bloom, whose breakthrough work I'll describe shortly.

John Carroll's Paradigm-Shifting Insight about Aptitude

Aptitude, Carroll said, is NOT one's ***ability*** to learn something; it is the ***rate*** at which a person learns it. Therefore, he argued:

> **What** students can learn to do is far different from **how fast** they learn to do it.

Education systems, he explained, assume that aptitude is ability, and that's both **simplistic** and **mistaken**.

According to Carroll, since schools give everyone the ***same amount of time*** to learn (in the name of "Equality of Opportunity"), those with faster rates succeed within those predetermined time limits, while those with slower rates do far less well, often yielding a distribution

described as a bell curve. This doesn't mean that the latter ***can't*** learn well, he argued; it means that the prevalent **fixed-time** model of schooling doesn't give them a fair opportunity to do so. Since those same students seem to learn most life essentials quite well when they're not in school, they clearly have the ability/capacity to learn well in life. It's likely, then, that their 'learning problem' lies within the school, not the child's capacity to learn!

What would happen, Carroll conjectured, if the school's learning conditions were **reversed**? What if learning outcome standards and expectations were clearly defined and ***fixed***, and time was allowed to ***vary*** consistent with a learner's aptitude? Wouldn't many more learners succeed at learning what schools define as important than do so now? Clearly Carroll had reached his moment of ZERO and lit a pathway in 1963 for educational change to follow.

My Daughter's Enlightening Question

Paradoxically, while a university student, my daughter Vanessa asked me a similar question to Carroll's some twenty-five years later:

> "Dad, why is Chemistry nine months long? Some kids can learn it in seven months, some in nine, and some, like me, need eleven. **It would be the same Chemistry with the same exams.** I know I can do it in eleven months, but I'm failing now that it's only nine. It's going faster than I can handle it. Why can't they offer an eleven-month course?"

My inadequate response to her went something like this:

> Courses and credit systems are ***time-based***, Vanessa. People think of courses as bodies of knowledge, but they're really pre-scheduled **nine-month events**. **When the time runs out, the course is over, no matter how much knowledge**

> **is still left to teach and learn.** Our time-based system has led educators and policy makers to believe that that's Okay.

But yes, I thought, that's quite a smart idea: Three identical courses, seven, nine, and eleven months long respectively. Really, why can't they do that?

Bloom's Response to Carroll's Paradigm Prison Break

It was into this **'fixed'** and inflexible paradigm of education that Benjamin Bloom introduced his Mastery Learning (ML) instructional model in 1968. John Carroll gave light to this 'Great Educentric-Paradigm Prison Break,' and Bloom was the first to actually break through the wall with a tangible model. Let's just assume that Bloom initially did it by replacing the word **'Fixed'** in most of the foregoing defining conditions with the word **'Flexible'** and then applying what he saw as possible from there. For example:

- **Flexible** roles and statuses for those defined as teachers and students;
- **Flexible** lines of authority and rules governing both;
- **Flexible** age-level and/or 'ability' grouping of students;
- **Flexible** areas of content (called curriculum) to be assimilated;
- **Flexible** places to learn;
- **Flexible** time blocks and schedules governing instruction and learning;
- **Flexible** ways of assessing, labeling, and ranking students' learning; and
- **Flexible** criteria and times for sorting or advancing students through the system.

That's not exactly what Bloom did, but it sheds light on the essence of his thinking. He described his own paradigm shift as treating time as an **Alterable Resource** rather than as a **Fixed Definer**. He also noted that the **bell curve** is only **'normal'** under conditions of RANDOMNESS, which is the last thing that good instruction should yield. Faculty are hired to transform randomness into intention and thereby skew any distribution to the 'high' side, indicating high rates of learning success. How his model did that becomes clear in the discussion below.

Making Mastery Learning Operational

To his credit, Bloom also added four important elements to Carroll's basic model. First, he argued that many 'slow' learners simply didn't have the ***cognitive prerequisites*** for what they were being asked to learn. Consequently, they struggled and took more time to learn new things because they didn't have the necessary background for it. In effect, they were being asked to learn the prerequisites and the new learning simultaneously – a double challenge. Many got discouraged or demoralized and eventually gave up altogether.

Consequently, Bloom focused the ML model on getting young learners onto a successful learning path, which included having teachers map and teach the essential prerequisites for that new process. This strategy was eventually embodied in one of OBE's four major principles: **Design Down** (**from Where You Want to End Up)**. That is, carefully build your curriculum 'back' from its culminating point to where you can safely start, assured that your students have the prerequisite knowledge, concepts, and skills to move forward successfully.

Second, he argued for making the desired learning outcome clear to students at the very beginning of instruction so that they had a

clear picture at the outset of where they were headed and what they would eventually be able to do successfully. In effect, teachers were to ***model*** what the desired outcome was ***before*** they began to instruct. This strategy was initially met with great resistance by teachers who thought that learning should be either a challenge or a struggle, apparently as it had been for them when they were in school. Eventually, however, this practice proved to be very successful and was adopted as part of OBE's first major principle: **Clarity of Focus on Outcomes of Significance**.

Third, Bloom advocated extending learning time for those who didn't do well on an **initial** test of the material, what he called a ***formative*** assessment. For Bloom this wasn't simply a matter of letting students work longer at what they didn't understand. Instead, the ML model emphasized:

1. Using the initial test to ***diagnose*** learners' mistakes
2. Having teachers use the test results to ***correct learning errors*** and employ a ***different kind*** of instructional strategy for any corrective work, then
3. Giving learners a ***second chance*** to take the test for **full credit**.

This too proved very controversial among educators who believed strongly in ***single opportunities*** for students to learn and be assessed on **fixed** calendar dates. Nonetheless, these three elements were eventually incorporated into OBE's second major principle: **Expanded Opportunity (for Learning Success)** and reinforced what I believe became the guiding paradigm shift of OBE:

> **WHAT and WHETHER students learn successfully is more important than WHEN and HOW they learn it.**

As we'll see in Chapter 3, this fundamental paradigm shift became the grounding element in the formal development of OBE as an integrated system, and it moved learning and instruction beyond the fixed constraints of the clock, schedule, and calendar.

Fourth, Bloom's ML model raised the conventional passing standard in U.S. classrooms from **70% to 80%.** Any performance below 80 was given an expanded opportunity to reach that level because his early research had indicated that 80% on critical prerequisites was sufficient for students to quickly grasp new material. In addition, Bloom wanted to show that slower learners could not only learn what faster learners had learned, but that they could do it at a higher performance level than had been expected of them.

Since research done by Bloom and Jim Block on ML yielded very impressive results, they initially persuaded a small number of teachers to use this strategy consistently. Since the learning results for their students got better and better, as did test scores in all basic skills areas for schools consistently utilizing ML, the word spread about ML's power. This fourth element – raising performance standards – eventually emerged as the third OBE principle, called **High Expectations for All to Succeed**.

Mastery Learning's Indelible Impact

The Mastery Learning model clearly shed light on, and challenged, education's structural and operational paradigms in many ways, and, thanks to the dedication of Jim Block in particular, it led to the birth of the Outcome-Based Education movement in the U.S. and Canada. At the classroom level ML embodied the mega paradigm shift governing instructional intention and practice that has guided the thinking and design work of OBE implementers from the earliest days until now. With the impressive results that various

Mastery Learning classrooms and schools yielded, you would think that educators would rush to implement it. Not so. It took a decade for momentum to build, and even then, implementation progress was slow.

Overcoming Education's Entrenched Syndromes

Why? Because everywhere ML trainers and implementers turned, they encountered what they called **'entrenched traditional instruction'**. Ironically, at the time I called these practices **"The Seven Deadly 'SYN-dromes'".** (Notice the intentional play on words.) These 'SYNdromes' virtually guaranteed the bell-curve learning results that John Carroll had confronted, and Bloom wanted to eliminate. What were they?

The Year-Book – Making sure you (the teacher) get to the end of the textbook by the end of the year, whether the students learned well or not.

Blanket Coverage – 'Covering the Material' is no match for effective instruction.

Mystery Learning – If students don't know where they're expected to arrive, they're bound to get lost getting there.

Premature Evaluation – Testing students when you know they're not ready to succeed.

Surveying the Damages – Counting up the casualties from the Premature Evaluation.

The Law of Averaging – The Great Distortion: Mixing early mistakes with later successes.

Permanent Ink – Students: Please know that every mistake you ever make will be held against you . . . forever on your permanent record of averages!

What these SYNdromes reveal is the 'dark side' of what we came to call **"The Conditions of Success."** They are the conditions that either **impede** student learning success or **foster** it, depending on how they are defined and implemented. Bloom's model blazed the trail of **defining** and **expanding** them, mainly by:

1. Shifting educators' focus from the curriculum they were teaching to how well their students were actually learning, and
2. Having teachers take a variety of common-sense steps to assure that students eventually did learn well.

Birthing the Network for Outcome-Based Schools

Despite these enormous obstacles, and after a decade of painstaking effort, Mastery Learning's early champions like Jim Block eventually built enough momentum around this model to form a small group of committed trainers, practitioners, and leaders which officially named itself the **Network for Outcome-Based Schools** in 1980. The Network formalized the 'OBE' name, gave OBE extensive national recognition in the U.S., held national and regional conferences about OBE's effectiveness, and established an authentic movement around OBE's **"Success for All Learners"** Philosophy.

Most importantly, the Network used the key elements in the ML model to formalize OBE's **Paradigm, Purposes,** and operating **Principles.** Those key components have been upheld over the decades and represent the **ESSENTIALS** of any educational system that claims to be **OUTCOME-BASED**. My view: If you're

implementing **all** of those essentials, your claim is valid. If not, you have more work to do. You can check them out in detail in Chapter 3.

CHAPTER 3

OBE's Philosophy, Principles and Power

Well-developed models of Outcome-Based Education have yielded an impressive array of results or it would not have survived as a viable concept and operational paradigm for fifty years. These gains and improvements can be attributed to the convergence of four major conditions that are keys to students' learning success:

1. When educators develop a clearly defined framework of learner **Outcomes** on which they **Base** everything in their instructional and assessment systems;
2. When educators espouse and implement OBE's 'Success for All Learners' **Philosophy** and its four synergistic **Pillars of Power**;
3. When educators align and integrate these two factors with OBE's substance-based, criterion-defined **Foundation** of learning and performance **Standards**; and
4. When educators significantly shift their **Paradigm** thinking, **Priorities,** and operations from being **Time-Based** to being **Outcome-Based**.

Then, when all four of these factors are implemented **Consistently, Systematically, Creatively,** and S**imultaneously**, there is an enormous expansion of these **'Conditions of Success'** for learners of all ages and educational levels, and remarkable gains in learning and performance can occur. So please make a special note of this:

There is a **powerful synergy** when all four of these Conditions of Success converge and are consistently, systematically, creatively, and simultaneously implemented – especially 'creatively'.

Condition 1: Outcomes of Significance

Although there is great misunderstanding about this across the world, an Outcome is a '**Culminating Demonstration of Learning**'. Chapters 4 and 6 elaborate on this definition and explain its deeper implications, **so please don't draw premature conclusions about what Outcomes are.** There you will discover that:

- Demonstrations are tangible actions defined by **words**; **not** scores, points, and averages;
- Demonstrations require skills and **competence**, **not** just content and memory;
- Outcomes happen **'at or after the end'** of students' careers in school or university;
- Outcomes of Significance matter **'after they're gone'** – in their future life;
- Performances are three-dimensional because **context conditions** really affect them;
- Context drives the Competence and Content that performance requires;
- Demonstrations take many **forms**, including a range of life-role performances;
- Role-performances are complex demonstrations that **all** students can carry out; and
- Life-Performance Outcomes are about 'Total Humans' and 'Total Professionals', **not** just kinds of curricula or skills.

When implemented well, each of these **defining attributes** magnifies an Outcome's impact, significance and lasting benefits, so please study Chapters 4 and 6 carefully.

In the meantime, please remember that **Outcomes are NOT scores, points, and averages**! I will say more about this in the Epilogue that concludes the book and invite you to participate in a program I will be offering on ***Outcome-Based Assessment and Grading*** and all of the complex issues that surround them.

Condition 2: OBE's 'Success for All Learners' Philosophy

People often ask me whether OBE is a model, a paradigm, a philosophy, a system, a technique, or a design strategy. My answer is: YES, it is all of them. OBE is best understood as an ever-evolving, fully integrated **constellation** of all of these phenomena (and more) because each of them provides a different avenue for viewing and approaching OBE's **very holistic way of enlightening and empowering learners.** And while I have just traced its contemporary 'roots' to Carroll and Bloom, the essence of OBE has been with us for **thousands of years**. Yes, **thousands of years** because its essence is practical and common sense, and humanity has relied on it for millennia in order to pass needed skills and knowledge on to its youth, basically to assure the survival of the species.

What makes OBE 'different' from today's conventional education is that its compelling energy resonates from its unique philosophy: **OBE practitioners *want* ALL learners to learn well and to be treated as successful human beings. Therefore, they decisively *act* accordingly.** That's profoundly different from wanting to sort, and rank, and label, and select, and reward students and their institutions according to how much better they appear to perform on often questionable 'measures of achievement' than others. And it's why

OBE has consistently sought to EXPAND these Conditions of Success for all students. Here's how that unfolds.

The strength, credibility, and impact of OBE's 'Success for All Learners' **Philosophy** rest on the integrity of four tightly integrated, synergistic **Pillars of Power.** They're known as:

OBE's **Paradigm** Priority

OBE's Two Empowering **Purposes**

OBE's Three Underlying **Premises**

OBE's Four Operational **Principles**

Here, succinctly, is how they work together to creatively strengthen and expand all four Conditions of Success.

1. **OBE's Paradigm Priority** makes:
    - **What** and **Whether** students learn successfully more important than **When** and **How** schools schedule and provide instruction and assessments.

2. **OBE's Two Empowering, Future-Focused Purposes** commit educators to:
    - Maximize the **'Conditions of Success'** for all learners
    - To send **fully equipped** and **empowered** graduates into the world.

3. **OBE's Three Underlying Premises** express educators' beliefs that:
    - **All students can learn and succeed** (but not on the same day in the same way);
    - **Success breeds success** (just like failure breeds failure); and

- **Schools control the 'Conditions of Success'** (and can expand them if they choose).

4. **OBE's Four Operational Principles** maximize the Conditions of Success when educators integrate them with these other three Pillars and apply them consistently, systematically, creatively, and simultaneously in how and when they teach, assess, and credential students. These four essential operating Principles are:
   - **Clarity of Focus on Outcomes of Significance** (before, during, and after instruction);
   - **Expanded Opportunity** for All to Succeed (through diagnostic formative assessments, second chances, and initial grading in pencil);
   - **High Expectations** for All to Succeed (by only fostering, accepting and grading high quality work);
   - **Designing** (their curriculum) **Down** (from where they want their students to ultimately end up – with the abilities and attributes of successful 'Total Professionals').

Later in this chapter I will explain what each Principle is in more detail, how it works, and the role it plays in bringing 'real' OBE into form.

Condition 3: OBE's Foundation of Criterion-Defined Standards

In order for this third essential Condition to make sense, you may have to let go of everything you understand about education's conventional selection-oriented, numbers-driven system of assessment, grading, and awarding credit.

OBE's approach is NOT about numbers, scores, points, percents, grades averaging and ranks!!

All of those things are merely **symbols** educators use to label learning demonstrations, but they tell us nothing about the SUBSTANCE of the demonstration itself. That requires accurately stated words, and that is what Outcomes are: **substance-based**, **criterion-defined Statements of performance learning.**

If this doesn't immediately register for you, think about Merit Badges in the Scouts or 'Belts' in Martial Arts and note: **They don't give B- Merit Badges or C+ Belts!** Those performance credentials are defined by specified sets of things you must do **accurately**, **reliably**, **fully**, and with **quality** in order to attain that level of designated accomplishment. If all its defining criteria are not met initially, you simply don't get the award, YET. But notice: You can always come back and try again, just like in OBE. So, the larger point here is that:

> "Performance standards in OBE are set around carefully defined and described **criteria** that are made known to students at the beginning of an instructional experience and are repeated and reinforced as they progress toward a culminating demonstration of all of those criteria."

If we were to imbed both the substance and spirit of OBE's **Clarity of Focus** Principle in the middle of this quote, we would find them to align beautifully. Although all four Principles are essential to any authentic implementation of OBE, there is none more critical or powerful than the one we call **"Principle 1."**

For it and all of the other Principles to be true Pillars of OBE's power, they have to be supported by a solid foundation of criterion defined standards – standards that clearly state what learning success means, from which you can **Design Down**, for which you can have **High Expectations**, and for which **Expanded Opportunities** are provided, if required. Therefore, Criterion-Defined Substantive Standards constitute the Condition of Success that actually defines

what successful learning means. These Substantive Standards are so essential that, without them, OBE will be more aspiration rather than operational reality.

In touching on these issues here, I fully realize how complex and controversial anything, and everything related to performance standards and assessments are. I have addressed the issue head-on in my 2018 book ***Beyond Outcomes Accreditation***, but even that is not enough. Consequently, I have created an entire program explaining them that is described in the Epilogue. Please check it out because these issues are both the **substantive and emotional heart and soul** of any 'modern' educational model.

Condition 4: OBE's Paradigm Shift from Time-Based Education

The same is true for this fourth Condition of Success. From 1980 onward, OBE implementers have consistently understood and endorsed the word **'Based'** to mean that:

> "Organizational functions are **Defined** by, **Focused** on, **Designed** around, and **Organized** around something."

In 'educentric' education, people claim that that 'something' is the curriculum, but the combination of **clock**, **schedule**, and **calendar** overrides it. Education **Bases** its operations on **time blocks** of various lengths, and everything else marches to that drummer.

Although it may be difficult to comprehend at first, becoming ***Outcome*** **Based** is a stunning shift to a new ZERO in which your institution's programs are Defined by, Focused on, Designed around, and Organized around how well students are learning and ultimately demonstrating what you've defined as your instructional mission – your Outcomes. When that happens, time becomes the Alterable

Variable that Benjamin Bloom described in 1968, and you will offer students a **flexible, learner-responsive** schedule of Expanded Opportunities to demonstrate their learning. It may sound harsh, but you can't be both **Time**-Based and **Outcome**-Based. You have to choose.

Maximizing the 'Conditions of Success'

Translating OBE's 'Success for All Learners' philosophy into Success for All Learners 'reality' happens through the **consistent, systematic, creative**, and **simultaneous** application of the four key Principles noted above. Those Principles were derived by OBE's early leaders directly from Carroll's and Bloom's work. From one perspective, the Principles are elements of OBE's Philosophy; but from another they provide educators with more precise guidance for maximizing the power and benefits of the conditions that directly impact learning success. In fact, it's fair to say that:

> **You're not doing 'real' OBE if you're not consistently, systematically, creatively, and simultaneously applying the four Principles to everything that affects student learning and success** -- your curriculum, instruction, assessment, performance standards, record-keeping, opportunity, credentialing and advancement.

In other words: ***Without the four Principles, it isn't OBE!***

Each Principle is essential because each plays a critical role in creating the chemistry that maximizes students' opportunities to fully prepare themselves for what lies ahead, both in education and in life. Here's the deeper meaning of each Principle and how it shapes OBE implementation.

Clarity of Focus on Outcomes of Significance

Although implementing all four Principles is essential, none is more important than this first one. It's commonly called **Principle 1** because **Clarity of Focus** gets you into the Outcome-Based 'game' in the first place and shapes how the game is played. (Note: if you don't have Outcomes, this Principle is moot and weakens the impact of the other three.)

After a decade of working with this Principle, many practitioners thought it should be renamed the **Focus on Outcomes** Principle because that is what it accomplishes. My view is that it does both. This Principle gives faculty instructional focus so they can, in turn, offer **clearer guidance, orientation and understanding** about the learning experiences to their students. Here's how it guides instructors:

- Be clear on Day 1 in defining and describing your **ultimate** intended student learning result.
- Make that clear by **modeling** and **explaining** that ultimate Outcome to them on Day 1.
- Each day be clear about what your **primary** steppingstone objective is for them and explain how it leads and relates to your **ultimate** Outcome.
- Make that clear by modeling and explaining each stepping-stone result before you start.
- Explain that their success on attaining that **ultimate** learning result (Outcome) is also your success; hence, everything will be aligned so there will be no tricks and surprises in how you teach or test.

Our most-used slogans when working with the "Clarity of Focus on Outcomes" Principle are:

CLEAR PICTURE and NO SURPRISES!!

Why? Because the Purpose of good instruction according to Bloom is to help students learn successfully what both they and the instructor deem relevant and important. Applying this Principle models and makes clear what the intended learning result of the instruction is, and it puts that new learning into a clear context that has 'big picture' meaning.

When this Principle is used regularly and well, students rarely ask, "Why are we learning this?" and "Do we have to remember this for the test?" (Hello students, if it's a 'real' Outcome, your learning demonstration probably won't be a paper-pencil 'test' anyway. And if it's an Outcome of Significance, it surely won't be.) That's coming up in Chapters 6 and 8.

Expanded Opportunity for All to Succeed

Expanded Opportunity (EO) is central to Bloom's Mastery Learning model. On its face, Expanded Opportunity sounds both noble and rather easy to implement, but that isn't true. For those adhering to ***educentrism's*** limited-opportunity practices, it's OBE's most problematic and controversial Principle. Here are antidotes to those obstacles.

First, ML stipulated that Learning Time should not be limited to the first-time students encounter new material and receive some kind of assessment. ***Formative assessment***s of whatever kind (not necessarily a test) should be diagnostic and followed by some reasonable amount of targeted corrective instruction before a ***summative*** assessment is administered. According to Bloom, no permanent grading should be done until that ***additional learning support is given*** and at least a second assessment is administered.

Second, this Principle opens the gateway to countless practical and creative ways to provide struggling students with **EOs** and more assistance during the 'course of the course'. Since '**opportunity ends when you get graded in ink',** even grading can be deferred until after the typical school year ends, as some examples below suggest. Eliminating education's Time-Based determinism doesn't mean that institutions must throw away the clock, schedule, calendar, or grade book. Instead it means being more open and flexible to innovative ways of using time and providing additional learning support to those students who need it.

Third, **EO** is problematic primarily because of Education's deeply entrenched, uniform, assembly-line instructional pacing and its **'Sorting and Selecting'** mission. It's also controversial because of the entrenched, highly judgmental, orthodox cultural mindset that equates **mistakes** with **'FAILURE'** – in attention, diligence, motivation, mental capacity, or all of the above. Moreover, this mindset seems to assume that the goal of any endeavor is **perfection**, and that perfection is the 'natural' result of one's attention, diligence, motivation, mental capacity, or all of the above. Traditional education's grading and record keeping systems treat mistakes as **permanent 'faults'** that get averaged into the things you eventually and ultimately learn to do WELL.

EO also runs against the grain of conventional time-based grading practices in which grades are treated as **permanent** and **unchangeable** on the fixed dates they are given. This is further cemented in place by conventional testing practices in which students are given **one and only one chance to take the test, with all grades being FINAL –** the point made earlier. By contrast, OBE treats mistakes as **necessary stepping-stones to expanding one's abilities** in whatever endeavor they're pursuing. (Similar to learning to play an instrument.)

Back in the day Bloom assumed that **EO** was under the teacher's control and that it applied to small units of work that even the

slowest learners could master in a couple of weeks. Soon, however, its deeper meaning and implications hit home, and everyone wanted to know: **When should opportunity end?** Each Friday? At the end of the grading period? At the end of the term? Or the semester? Or the academic year? Or at graduation? No one knew back then, **and that continues today**. Why? Because **EO** is a **moral decision** tied to your values and your paradigm of what learning, Outcomes, and opportunity mean.

OBE's Non-educentric Responses

Here are some things to ponder about Expanded Opportunity in response to educentrism's criticisms:

> Opportunity ends when a student's grades turn into INK.
>
> Opportunity still exists as long as grades are in 'pencil' and can be changed.
>
> Conventional Education: It's immoral and illegal to change a student's grade!
>
> OBE: It's immoral and illegal NOT to change a student's grade if their performance on that learning Outcome has improved and can be documented.
>
> OBE: A student's GPA is the average of all the mistakes they have ever made.
>
> OBE: Students, never make mistakes because they will always be held against you.
>
> OBE: God forgives; GPA's don't.
>
> OBE high school principal: "All grades in my school will be in pencil until graduation night, because, until then, no student is going to be given the message that's 'it's too late to improve their learning' on something we have taught them and get credit for it. So, with us opportunity ends graduation night."

> OBE: Courses aren't bodies of knowledge, they're pre-scheduled nine-month events. Bodies of knowledge change and expand all the time, but the length of courses never changes. Somewhere in that dynamic the knowledge is getting compromised to the calendar.
>
> OBE: There are about 1,000 instructional hours in a typical school year, multiplied by the number of instructors. How can schools use that time smarter and better?
>
> OBE: It all comes down to CREDIT. As long as it's defined and meted out in Semester-Hours, schools and universities will never become Outcome-Based.

OBE has a hundred ways to help education become less TIME-BASED in how it treats learning performance. It's 'time' to let go of 19th Century assumptions, practices and paradigms.

High Expectations for All to Succeed

As with Expanded Opportunity, the **High Expectations** Principle emanated from Bloom's ML work when he raised the bar regarding 'acceptable' learner performance from 70 to 80 percent. That high expectations/high performance standard of 80 remained that way for eighteen years in the U.S. until the whole notion of points and scores was finally challenged and replaced with 'real' Outcomes (see Chapters 4 and 6). Until then, ML/OBE yielded evidence of impressive numeric gains in all kinds of learning areas. Whether the 80 percent standard was used or not, by the late 1980s **High Expectations** had gone from being a guiding Principle of OBE to being a proven reality.

A key to these gains was the 'wisdom' gained by some OBE practitioners regarding grading. After some years, they changed both their understanding and strategy of how to work creatively with this 'dreaded' topic. The bottom lines of their insights and the

lessons they learned are reflected in these widely shared 'words of wisdom':

> Any grade you give is potentially a reward to those who only want to 'be done'.
>
> What you accept is what you expect.
>
> Any work you accept and grade means that you don't expect anything better from the student, so only accept good work.
>
> Anything less than 'good' is not acceptable, so don't validate it with a grade.
>
> Only give good grades for good work. Anything less is 'Incomplete' and should earn no credit.

And their bottom-line message to students:

> **If it isn't good, it isn't done . . . yet!**

Yes, some schools only gave high grades, which disturbed some traditionalists, but students had to **earn those high grades by doing quality work**, and that made the difference – especially when 'Incomplete' meant **'No credit yet'**, and 'No credit yet' meant 'No graduation diploma unless things change'.

Design (Your Curriculum) **Down** from Where You Want Your Students to End Up

OBE's **Design Down** Principle emerged from Bloom's realization that much learning 'failure' was the result of students not having had, or developed, the necessary prerequisites for the work being required, rather than for poor teaching or for lack of student ability. Consequently, a key element in the ML process was for teachers to give students a short, simple pre-test on those 'cognitive prerequisites'

before beginning any lesson or unit. These short pre-tests often revealed things students didn't know or couldn't do that were essential to their success, so teachers had to adjust their instructional plans accordingly.

As time when on, this emphasis on specifying and testing prerequisites led to various approaches to a 'backward mapping' curriculum design process. This exacting process began with instructors having to identify and define their **ultimate** Outcome(s) **(Clarity of Focus on Outcomes)** for their course, learning module, or unit of instruction. From that starting point they would then repeatedly ask . . .

"What do the students need to know and be able to do in order to do this?"

. . . over and over and over until they reached a point in their 'design map' where they were confident that all their students could begin and from which they could successfully proceed.

The good news is that skill-oriented courses such as mathematics lent themselves well to this process and yielded some remarkable results. The bad news is that it's not an easy process, so instructors often avoid it and rely on textbooks and syllabi that are not designed this carefully. But when **Design Down** is done well, the learning results for students can be astonishingly good, especially when integrated with the other three OBE Principles and applied ***consistently, systematically, creatively,*** and ***simultaneously***.

CHAPTER 4

Defining Outcomes and Igniting a Revolution

As strange as it may sound, Outcome-Based Education grew into a full-blown reform movement in the U.S. between 1968 and 1986 without anyone in the movement knowing what an Outcome was. Both the name OBE and the momentum around it were carried forward because any and every kind of learning 'measure' was considered to be an Outcome.

Since those would-be numerical measures showed decidedly positive improvements in student learning, graduation rates, and college attendance rates, they alone attracted great attention. Conventional points, scores, percentages, and averages of all kinds about student learning were going up and up because of Mastery Learning and what was also being called OBE after 1980. With all of this success at hand, no one seemed to be concerned that any and all of these non-equivalent numerical indicators of learning were called 'Outcomes'.

A Culminating Demonstration of Learning

This bubble of euphoria suddenly burst in 1986 immediately following a national OBE conference, and the shockwaves changed everything that OBE would eventually advocate and embody. The details that led to this eruption are far less important that the major conclusions that were drawn from it. A brilliant team of high school teachers – Christi Davis, Doug Deever, and Spence Rogers – and I came up with a definition of an 'Outcome' that has endured for over three decades. It said:

An Outcome is a **"Culminating Demonstration of Learning!"**

We further explained that:

1. This definition means that **Outcomes** are concrete, tangible demonstrations of learning that are defined by words, not numbers. This definition serves and strengthens OBE's primary purpose and focus – improving student learning that really matters in the long run. That improvement depends on having clear **substantive criteria** for what long-lasting learning means.
2. By contrast, **numbers** do NOT convey substance and are not the learning or its demonstration. Moreover, they allow for easy and questionable distortions and comparisons that directly and readily serve education's traditional ***Sorting and Selecting*** functions – functions that OBE ardently strives to MINIMIZE.

Hooray!! The OBE movement finally had a definition on which it could meticulously build and could at least slow the avid pursuit of points, percents, and averages. The path ahead would be challenging, but after eighteen years, OBE's leaders in North America had finally figured out what an Outcome was! Alarm bells rang, of course, and cries of outrage and despair were heard in some quarters because, with this definition, OBE itself had just undergone a profound paradigm shift. That shift is encapsulated in this 'revolutionary' statement:

> Numbers and scores ***about anything*** are being replaced by carefully chosen words about ***everything*** that really matters for students in the long run.

However, our paradigm-shifting definition sent shockwaves through the OBE community, and eventually it split into two groups:

1. The **Quantitative** Mastery Learning group that continued implementing key things in the ML model, especially Bloom's 'high expectations' standard of **80 points**; and
2. Those who went on to shift the greater **Qualitative** paradigm of OBE several more times as they probed ever-deeper into what the words **'culminating demonstration of learning'** meant and implied.

As a leader and supporter of the latter group, I'll describe here how our understandings of both Outcomes and OBE have evolved over the past three decades and what they have come to mean for educators on five continents as a result.

Demonstrations Are Tangible and Observable Actions

First, the insightful teachers in our leadership group quickly noted that a **Demonstration** isn't a score, or a percent, or points, or even just mental activity. It's a **'performance'** – a **tangible action** – shaped directly and explicitly by the **words** used to define the action. Therefore, they reasoned, teaching and learning had to focus on the fulfillment of the words used in any given Outcomes statement. This meant that:

- Students would have to **DO all of the words** that defined the Outcome;
- Teachers would have to **TEACH them how to do all of those words**;
- Assessments had to **directly and precisely EMBODY all of those words**.

THIS WAS MONUMENTAL. With the stroke of a conceptual and literal pen, points and scores were being replaced by **substance**, and **every word** of the substance mattered! Since we were largely

unfamiliar with how to carefully define substance, rather than simply assigning points and scores to student learning, this posed a huge challenge for everyone! To help them along and keep them focused on the new challenge, we created a number of slogans that were eventually called *'Spadyisms'* as reminders of how to approach, design, and implement what this new design task and opportunity represented. Four frequently used *Spadyisms* were:

OUTCOMES HAPPEN!

WHAT YOU SEE IS WHAT YOU GET

80 OF WHAT?

YOU CAN AVERAGE SCORES, BUT YOU CAN'T AVERAGE OUTCOMES

Demonstrations Require Action Verbs

This new definition also directly implied that Outcome statements should start with what we called **'demonstration verbs'** (otherwise known as **action verbs**)**,** not mental processing verbs. At that time, it seemed that virtually **all** of the things educators called Outcomes, objectives, or learning goals started with just two verbs, either ***know*** or ***understand***. Teachers felt justified in using them because they were using Bloom's "Taxonomy of Cognitive Objectives" to guide their instruction.

Since it was obvious that *know* and *understand* weren't **'demonstration verbs'**, we argued that learners would need to DO something that is **visible** or **observable** for there to be an authentic demonstration. In effect, they'd have to ***apply*** what they know or understand in some visible way, not simply **remember** things for paper-pencil **tests**. This logical implication led, in turn, to what came to be called OBE's

'Law of Alignment', which meant that 'everything' had to **perfectly match** both the **verb** and all the other words in the Outcome statement.

To make it simple to understand and repeat, OBE teachers would remind each other to follow ***The Law of Alignment***, meaning that:

- The curriculum had to EMBODY ***the verb***
- Students had to DO ***the verb***
- Teachers had to TEACH ***the verb***, (i.e., teach the skills required to execute the verb)
- The assessment also had to DIRECTLY EMBODY ***the verb***
- The record-keeping system had to RECORD ***the verb***.

Not only that, teachers also had to draw a sharp distinction between very simple **'wimpy'** verbs, demonstration processes (such as *name*, *list*, and *underline*), and more complex and **powerful** ones (like *explain*, *design*, and *produce*). Here too we used three particular *Spadyisms* to reinforce these insights, namely:

NOT ALL VERBS ARE CREATED EQUAL

AVOID WIMPY VERBS

BY THEIR VERBS YE SHALL KNOW THEM

Demonstrations Require Competence

Then we discovered another deeper truth about 'demonstrations of learning': Proper action and application require **tangible skill** and **applied competence**, not just mental processing and having a good memory. Eventually this insight got translated into this piece of guidance:

> **Quality learning** involves both **Content** and **Competence**, which elevates it from being **one-dimensional** mental processing of content to being a **two-dimensional** application of that content.

This realization, in turn, represented yet another huge challenge for teachers and curriculum developers because they recognized that it was one thing to **'teach' content**, and quite another to **'develop' competence**. Not only that, student learning now went far beyond assimilating and retaining small segments of content, which usually didn't take much time. So now Outcomes involved competence building that could take months and years to mature, especially if it involved a complex ability.

The challenge for teachers became how to manage competence building in a small 'unit' of instruction that was only supposed to 'take' one or two weeks to 'teach.' They soon discovered that **you couldn't design, teach and learn a true Competence-Based curriculum the way you could design, teach and learn a purely Content-Based one**. It might take months and even years to develop a complex competence, not just days and weeks. And if all of this wasn't challenge enough to conventional instructional thinking, our four-word definition also included the word '**Culminating**.'

Outcomes Happen 'At or After The End'

Not only do Outcomes 'happen', we realized that they happen '**at or after The End.**' That's what **'Culminating'** means, but in 1986 no one knew which End it implied, including us. Teachers were accustomed to planning and implementing their instruction a week (i.e., an instructional 'unit') at a time, which meant that Friday was their customary 'End' – unless it was 'grading time' when 'culminating' presumably meant the end of a grading period, semester, or school year. Since teachers were accustomed to averaging everything the

students did **before** these notable End dates arrived, the word 'culminating' was even more challenging to all of us than the word 'demonstration' had been. Why?

The word 'culminating' brought OBE's **Expanded Opportunity** Principle directly into play because Outcomes are what happen at or after the End and because Expanded Opportunities were understood to be appropriate after students had been given at least one initial opportunity to demonstrate the Outcome. Consequently, teachers had to figure out on which of several potential Ends that culminating demonstration and those Expanded Opportunities were to occur.

Not only that, they were being reminded that everything that happened **before** the End, **wasn't** really the Outcome and **shouldn't** be averaged in with the assessment of the Outcome. The Outcome was the Outcome – it was what the students could **ultimately** do **after** all the trial and error learning and Expanded Opportunities had taken place.

Eventually, then, my three OBE teacher leaders got their colleagues to agree that:

1. 'The End' wasn't what happened ***during*** a given week or time block**;**
2. 'The End' wasn't every Friday – which thereby eliminated the legitimacy of averaging lots of micro things along the way; and
3. The larger the period of time an 'End' subsumed, the more macro, complex, and significant the relevant Outcome needed to be to match it.

These three agreements were reinforced by frequently announcing these often-repeated *Spadyisms*:

OUTCOMES HAPPEN AFTER 'DURING' IS OVER

THE BIGGER THE OUTCOME, THE MORE TIME THEY'LL NEED

WHEN YOU RUN OUT OF TIME, THEY RUN OUT OF OPPORTUNITY

OPPORTUNITY ENDS WHEN YOU GET GRADED IN INK

WHEN IN DOUBT, GRADE IN PENCIL

Little did my colleagues and I realize in 1986 how deep and immense the implications of our four-word definition of an Outcome were. Thankfully we **stayed open** to where these implications might lead us, and by doing so there seemed to be no end to the revelations and expansion that unfolded. One person who did was Jim Gilson, the Principal of a small school for English-speaking students just outside Sanaa, Yemen. He was so struck with OBE's power and potential in 1986 that he eventually founded 37 schools on it in 31 countries, all based on what you've read about OBE so far in these chapters.

Quality Schools International in 31 Countries

I first met Jim at the 1986 National OBE Conference in Phoenix, AZ where I realized that we didn't know what an Outcome was. Several months later I was introducing Jim's faculty to what's in Chapters 2 and 3. Jim eventually established Quality Schools International (QSI) in 1991 with two schools: in Aden and in Albania. QSI's 37 schools now enroll about 7,500 students, plus their virtual school with another 200. Eight QSI schools are in China and East Asia,

nine in Central Asia and the Caucuses, fourteen in Europe, and six in Africa and the Americas. (The Sanaa school no longer exists; having mistakenly been bombed by the Saudis years ago.)

All QSI schools are **'based'** on what Jim learned about OBE in '86 and on subsequent trips to OBE workshops the U.S. As he described it:

> Our schools follow a logical model of education that measures success by the accomplishments and attitudes of our students. We believe that all of our students can succeed, that their successes encourage them to continue in a pattern of success, and that it is the schools' responsibility to provide these conditions for students. These conditions include:
>
> 1. Developing clear statements in measurable terms of what the student will do to demonstrate mastery of learning;
> 2. Providing the time and resources needed for each student to attain mastery;
> 3. Ensuring that students engage in learning at a level which is challenging yet a level for which each student has the prerequisite skills necessary for success.
>
> When students leave QSI, it is purposed that each demonstrate success in specified general outcomes or behaviors. When a student graduates, these outcomes are built into the graduation requirements and are reflected on both the graduation diploma and the student transcript. These outcomes are also reflected on a continual basis in the student evaluation reports at all age levels and fall into three broad categories:

I. SUCCESS ORIENTATIONS – Defined by 'to be' verbs

A. Trustworthiness
B. Responsibility
C. Concern for Others
D. Kindness/Politeness
E. Group Interaction
F. Aesthetic Appreciation
G. Independent Endeavor

II. COMPETENCIES – Defined by 'to do' verbs

A. Verbal and Written Communications Skills
B. Numeracy and Mathematical Skills
C. Psychomotor Skills
D. Commercial Skills
E. Artistic and Musical Skills
F. Thinking and Problem-Solving Skills
G. Decision Making and Judgment Skills

III. KNOWLEDGE – Defined by 'to know' verbs

A. English/Literature
B. Mathematics
C. Cultural Studies
D. Science
E. Languages other than English
F. Creative and Applied Arts
G. Personal Health & World Environmental Issues

In summation, Jim explained that there are related and overlapping issues and interdependencies among these three QSI Outcome

categories, and the 'demonstration' verbs used help identify which is which. But regardless of the Outcome, the staff focuses unerringly on creating and expanding conditions of success for every student.

I fervently wish that all students everywhere could be learning under similar 'success for all' conditions.

CHAPTER 5

Stop Calling It OBE, Unless It Is

It's hard being famous. You attract a lot of attention wherever you go. Fan clubs spring up everywhere, and people put you on a pedestal. Once you're up there, you're either admired and adored, or criticized and condemned. Worse yet, you're a target . . . for every 'good' and 'bad' thing that comes along. There seems to be no escape. Fame is clearly a two-edged sword.

Well, friends, that's not about me. It's about OBE. Like it or not, it appears that people across the world have put their version of it up there and then asked me to either offer or accept praise for what's there. That's the hard part because social conventions dictate that we're always supposed to say something nice about what, in good faith, people have accomplished.

False Claims

That's what's expected of me because everywhere I've gone recently I'm called, 'The FATHER Of OBE'. No I'm not! I'm just the father of Vanessa Spady. Somebody made that up, and it has 'stuck'. To qualify for that title, I'd have to be thousands of years old – before humans had school systems, universities, national assessment systems, international accreditation bodies, and host of other things that are claiming to be Outcome-Based.

I am a believer in AUTHENTICITY, and that's what most things claiming to be OBE lack. Alas, I'm unable to pretend otherwise.

As I hear people tell me that 'OBE is everywhere' and this or that country/university/school system/school is **'really doing it,'** my usual response has been:

> **"No they're not! They're just claiming that it's OBE, but it's really _____."**

You get to fill in the blank, but I'll provide you with a few hints:

- CBO, not OBE
- Outcomes Accreditation
- A national or state testing program
- A mandated accountability policy
- A conventional ***educentric*** 'reform' model
- All of the above.

How can I be so undiplomatic? Well, I could quote my now deceased colleague Dr. John Champlin and say, "I didn't go to charm school." Or I could ask, "Do they know what an Outcome is, and what Based means?" Or say, "I see no evidence of OBE's four operating Principles in what they're doing;" or even, "They clearly haven't read the first six chapters of this book yet." But you have, and I'd like you to move forward with an Authentic message and understanding of what the essence of OBE is and the breakthroughs it represents.

Saying Goodbye to the CBO Syndrome

Unfortunately, most schools, universities, national systems of education, and international accreditation bodies have **not** made the necessary conceptual paradigm shift around the concept of **'Based'**. Consequently, what they say and do in the name of 'OBE' is way off the mark. When you examine their misunderstandings closely, they

fall into very consistent patterns that begin with the letters, C, B, and O – not O, B, and E. I call it the **'CBO Syndrome.'**

The key to saying "Goodbye" to the CBO Syndrome is taking the words "Outcome-Based Education" literally. Given what we've learned about the word 'Based', those three words mean:

Basing Education on Outcomes.

They do NOT mean what I see most often: Writing Outcomes for, or about, the Education/curriculum you already have, or Limiting Opportunities for students to demonstrate their learning to fixed, predetermined Calendar dates. These distinctions are profound and explain the massive amounts of IMITATION OBE that I see all over the world – things that start with the letters C, B, and O, and ***fundamentally misrepresent*** what OBE is and how it continues to evolve.

Here are ten of the Syndrome's most prominent **non-OBE** elements:

Curriculum **B**ased **O**utcomes
Content **B**ound **O**bjectives
Calendar **B**ased **O**pportunities
Cellular **B**ased **O**rganization
Convenience **B**ased **O**perations
Credit **B**ased **O**bsession
Convention **B**ound **O**bsolescence
Culture **B**ound **O**rthodoxies
Compliance **B**ased **O**rientations
Control **B**ased **O**bedience

Please take the time to compare these prevalent CBOs with what you now know about OBE, keeping in mind the constraining grip that ***educentrism*** exerts over the entire educational process.

So as you reflect on how your school or university actually operates right now, please be willing to address the following questions as candidly as you can and discuss them with your colleagues, asking whether you now are doing CBO, or implementing authentic OBE.

> Are you addressing and promoting Curriculum Content Outcomes and Objectives, or ones that reflect authentic performance abilities? (To be described and explained in Chapters 6 and 7.)
>
> Are Opportunities for improving student learning and getting credit for it provided beyond fixed testing and reporting Calendar dates?
>
> Are all student learning Opportunities determined by the clock, schedule, and calendar and limited to conventional self-contained classrooms or lecture halls?
>
> Is this just a mandated, accountability-oriented testing program?
>
> Given the structure and substance of the curriculum, is movement toward Life-Performance Exit Outcomes even possible?

Keep asking tough questions about each of these CBO's. What you'll begin to see about the entrenched nature of ***educentrism*** is shocking. And while some of these CBO's may not seem immediately relevant, they will when you engage with the ideas about OBE's empowering, evolutionary character in the latter chapters. Should you have

doubts about where your own institution stands regarding any of these CBO's, start by focusing on the top six. They really embody and foster ***educentric*** practice.

Counterfeit OBE's International Fame

Sometime early in 2014 I received a call out of the blue from Dr. Francis Uy, the Dean of Engineering at one of the Philippines' leading technical universities. He was pleading with me to come to their country because all of their major universities were being required to get 'international OBE accreditation' by their national Commission on Higher Education. "Everyone in the country is talking about OBE," he said, "and we have to have the legitimacy that international accreditation brings."

Guess what I said back? "No, they're not doing OBE! They're just claiming that it's OBE, but it's really just Outcomes Accreditation using the OBE label." Then to change the script a bit, I said:

> "The international OA people rely on test scores, points, and averages and clearly don't know what an Outcome is, or what Based means. Nor do I see evidence of OBE's four operating Principles in what they're doing. And besides, they clearly haven't read the first five chapters of my original 1994 OBE book yet. So, thank you for contacting me, Dr. Uy, but I'm not coming."

That was the first of several increasingly desperate calls from him over the next eight months, and my response was about the same. Outcomes Accreditation (OA) was simply compelling them to be even more ***educentric*** than they already were and turning that battleship around was going to require more time, patience, and support than I was willing to muster.

Guess what (again)? Thanks to his efforts, in April, 2015 I found myself addressing about 300 higher educators at a national conference near Manila, and from then on I undertook regular, lengthy trips to the Philippines that continued though 2018. On those trips I spoke to untold thousands of higher and basic educators during that period about Authentic OBE, reinforcing the above script again and again.

But by mid-2017 my Filipino colleagues and I became quite disillusioned with the government's intransigence and decided to write a short book about the situation and get it out as soon as possible. Spurred by my colleague Wajid Hussain in Saudi Arabia who was encountering similar challenges there, we wanted to tell the truth about OA and OBE to anyone anywhere who could read or listen. With the support of Rex Bookstores, a leading Filipino publisher, we did. Its title: ***Beyond Outcomes Accreditation: Exploring the Power of 'Real' OBE Practices.*** It was printed and released early in 2018.

The Good News and Bad News

The silver lining in this story is that the leading university accreditation bodies in the U.S. are carrying the OBE label all over the world to foreign universities eager to get the stamp of legitimacy that accreditation provides. 'We've met the same standards that American universities have met, therefore you should hire our students, etc., etc.' Through this worldwide 'free advertising' campaign for OBE, perhaps there will be academics or government agencies willing to learn about 'Real OBE Practices'. Although countless Filipino higher educators have now been exposed to those 'real' practices through my many presentations and offers of support, the directives of their national government remain highly divergent from what you've learned so far in this book.

The Filipinos' dilemma is echoed all over Asia and the Middle East: Should we **comply** with OA's requirements and directives**,** or should we **change and implement** 'real' OBE?

And Speaking of Directives…

Basic educators across the world – and especially in the U.S. – are operating under mandates that we could call either **Assessment Based Accountability** or **Accountability Based Assessment**. They're pretty much the same thing, and they **entrench** ALL TEN CBOs noted above, especially the ones called **C**ulture **B**ound **O**rthodoxies, **C**ompliance **B**ased **O**rientations, and **C**ontrol **B**ased **O**bedience. These ABA's have been around for at least twenty-five years, and no cohort of younger parents has managed to escape them on the education they received, either as students themselves or in dealing with their stressed-out younger children who face them now.

Societies and their policy makers have ignored the appeals of testing experts who demonstrate fervently that these very limited measures should NOT be used in the 'high stakes' ways they are. Nonetheless, decision makers have been persuaded by someone/somewhere/at some time that the results of these mandatory standardized, paper-pencil tests, administered in the name of 'Educational Reform', are the qualities, knowledge, and capacities required for fruitful living in the 21st Century. They are NOT.

I suggest that these accountability advocates get a hold of this book, read Chapters 4 and 6 for starters, and sleep at night with a copy of the Life-Performance Wheel under their pillows. Or alternatively, they could read my 2000 book ***Beyond Counterfeit Reforms*** in which I spell out 25 kinds of 'intelligence' that very successful people I know clearly manifest in their lives. Yes, 25 different intelligences

that really pay off in life, and only a few of them can validly be 'measured' by the narrowly focused tests now driving our schools.

Worse yet, both the tests and the accountability paradigm underlying them ignore, deny, or suppress almost everything we now know about brain-based learning, quality of instruction, multiple intelligences, human potentials, and all of the other human qualities and capacities you see elaborated in this book. These alleged 'reforms' also exemplify everything presented in Chapter 1 about our factory-model of education, ***educentrism,*** and the Industrial Age culture that endorsed and produced them. And to top it off, many of these counterfeit reforms are both **'dumbing down'** the curriculum and education that children now receive, and **driving** creative, engaging teachers **out** of the system.

Oh, and did I mention that many of these counterfeit reforms are being imposed under the banner 'Outcome-Based?'

A Sad Realization

The rather 'pessimistic' content of this chapter reflects the obstacles to any kind of OBE that its serious advocates have faced, some for decades. The countless colleagues who participated with me in this journey did their best to bring OBE's authentic power and promise to the world of **public education** because we wanted the great masses of children who attend those schools to thrive as learners. Our mission and camaraderie were exhilarating, but our impact did not last. Public education was an institution too entrenched in social custom and regulation to change, except in individual cases, and only for as long as strong decisive leadership carried the day. Once the committed leaders stepped away, educentric institutional inertia took over, and things went back to 'normal'.

That's why this chapter weighs heavily on me. All of these amazing people met lots of resistance and obstacles to their best efforts – some from individuals, much from 'business as usual', and lots from governmental agencies of various kinds that seemed impervious to the benefits that OBE would bring to children, educators, and the long-term welfare of the society. It hurt to remember those difficult days as I wrote this, and it hurts even more to bring three stories of great OBE successes to light in this book because there are no mainstream public schools among them. Two of them are **private** schools (in Chapters 4 and 7), and the third is an **alternative** high school (Chapter 10).

All three schools represent models shaped by people with uncommon vision who've had the freedom to embrace the possibilities being offered, the willingness to do the hard thinking and change work, and to persist. These leaders – Jim Gilson, Sister Felicitas Bernardo, and Trace Pickering – have seen major changes materialize from their efforts, know that some variation of Transformational OBE works, and continue to share its optimistic message with those open to learn. To them I offer my profoundest thanks!

PART 2

OBE's Transformational Paradigm Shifts

CHAPTER 6

The Future Changed Everything . . . Again and Again

Determining what Outcomes were, and when they were to be demonstrated, proved to be one of the very greatest challenges OBE implementers would face. Well, until in 1987 when we realized that Outcomes *Really* Matter to students in The FUTURE. Amazingly, our next paradigm-shifting breakthrough occurred just a year later when **the entire OBE movement became 'Future-Focused' . . . almost overnight.**

Everything we'd been thinking and doing had to change once again because that revelation swept us back to a new ZERO. Once there, we realized that we had been developing Outcomes for the curriculum that already existed, rather than developing Outcomes for the FUTURE the students would be facing and then **Basing** curriculum on those Outcomes. And boy did those two Paradigms prove to be different!!

While becoming future-focused may seem obvious and routine to us today, please remember that the 1980's was a decade of enormous awakening regarding technological, organizational, and social change. The futurists were shouting that what lay ahead was going to be nothing like the steadily evolving past that we knew and they were right.

The Catalyst: A Newspaper Article

There may never have been something called **Transformational OBE** had it not been for a newspaper article in the *San Francisco*

Chronicle in the spring of 1987. That article shifted my paradigm of education more than anything I can recall. It described about a follow-up study involving the valedictorians of America's top 300 universities. Although they were clearly the best of the elite students in the country, they were doing poorly in 'life after university'. Many were unemployed, and large numbers were struggling. The essence of the story was that their education, no matter how successful, had not prepared them for life in our increasingly complex, changing world. I was stunned.

Preparation for the Future?

Here we were, OBE's leaders, helping teachers help students become the best students they could be, and it suddenly appeared as if being the very best students possible did **NOT** lead to the bright future that was promised. We OBE advocates had been using entrance to higher education as proof its ultimate effectiveness, but higher education suddenly appeared to be a counterfeit goal. In fact, ALL of education was promising something it could no longer deliver: ***preparation for the future!***

In that moment I realized that mastering education's deeply institutionalized curriculum was no longer ***the*** path to the future since the future we were facing in the 1980's was changing faster than one could document. In short, my colleague Dr. Charles Schwahn and I realized that:

> **Education was great at preparing young people for more education, but it was not equipping them to face a rapidly evolving global future.**

Moreover, no one had a process for basing outcomes on that late-20th Century future. The future was about life, but life wasn't organized around the academic disciplines or school subjects. All the concepts,

constructs, and processes about life lay beyond ***educentrism's*** reach. So, I realized that if we were going to make OBE future-focused and its outcomes relevant to students' lives, we would have to create that pathway from scratch. We did, and that process, called **Strategic Design (SD)**, is described in two books that I co-authored with Dr. Schwahn: ***Total Leaders*** (1998) and ***Total Leaders 2.0*** (2010).

Deriving Life-Performance Exit Outcomes

Although it didn't use traditional education concepts and labels, Strategic Design was surprisingly attractive and compelling to many educational leaders and their communities. In short, the SD process derived life-performance outcomes from this fundamental question:

> **What will students face in the future** (once they've left education)**?**

Chuck and I felt that the answer to that question would establish the ***context*** in which young adults would live and have to find success after finishing their education, and we wanted them to be prepared to thrive in that context. Summarized below are the key questions we asked diverse community groups of citizens, educators and students to address in order to systematically derive a compelling outcomes framework. First:

> What are the major arenas of engagement and experience in which young adults will be functioning once they leave school?

We called these arenas **Spheres of Living**, but they could go by other names as well. Here are two examples of what these Spheres might be. The one on the right is the original one we developed just to stimulate people's thinking. The one on the left emerged from a school district's Strategic Design work – obviously after considerable deliberation.

Spheres Framework 1	Spheres Framework 2
Personal Potential & Wellness	Personal
Learning Challenges & Resources	Learning
Life & Resource Management	Culture
Close & Significant Relationships	Relationships
Group & Community Memberships	Civic
Work & Productive Endeavors	Economic
Physical & Cultural Environment	Global
Purposeful & Fulfilling Pursuits	

Each is a framework that various districts have considered as starting points for their Strategic Design work, but we found that local priorities and orientations led to unique versions that worked for them. The precise number of Spheres identified usually ranged between seven and nine. Once people got to ten, we encouraged them to consolidate if they could.

Second, after communities had identified a set of Spheres, we asked them to assess what the futurists of the day predicted about Future Conditions that lay ahead for young adults and answer this question:

> What significant challenges, problems, and opportunities will young adults be facing in each of your Spheres for which they will have to be equipped in order to thrive?

Once this input was in hand, we turned their attention to **deriving** an **Exit Outcomes** framework for their graduates. The term 'exit' wasn't elegant, but it was straightforward-when students walk out the door for the final time and go into life, the sign above the door says EXIT.

The Biggest of All Paradigm Shifts?

To facilitate this, we introduced them to a sociological concept I called **Life-Performance Roles**. They're constellations of competences a person can carry out successfully across a range of content in a variety of tangible contexts. In deriving these clusters of related life-performance abilities via our third Strategic Design question, we also asked participants to embellish them with qualities that would enhance these roles in fruitful ways, namely:

> Given the Future Conditions young adults will be facing in these particular Spheres of Living, what kinds of **Life-Performance** qualities and abilities will they require in order to thrive in that future?

I spontaneously stumbled onto this remarkable concept while facilitating a strategic planning process early in 1991. As a result, the Colorado school district in question boldly stated that they wanted ALL their students, regardless of any other achievement indicators, academic credentials, personal characteristics, or attributes, to exit their system as:

- Self-directed LEARNERS
- Collaborative WORKERS
- Complex THINKERS
- Community CONTRIBUTORS
- Quality PRODUCERS

Using this first-ever framework later as a prompt proved invaluable because it was simple, easy to understand, instantly compelling, and about **HUMAN BEINGS**, not just skills and abilities. That latter feature was particularly attractive to communities and opened a whole new dimension on the purpose and philosophy of education

for them. They could quickly embrace a new and incredibly inspiring mission for their schools:

> **Empower all their students to BE these kinds of people in everything they learn and do.**

Application Across All Grade Levels

Since life-performance outcomes like these apply to learners of ALL ages and grade levels, they could be addressed and cultivated every day by every student and teacher in the system, K – 12. Only their complexity would vary with student age and maturity. We might have done better calling them **'Universal Outcomes'** rather than Exit Outcomes – or even **'Outcomes for Empowered Citizens'**, but that's the label that worked.

This Life-Performance Role concept has been used extensively across the world in deriving Exit Outcome frameworks, organizational missions, and program priorities for education at all levels. I include many notable examples from Australia, Canada, South Africa, and the U.S. in Chapter 4 of the Spady and Schwahn book ***Learning Communities 2.0*** (2010), and they are currently being used to guide educational thinking and reforms in the Philippines.

Once communities come up with such a framework, however, the SD Process immediately poses a fourth key question for them to answer:

> How would you know one if you saw one?

This brief question is not as cynical as it may sound at first because it brings the issues of ***learning***, ***demonstrating*** and ***assessing*** something to center stage.

Essential Performance Components

That's why, using the five examples above, we placed the word 'who:' after each outcome and had a working group define in **observable statements starting with action verbs** what that kind of person would actually DO to fully embody the construct. For example: **Self-directed LEARNERS, who:** ***Do*** this, ***Do*** that, and ***Do*** other things. It's this set of Do's – which we called ***essential performance components*** – that actually defines what a self-directed learner is and, therefore, makes the outcome 'real' and assessable. Any life-performance Outcome will only be as 'valid', accurate, and empowering as the set of observable Do's that define it – word for word.

Note also that in specifying these essential performance components, we are providing the blueprint for the instruction and assessments that are to come – whether the latter are called formative or not. Since these DO components are what we want learners to be able to execute well, teaching and assessing surely have to match them to be aligned and have legitimacy. This insight, in turn, led us very quickly to SD's fifth and six questions:

> How is this outcome best learned?
>
> How is this outcome best assessed?

As all of this proceeded, we always pointed out that this alignment process also implies accuracy, consistency and fairness – the hallmarks of OBE's Clarity of Focus principle.

The Implications of Strategic Design

When Chuck Schwahn and I had our great awakening about the future in the spring of 1987, OBE became the first organized movement to take educational thinking **far beyond** academic

subjects, course outcomes, and school learning environments. By **'basing'** Outcomes on the future that students faced and would be shaping, we further expanded OBE's already 'radical' definition of Outcomes in three interrelated ways.

1. Performances Happen in Authentic Contexts

First, we recognized that OUTCOMES HAPPEN 'SOME WHERE'– in **social and physical settings, contexts,** and **conditions** that add a **third** critical **dimension** to what a **'Performance'** is and what **'Competence'** requires. These **context conditions** can add great complexity and challenge to Competence that any given Performance requires. Just think about pilots having to land the plane in a windstorm at night on a high-altitude runway, and you'll immediately understand why context is such a vital factor in determining the kind of content and competence you need to accomplish a successful performance.

Therefore, you can't deal realistically with the Content or Competence that a Demonstration requires until you know much more about the physical, cultural and psychological conditions that are likely to affect it. It's the difference between playing harmoniously with an ensemble in a live televised concert with a huge audience and practicing the same music alone at home. In this instance, however, we were suddenly asking educators to take it explicitly into account when defining their Outcomes and reinforcing this new procedure with three additional *Spadyisms*:

> CONTEXT DRIVES COMPETENCE DRIVES CONTENT
>
> PILOTS ARE OUTCOME-BASED AND HAVE TO LAND SAFELY EVERY TIME

LIFE IS LEARNING'S CONTEXT OF SIGNIFICANCE

2. Outcomes of Significance 'Last'

Second, OUTCOMES REALLY MATTER AFTER THEY'RE GONE (out into the Future). This *Spadyism* gave birth to the term '**Outcomes of Significance'**, in which **'Significance'** was interpreted to mean: **What Really Matters in the Long Run**, not just getting grades while taking specific courses in school. Consequently, we regularly emphasized that:

> Outcomes need to 'stick', 'last', and make a beneficial difference in people'slives not just show that they were good students in school.

Adding this new element to what an Outcome implied compelled educators to look much more deeply at the Purpose of their instruction. This, in turn, further extended the focus and relevance of the curriculum, of student learning experiences, and of what was being assessed **far beyond** weekly units of content, chapters in textbooks, and routine Friday tests.

Because OUTCOMES MUST EXPLICITLY RELATE TO WHAT STUDENTS FACE IN THE FUTURE, dealing with those conditions and challenges successfully is **What Really Matters in the Long Run** when students EXIT the system – at **student graduation**.

Therefore, advanced OBE implementers explain that it's at this culminating **exit time** that:

1. A system's **Clarity of Focus** on its 'ultimate' Exit Outcomes should be placed

2. From where its **Design Down** curriculum should emanate
3. On which its **High Expectations** should be based
4. When its responsibility for providing **Expanded Opportunity** ultimately ends

That's also where OBE's Philosophy, Principles, and other Pillars of Power converge in a truly coherent and consistent way.

3. Demonstrations Vary in Scope and Complexity

Third, OUTCOMES TAKE MANY FORMS, and those **Forms** include '**Life Performances'**, the things adults do in their 'real' life roles, not just what students do in classrooms and lecture halls before graduating. As we'll see in the next chapter, these Life Performances gave birth to the name 'Transformational OBE.' Because breakthroughs were happening so rapidly after 1987, we continued to place our primary focus there as the real embodiment of '**Outcomes of Significance**.'

Transcending Bloom's Taxonomy

With all of the insights about Outcomes and their various implications in Chapter 4 and in this chapter, it became clear to OBE's teacher leaders by 1989 that Bloom's original "Taxonomy of Cognitive Objectives" had to be challenged as a template for 'Outcomes of Significance'. For them the Taxonomy almost entirely evoked little more than various kinds of mental processing, rather than complex performances.

So, on their behalf, I undertook a critical analysis of the Taxonomy that started with Bloom's six cognitive processes. They provided what I regarded as the 'IQ/technical' part of a framework that began to take form for me as a rudimentary wheel. Although teachers relied heavily on them, Bloom's cognitive processes didn't represent

the entire picture of what learning is or of the kinds of elements that contribute to successful life performance – the kinds that Daniel Goleman calls **Emotional Intelligence**, or EQ. So, I went to work on EQ demonstrations as well.

The Resulting Life-Performance Wheel

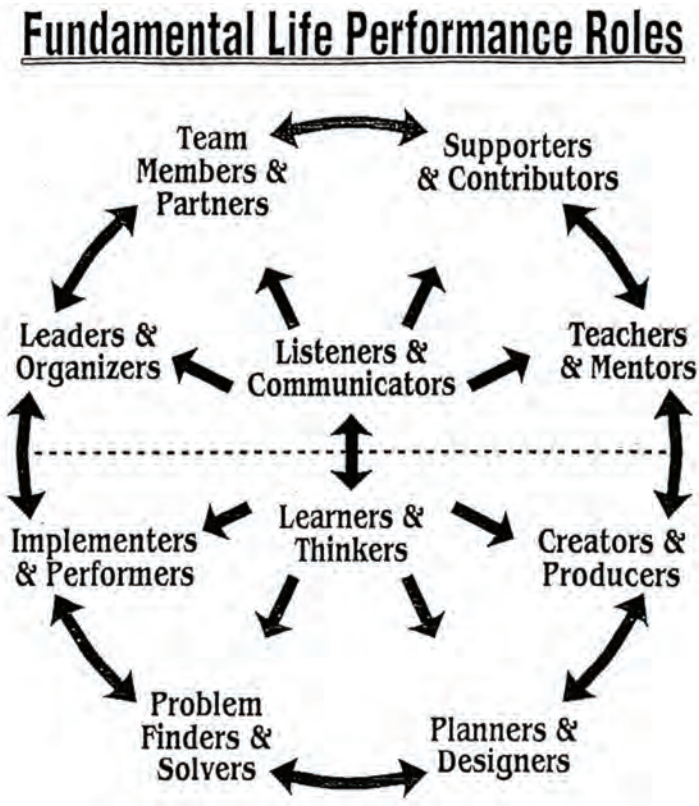
After three years of rigorous analysis and input by national labor experts, corporation heads, parents, educators and curriculum developers in the U.S, what emerged from my preliminary template is a framework that I call the **Life-Performance Wheel,** shown below. Among other things, 'The Wheel' is a sound template for future-focused OBE because:

> **It contains a rich range of role-performance abilities that every parent, citizen, and skilled professional in every field needs in today's challenging world.**

Moreover, its constellation of fundamental IQ (below the dotted line) and EQ (above the dotted line) Performance Roles allowed OBE implementers back in the day to frame their Outcomes for all levels and ages of learners and to gain an increasingly deep appreciation of the integrated nature of Role Performance learning and active classroom instructional processes.

The Wheel 'Goes Viral'

Once it gained familiarity, and once its terminology was revised to suit six-year-olds, **'The Wheel'** was subsequently used for **learners of all ages**, extending all the way down to Grade 1 classrooms. In addition, The Wheel has been a showstopper everywhere I've lectured and consulted – on five continents, especially in higher education, and in professional training programs.



The Wheel brought about huge shifts in educators' curriculum thinking and instructional strategies, and it led to the development and implementation of a very empowering classroom pedagogy that my colleagues developed called the **Action Learning Model**. With it teachers could develop students' investigation, analysis, creative, and production skills, and apply them to everything you see in the bottom half of The Wheel. And when they placed students in small learning teams, they could address and develop everything in upper half of The Wheel as well.

Not only that, The Wheel inspired dozens of local school districts to develop similar role-performance Exit Outcomes frameworks

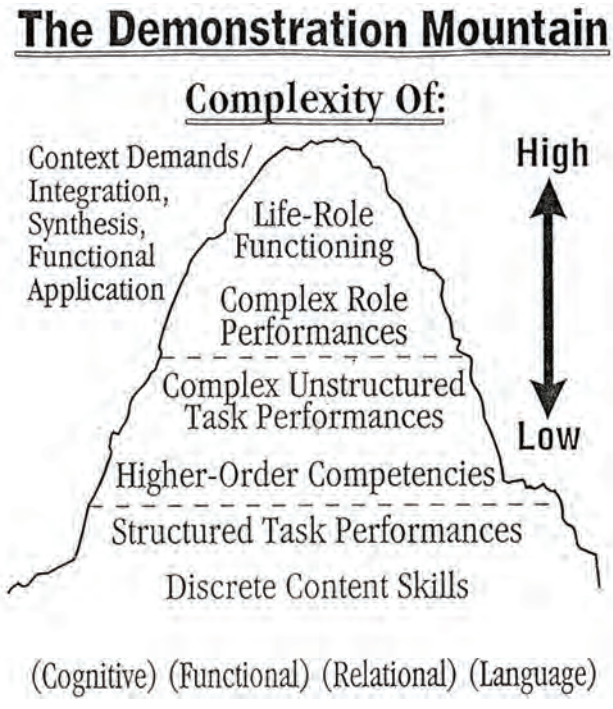
and gave teachers a paradigm-shifting example of how they could **transcend** Bloom's Taxonomy without having to sacrifice any of its previously declared power and significance. Most importantly, The Wheel served as the catalyst for the dynamic evolution that OBE has continued to undergo until this day. That future-focused, trans-disciplinary evolution is the subject of future chapters.

CHAPTER 7

Climbing the Mountain of Paradigm Transformation

The development of the Life Performance Wheel paved the way for creating another major framework that has guided OBE developments over the past three decades. We call it the **Demonstration Mountain**, shown below. Given the Mountain's many components, let's examine it closely.

Another Major Breakthrough: The Demonstration Mountain



From bottom to top, the Demonstration Mountain framework portrays the increasing magnitude, complexity and significance of six different '**forms**' that demonstrations take – from very simple, single, typical **Discrete Content Skills** at the bottom, to highly complex **Life-Role Functioning** at the top. As noted by the words on the left of the Mountain, the higher you climb, the more complex and germane a whole set of critical factors becomes:

1. The performance **context**/setting in which a particular kind of demonstration gets executed;
2. The **integration** of the content, concept, and skill elements required;
3. The **synthesis** of those elements in a role performance; andThe **functional application** of all those components in executing any given demonstration.

The 'Traditional' Lower Sector

Looking at the Mountain's bottom sector we see that Discrete Content Skills and Structured Task. Performances are both 'micro' demonstration forms, (the typical classroom context is relatively simple and deliberately isolated from 'real life'), and are expressed through homework and 'assignments' structured by the teacher. Consequently, given the way we were trying to understand and classify Outcomes back in the day, this became known as the **Traditional** sector of the Mountain, largely because of its disciplinary curriculum and teacher-controlled approach to learning.

The 'Transitional' Middle Sector

Second, Higher-Order Competences and Complex Unstructured Task Performances in the middle sector are a whole order of magnitude more complex and challenging than the simpler nature of the structured tasks in the bottom sector. Consequently, they

require/enable learners to bridge and integrate a range of content and specific skills and undertake multi-faceted projects, not simply isolated tasks. Since this greater breadth and depth of learning is consistent with an **inter-disciplinary** curriculum orientation and learning approach, we called this the Mountain's **Transitional** sector, mainly because of the name we eventually gave to the top sector.

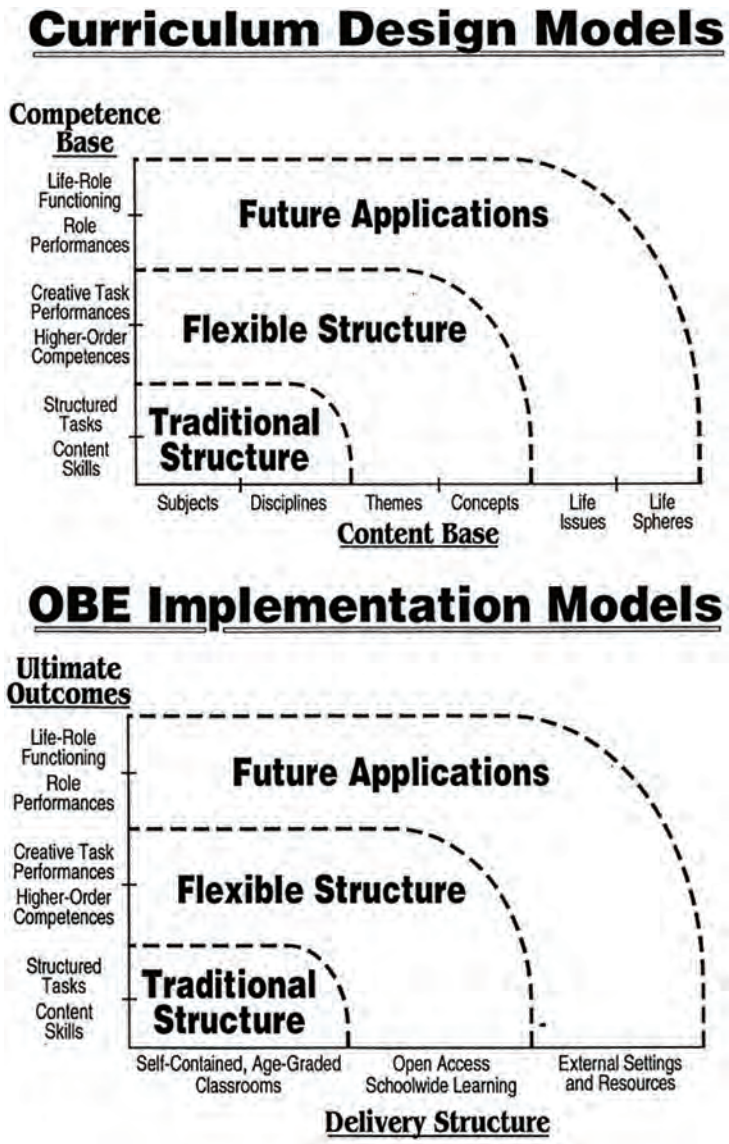
The 'Transformational' Upper Sector

Third, the Complex Role Performances and Life Role Functioning in the upper sector of the Mountain take us **far beyond academic conventions**. The demonstrations of these abilities are extremely multi-dimensional and complex, and both the content of what one learns and applies and the learning approach itself can best be called **trans-disciplinary**. That is, they lie **beyond** the boundaries of the academic disciplines themselves – like the Spheres of Living do in the Strategic Design process. Consequently, we came to call this sector of the Mountain and its Outcomes **Transformational**. Lest there be questions, the Performance Roles in the Life Performance Wheel fall at the fifth level of the Mountain – what are called Complex Role Performances there.

Given this overall perspective, I believe that conventional Curriculum-Based classroom Outcomes rarely rise above the Mountain's lower three Demonstration types, but they should not be dismissed out of hand since they can be legitimate **building blocks** for the more complex abilities above them. Some colleagues called this distinction **Learning** Outcomes (below) versus **Learner** Outcomes (above). Others called them **Enabling** Outcomes (below) versus **Culminating** Outcomes (above). If the former is considered true pre-requites for achieving the latter, their particular names matter far less than whether they have a true **'Design Down'**/ hierarchical relationship. In other words, are the 'micro' tasks at the bottom of the Mountain essential building blocks for the 'macro' demonstrations

at the top, or are they merely incidentals that reflect curriculum 'routines' rather than true 'cognitive pre-requisites' ala Bloom?

The Mountain's Implications for Curriculum and Instruction



The utility, versatility, significance, and power of the hierarchy contained within the Mountain is illustrated in the foregoing two diagrams. Note that they have the same vertical axis, and it represents and matches the six kinds of demonstrations identified in the Mountain as well as its three sectors. Think of the three areas within each diagram as denoting three different action and decision spaces – with a more constrained and limited area representing 'Traditional' OBE, and vastly larger areas representing its Transitional and Transformational counterparts. Again, please note that the Life-Performance Roles in the Wheel are at the fifth level, just below Life-Roles. Together they help define and shape the very large outer sector of each diagram.

The first diagram describes three different approaches to curriculum design that resonate well with each of the three kinds of OBE. Traditional OBE has a limiting Disciplinary orientation, while Transitional OBE is more flexible, expansive and Inter-Disciplinary. Consistent with what we learned in Chapter 6, Transformational OBE obtains its Content Base from the Spheres of Living and the Life Issues addressed in the Strategic Design process. I call this future-focused, life-oriented curriculum approach 'Trans-Disciplinary' because it moves beyond the fixed boundaries of the disciplines altogether and offers a vast array of possibilities for choosing and developing student learning experiences.

The second diagram describes typical patterns of appropriate learning contexts associated with the three kinds of OBE. Notice how those structures get more flexible, fluid, and expansive as one moves across the horizontal axis from the self-contained classroom to the school and ultimately into the community.

The two diagrams could, of course, be superimposed, one atop the other, revealing the inherently constrained and limiting nature of Traditional OBE compared with the vastly more expansive options available through its Transformational counterpart.

One system has been willing to climb the Demonstration Mountain in pursuit of its global mission, and that's a story deserving our attention because of its depth and continuing evolution.

Transformational OBE in the Philippines

You rarely discover which of your oral or written words have resonated with the people who opened themselves to the possibilities contained in them but in this case, I have. It happened at the first presentation I did in the Philippines in 2015, which I discussed in Chapter 5. I was showing the Life-Performance Wheel on the screen, and the person I'm referring to was Sister Felicitas Bernardo. She was at the event representing the St. Paul's Catholic Educational Mission (SPC), an international teaching order of nuns with schools and universities across the world.

'Sister Tas' was riveted by what she saw in the Wheel and asked to have lunch with me. All the rest isn't just history; **it moved the evolution of OBE implementation forward to an unparalleled place.** And there's no devil in the details because they're very positive and could fill a book, but not this one. I'll stick to the very high points.

First the Fundamentals, Then Exit Outcomes

Before we began really doing design work late in 2016, the principals and curriculum leaders of all 37 SPC schools and their six universities in the Philippines were given an intensive grounding in everything you've now seen in Chapters 1-4 and 6, with a lot of emphasis on 6. They seemed particularly resonant with the various Life-Performance frameworks I was showing that were based on my Five C's model. View its commonly used two-dimensional configuration is shown below:

Creativity

Compassion Consciousness Collaboration

Competence

These Five C's launched a rocket of enthusiasm when members of the SPC design team revealed that SPC also had a philosophical framework of Five C's. Since the essence of the two frameworks matched beautifully, they were immediately combined to form the grounding of all of SPC's subsequent work.

This gave the design team a clear path to developing a framework of Life-Performance Exit Outcomes for Grade 12 graduates. The design process took over a year to complete because I was simultaneously assisting their university presidents and curriculum leaders to develop Exit Outcomes for their institutions, sorting out design work SPC had done before meeting me, providing orientation sessions to each of their six 'Pilot Schools', and stepping down the Grade 12 Outcomes language for middle-grade students and again for K-3.

The SPC Grade 12 Exit Outcomes

Here are the five Life-Performance Outcomes (LPO) for high school graduates, 'operationalized' with action statements called Essential Performance Components. This is the template Dr. Schwahn and I have consistently used ever since the first LPO framework was created in 1991 (Chapter 6). To be consistent with OBE's 'Design Down' Principle, the Grade 12 framework is stepped down from a more rigorous one they created for SPC's university graduates. Both frameworks are SPC's answers to the question:

What kind of human beings do you want to 'send out the door' into today's complex, volatile world at graduation?

Their answer:

Mindful, Self-directed LEARNERS and ROLE MODELS, who:

- Initiate activities that show others that going beyond their customary ways of dealing with things is clearly possible;
- Assess their unique personal qualities, thinking processes, talents, and explain how strengthening them can open doors to continued learning and personal fulfillment;
- Explain the factors that generally affect their decisions and actions, and assess the consequences they produce;
- Manage their time and energy to allow for regular periods of quiet reflection and prayer, renewal and direction setting;
- Describe and explain the new abilities they have developed as the result of self-initiated learning experiences and projects; and
- Describe how their Catholic principles and actions mirror the qualities of a Paulinian.

Courageous, Resourceful EXPLORERS & PROBLEM SOLVERS, who:

- Seek out issues, possibilities, and sources of related information willingly for further investigation and development;
- Search voluntarily beyond readily available sources of information, resources, and standard techniques to generate new understandings towards workable solutions to existing problems;

- Resolutely understand, address and resolve issues or problems of their communities;
- Take initiative to experiment with combinations of ideas, data, materials, and possibilities to derive and test potential solutions to existing problems, even at the risk of criticism; and
- Plan and design work of artistic appeal using ideas and resources even in unconventional ways.

Credible, Responsive COMMUNICATORS and TEAM PLAYERS, who:

- Take time before speaking or writing to assess the accuracy, authenticity, and clarity of what they are about to share, its tone, and how it is likely to be received and interpreted by others;
- Consistently seek feedback from informed, credible people on the accuracy, clarity, authenticity, and tone of their communications and practice revising and restating them until they are well received;
- Acknowledge feedback from others regarding their communications and behavior, and respond honestly and constructively to it;
- Build consensus and create harmony within team endeavors, which bring benefit to all members and foster team welfare;
- Willingly share responsibilities and participate actively in fostering group collegiality, cohesion and effectiveness; and
- Anticipate where extra assistance and support for team functioning may be needed, and spontaneously offer them.

Conscientious, Adept PERFORMERS & ACHIEVERS, who:

- Devote focused time to developing the competences required both for sound achievement in a chosen field and skilled implementation in life's diverse and complex spheres of living;
- Cultivate specialized knowledge and skills in at least one area of their lives that they apply in a variety of situations with facility and ease;
- Remain focused on fully completing projects of pre-established quality in a timely manner;
- Continually set and re-set challenging improvement goals for themselves that require persistence, self-motivation, and self-regulation, and that others can continually monitor to validate what has been achieved;
- Openly demonstrate their basic and advanced skills to potential employers and improve them according to the feedback they receive.

Caring, Committed CHAMPIONS for Peace and Universal Well-Being, who:

- Initiate and sustain efforts that draw attention to environmental issues and propose workable measures to reduce and eventually eliminate them;
- Persist in the face of open resistance to their efforts to teach peace, reduce violence, and redress the harm being levied against others;
- Join others in operating local projects that tangibly protect and preserve the environment and all life forms;

- Advocate activities that foster individuality, camaraderie, and holistic well-being; that promote oneness; and that strengthen bonds with all living things;
- Call attention to the causes and consequences of poverty, and marshal others to assist those in ill-health and physical need; and
- Contribute their time, heartfelt attention, and resources in directly assisting those who live with little hope of improving their lives.

Advancing OBE Implementation Five More Steps

To assure that these LPO's actually happen for their students, St. Paul's has taken five concrete steps to reinforce their application and significance. First, they created **Affirmation Statements** for each LPO so that students could identify strongly with these performance roles – again stepped down for younger students. Here are the Grade 12 examples:

> **As a Christ-centered Paulinian,** *I am a mindful, self-directed learner and role model, consciously expressing my Faith.*
>
> **As a Christ-centered Paulinian,** *I am a courageous, resourceful explorer and problem solver, demonstrating my creativity and charism.*
>
> **As a Christ-centered Paulinian,** *I am a credible, responsive communicator and team player, building community through active collaboration.*
>
> **As a Christ-centered Paulinian,** *I am a conscientious, adept performer and achiever, competently implementing my mission in life.*

> **As a Christ-centered Paulinian,** *I am a caring, committed advocate for peace and universal well-being, impelled by compassion and charity for all.*

Second, students recite one Affirmation per day in a brief ceremony before school; repeat the recitation and discuss its relevance to them in their home room class; and reinforce it through student-created slogans, songs, skits, posters and dances about each LPO which are regularly performed/displayed in class.

Third, both the LPO's and the Affirmations are the focus of a personal student Handbook containing self-reflection and self-assessment questions about their personal growth and development on each LPO. Time is set aside each day for students to reflect on and make entries in their Handbook.

Fourth, each subject area in the curriculum has defined one or more culminating Outcomes for their Program, stating what students will ultimately be able to know and apply in their life as the result of studying that subject for twelve years. Curricula in all grade levels are being 'Designed Down' and aligned with those statements to assure that each Program's ultimate goal for students is met.

Fifth, each Program has aligned its curriculum to address and develop relevant Essential Performance Components in the each LPO, thereby assuring that the LPO's are being developed for all students directly through SPC's formal curriculum as well as the foregoing strategies.

These major steps have been developed, implemented, and refined in six 'Pilot Schools'. The dissemination of, and training in, all these practices to SPC's other 30 schools is being carried out by Sisters Felicitas Bernardo, Aileen Bonifacio, and Dedicacion Rosario. They are being assisted by a Core OBE Team of faculty and curriculum

leaders from the Pilot Schools, which I trained over a lengthy period in 2018.

Finally, work is being done to develop and implement a system of assessments and 'grading' on both their Life Performance Outcomes and their culminating Program Outcomes that includes workable High Expectation and Expanded Opportunity strategies. Hopes run high for their successful development.

CHAPTER 8

You Can't Assess What You Haven't Defined

When I arrived in South Africa in late October 1997, I was already two days behind the month-long lecture schedule the U.S. Embassy had laid out for me. Nonetheless, I was immediately whisked to a workshop where English curriculum specialists were creating program outcomes for the National Department of Education. They instantly asked me to give a short talk on OBE because it was the declared vehicle that the Mandela government was using to transform its educational system. I had been given versions of their Outcomes and strategies ahead of time and had serious doubts about its content and their likelihood of success.

Nonetheless, I gave my short talk, and was immediately invited by their National Director of Curriculum to give a seminar to the entire department on 'Assessment'. I declined her repeated invitations (over a period of weeks), partly because my now-disrupted schedule simply wouldn't allow it. Well, the schedule eventually got changed and extended, and a month later a small window of time had opened, just before my flight back to the States. During that month, I learned more and more about what was being proposed, both from studying official documents, and from 'insiders' who were eager to get my message out to the entire national system. So, armed with **one** slide, I showed up to give my seminar. It said,

YOU CAN'T ASSESS WHAT YOU
HAVEN'T DEFINED

and boy was it a paradigm-shifting experience for the few who chose to attend. I wasn't being rude, I was illustrating that they didn't have a viable Outcomes framework of any kind, so what were they going to assess?

Amidst the ensuing reactions I soon discovered that they didn't want a seminar on **'OBE assessment**' after all. They actually wanted me to tell them how they should '**grade**' students because they wanted to give up the grading system they'd inherited from the British over a century before. I couldn't and wouldn't tell them because grading, like everything else in the Assessment/Grading/Credentialing Syndrome is caught in what I call '***The Numbers Game***', and that's not about documenting learning, it's about labeling it in **a variety of misleading ways**. This chapter exposes *'**The Game**'*, confronts the false assumptions, distortions, and myths that drive its practices, and introduces a way forward for those wanting to assess Outcomes. All that in a moment.

Authentic Assessments

Since **you can't assess what you haven't defined**, from an OBE perspective **'Authentically Assess'** means:

> **Gathering evidence** that directly matches and relates to a specified phenomenon, and **comparing that evidence** against the phenomenon as it is defined.

The relevance and usefulness of this definition requires that we start with the 'phenomenon' in question and work backwards – in this case a learning Outcome. Without a tangible, observable demonstration of learning, there will be nothing for us to assess. Our assessment challenge: gathering evidence that directly **aligns** with/matches the Outcome, **word for word**.

Every word matters because the presence or absence of any given word inevitably changes the content, complexity and implications of what the action is expected to embody. Each word is, therefore, an **essential element** of the demonstration; otherwise you don't have ***that*** demonstration, you have something else. As we'll see in a moment, Essential means ESSENTIAL. This emphasis on ***alignment*** isn't meant to turn OBE into a rigid and mechanistic approach to learning. Instead, it reflects OBE's **'no surprises'** Clarity of Focus Principle, improves teacher instructional clarity and consistency, and strengthens the **face validity** of learning assessments.

Outcome Assessments Are 'Criterion Defined'

OBE implementers have consistently used the words **'criterion defined'** to describe what Outcome statements are and how they are to be treated. That means that:

> **Every word in an Outcomes statement is an essential criterion in comparing and assessing any tangible demonstration. A faulty or missing criterion means that you don't have the fully completed demonstration in front of you yet. As it stands, the demonstration is still unfinished and incomplete.**

Consequently, being criterion-defined has nothing to do with taking points off for what's missing. Since every word/element/criterion is an essential component of the expected Outcome, anything that's missing profoundly alters the whole and must be restored. A missing criterion is the equivalent of taking 100 points off!

Exposing ***The Numbers Game***

Of course, "You Can't Assess What You Haven't Defined", but **millions of educators do it all the time.**

- They simply make up/assign **points**, **scores**, and **percents** to whatever they consider to be relevant student learning tasks and achievement. Those tasks, etc. are **NOT** worth this many or that many points, but educators simply declare that they are because 'The Game' **invites** them to do so.
- Then, by pretending that all points for all that **dissimilar** learning and 'achievement' are **created equal**, they **average** them and **translate** the average into a label called a '**grade**'.
- Then they compile a GRAND AVERAGE of all those dissimilar, contrived averages (which is often calculated to the third decimal place in order to give it the aura of scientific validity) and **rank** students according to its **relative** magnitude. So, a student's actual learning isn't being recorded, but the **numerical proxies** for it are those proxies are being compared against the **equally questionable** proxies of other students.

After that the system enters those **invalid/distorted/contrived/questionable** averaging and ranking proxies on each student's **transcript** and **rewards** those with the highest proxies with either scholarships or the best jobs – allegedly because their **transcript** documents their exceptional learning/achievement. The bad news (if it can get worse) is that the **transcript** actually reinforces ***The Game*** and leads us to this piece of insight:

If they give you this much space

. . . ❒⍰⍰⍰⍰⍰⍰

to record a student's learning,

They sure must not want to know much!

And we sure don't get much either because the entire educational enterprise has been caught in this grand ***Numbers Game*** illusion for over a century. In fact, 'they' is everyone in our society who has been seduced by ***The Game***, who apparently doesn't want to know much about students' 'real' learning, and who **settles for whatever numbers fit into the small spaces on transcripts**. But 'they' have an alternative:

> Demanding the documentation of students' learning and performances that actually states something of **substance**.

Dispelling the Key Myth that Upholds ***The Game***

To reinforce my cynicism about ***The Game***, I'm inviting you to take a routine **ten-item test** with me – the kind used **in classrooms everywhere almost every week** to 'measure essential learning'. In order to grade students, we'll need a passing score, and I've chosen **80** in honor of Benjamin Bloom's Mastery Learning legacy. What I'll show you doesn't depend on the length of the test or the passing standard you set – 80 or otherwise. I've chosen ten items simply because it makes **each item 'worth' ten points**, makes the test easy to score, and requires no unusual interpretation of the resulting score. Very simply, and very routinely, students must get **eight of the ten** items correct – a score of 80 – or they 'fail' the test.

We Should Care About Our Assumptions

But before proceeding, we should check the assumptions on which our test is based.

> **First**, by assigning **equal numerical value** to each item, we're assuming that each item represents an **equally and equivalently significant** 'unit' of knowledge or

competence, that must be demonstrated. That means: Each item must be an **equally important** component of the student's learning. I'm not sure we can justify that, making this assumption **extremely doubtful**.

Second, we're assuming that the knowledge/competence base being tested consists of **ten,** and **only ten,** of these units, and that they're all **equally significant** components of the whole. This too is **extremely doubtful**.

Third, initial conclusion: If the knowledge base isn't made up of ten equal units of substance, or units of substance that can legitimately be divided into ten, then our ten items and the points they carry **don't fairly represent** the knowledge base in question. In other words, our routine distribution of points and items **misrepresents** the knowledge base in question.

Fourth, all three of these points further assume that our test, and millions like them, are ***worth*** 100 points. In reality, ***they aren't worth any number of points***. We just make that up. 100 is an **arbitrary**, but enormously **convenient**, number that's become a convention and used habitually for a couple of centuries. The points are simply human **inventions, not** the substance of the learning, and don't help us provide targeted assistance.

Fifth, we're also assuming that both the knowledge base and the items used to test it embodies what is **essential** to know or do from that learning. In this latter case, the word '**essential'** means that it **MUST** be present, so we'll watch for that. Otherwise, if the learning isn't essential, why give the test in the first place, and why are we grading it and putting the resulting grade in students' records?

Alas, since most of these assumptions are highly doubtful, the **legitimacy** of our ten-item test, and the millions just like it, is already in serious doubt.

Taking Our Routine Ten-Item Test

Nonetheless, let's proceed, with you answering the following questions with me as I pose them. And remember: **This test is not a trick! It's routinely given in classrooms and lecture halls across the world.** Here goes:

1. *Must students get the **first** item right in order to pass?* Answer: **NO**, missing the item only takes ten points off, so they can still pass.
2. *Must students get the **second** item right in order to pass?* Answer: **NO**, missing the item only takes ten points off, so they can still pass.
3. *Must students get the **third** item right in order to pass?* Answer: **NO**, missing the item only takes ten points off, so they can still pass, but **that depends** on how they did on the **previous two** items.
4. *Must students get the **fourth** item right in order to pass?* Answer: **NO**, missing the item only takes ten points off, so they can still pass, but **that depends** on how they did on the **previous three** items.
5. *Must students get the **fifth** item right in order to pass?* Answer: **NO**, missing the item only takes ten points off, so they can still pass, but **that depends** on how they did on the previous **four** items.

I could continue this exercise all the way down to the **tenth** item, but we've already seen enough about our **routine** ten-item test to draw the following sobering conclusions for which I recommend that you fasten your seatbelt. And remember, this was **NOT a trick**.

Conclusion One: It is **NOT ESSENTIAL** to get any particular item in this test right. Students can get **any two** items wrong and still pass.

Conclusion Two: There is **NO ESSENTIAL KNOWLEDGE OR SKILL** in this test**.** Since students can get **ANY TWO** items wrong and still pass, there is **no item** in the test that they MUST get right. NO item is essential.

Conclusion Three: The **ONLY ESSENTIAL THING** in or about this test is for students to get **ENOUGH NON-ESSENTIAL** items right. Although **NO** individual **ITEM** is **essential**, the goal is to get **ANY EIGHT ITEMS** right and still pass – which ones doesn't matter.

Conclusion Four: **NO TEST** with a passing standard **LESS THAN 100** is a test of **ESSENTIAL** knowledge or skill. The only thing that makes an item essential is that you **MUST** get it right. Only a passing score of 100 will assure that.

Conclusion Five: If its passing standard were less than 100, then every ten-item test ever given **in the history of the world** at any grade level has been a test of **NON-ESSENTIAL** knowledge and skill.

Yet **'routine'** tests like this one have been determining students' **grades, averages, GPA's, class ranks**, and **educational** and **career futures** ever since teachers started using **numerical scoring** to allegedly **'measure'** student learning. Without points and scores generated by test like this one, there would be nothing to average, and the legitimacy and acceptance of ***The Numbers Game*** would collapse. Therefore, it's tragic that that teachers have unwittingly spent all these generations testing what amounts to **non-essential**

learning and reinforcing the myth of points, scores, percents, and averages, when they could have been assessing Outcomes of real consequence instead. Their professional paradigm and decades of experience are grounded on ***The Games's*** myths, and they think they haven't had a viable alternative. But they do.

To move forward, they only need three things: Clear Outcomes, clear criteria, and a firm understanding of the substance they seek in **high-quality demonstrations** of student learning. Here's a possibility loaded with FACTS that addresses those things.

Assessing the FACTS of High-Quality Demonstrations

Whether they're called Stellar Performances, First-rate Demonstrations, Dazzling Displays, or Impressive Exhibitions, these are all high-quality examples of 'real' performances done in authentic contexts that share five attributes I call their FACTS. FACTS is an acronym for **five criteria** that I, as a former professional musician, consider **'essential'** components of any high-quality performance, and that's what a culminating Outcome should be. These criteria are:

Fluency **A**ccuracy **C**hallenge **T**horoughness **S**tyle

While live performances usually integrate and even blend the five, each can and should be clearly distinguished from the others for the purpose of assessing, pinpointing and giving explicit, constructive data to the performer so that they can improve. This is exactly what Bloom wanted ***formative assessments*** to do. Since each of these criteria is an indicator of **'true mastery'** in its own right, each should be made clear, explained, and modeled for students on a continuing basis.

Getting to the FACTS of the Matter

Fluent demonstrations are performances that **flow** from beginning to end without hesitations, interruptions, backtracking, and forgetting. Fluency, like the other four criteria, reflects a genuine **'command'** of the pertinent material, of the skills required, and of the setting in which the demonstration takes place. When it's Fluent, things look and feel 'familiar, natural and at ease'.

While educators are likely to pay disproportionate attention to the **Accuracy** of information and skills conveyed in demonstrations, Accuracy cannot be allowed to overshadow the other four criteria in assessing true performances. Nor can it be downplayed, simply because nothing erodes a quality demonstration faster than erroneous information and faulty technique. The ideal here is a **Fluent, Flawless** performance.

Challenge is about two key things: 1) the **degree of difficulty** of the pertinent material, of the skills required, and of managing the setting in which the demonstration takes place; and 2) their **complexity** – how many **different factors** are involved in each and must be brought together for the demonstration to be complete and successful. Here, success looks like managing and coordinating a **Complex** three-ring circus – fluently and flawlessly.

Thoroughness lives at the intersection of **Breadth** and **Depth**, and quality performances embody both. One involves **range, inclusion** and **scope** of perception and skill; the other requires focused attention to **underlying meaning** and **detail**. In fact, **Thoroughness** may more directly determine one's true 'command' and 'mastery' of an endeavor than any of the other criteria, and it may, in fact, require the greatest degree of study and practice to achieve.

Style may not sound very academic and rather superfluous to include as a criterion for Outcomes assessments, but it adds the critical elements of **flair, uniqueness, creativity, imagination, interest, appeal,** and **originality** to any performance. Moreover, **Style** stimulates the heartstrings, not just the brain cells, and it allows the performer's individual human qualities to be expressed more fully. I suggest if you want demonstrations to be **more** than 'dry' and 'mechanical', pay attention to **Style**.

With these five criteria as **essential components**, we can forthrightly tell students that our ultimate goal for them is to execute:

> **F**luent, **A**ccurate, **C**hallenging, **T**horough, and **S**tylish culminating demonstrations of learning on performance Outcomes of real significance.

Actually, that sounds just like what real professionals in any discipline do to gain the esteem of their colleagues and clients, so I'll proceed with that as my template. Should academics decide that **Fluent** and **Style** are unimportant criteria, they are left with **Accuracy, Challenge,** and **Thoroughness** (ACT) and should settle for nothing less!

Applying the FACTS to Assessment Rubrics

One of the most common strategies for assessing learning over the past two decades is the use of what are called Rubrics. Conventionally, Rubrics are matrices that portray the **essential components** of a performance on one axis, and the **levels of** performance **quality** on the other. Although there is no formal rule about how many essential components there might be in a given demonstration, educators often choose five for their Rubrics. Nor is there a rule about how many levels or qualities of performance one should document in a Rubric, but the convention is four, which yields a matrix with twenty

cells. Finally, there's a third convention that involves points, scores, and weighting factors, and I'll address that shortly.

The good news about Rubrics is that they can conscientiously and consistently be used by teachers to implement OBE's Clarity of Focus and High Expectations principles on whatever Outcome or objective they may be addressing at the time. By seeing the Rubric ahead of time, students learn about the Outcome's components and what a 'stellar' performance will require from them. And, Rubrics also guide teachers when they use them at the outset to define and focus on an Outcome's essential components and various levels of performance quality. With those factors already mapped out, the Rubric becomes a template for guiding teaching, learning, assessment, and even record-keeping. The hypothetical Rubric below illustrates these points.

Fluency	**Accuracy**	**Challenge**	**Thoroughness**	**Style**
Seamless flow, no hesitations	Full command of required material and skills	Clear mastery of complex info, skills and setting	Broad, detailed command of info and skills	Pervasive display of originality and creativity
Good flow, minor hesitations	Minor mistakes and execution errors	Complexities integrated and managed well	Some related details and skills incorporated	Clear elements of individuality and imagination used
Notable hesitations and uncertainty	Notable errors in basic knowledge and skills	Only routine processes and info handled well	Little beyond defined skills and concepts used	Glimpses of individuality and creativity present
Uncertainty and hesitation breaks throughout	Significant errors and slips throughout	Mastery of only basic processes and material	Only surface information and skills used	Straightforward display of skills and information

Tracing the Two Patterns

There's a lot to absorb in the sample Rubric I've created, so I'll focus first on the five FACTS just described. They're arrayed at the top of each vertical column and represent the five ESSENTIAL components of my hypothetical Outcome's performance. Since I have declared them to be essential, in this instance **all five** MUST be done well. Although I've chosen to use the FACTS as essential components in this example, **there may be compelling reasons for faculty to specify essential components other than these for their Outcomes**, and the number of components could vary as well. In that event, their components would be the main 'definers' of the desired student demonstration, and the component names would be placed at the top of each column.

Next, start at the bottom of any column and study the words in each cell as you go up, row by row. You'll notice a decided step-by-step **improvement** in the quality of the performance being described. Although the specific words used will vary according to the component we are viewing, the **pattern of quality variation** should increase **consistently** within each column. The highest **'stellar'** quality should appear in the top cell and the lowest **'fully inadequate'** quality at the bottom. Since this pattern is repeated in every column, we can readily see that the **rows** of this Rubric consistently represent the four distinctive quality **levels** that I've chosen, remembering that there can be more or fewer than four. Four is simply a convention, but a prudent one.

Take a minute to trace these two patterns, noting that the words in the twenty cells are not 'perfect'. I claim nothing more than they 'fit' the FACTS and the four levels of performance quality reasonably well, and they 'fit' in the small spaces allowed.

What Does It Mean to 'Pass'?

What, then, does it mean to **'pass'** when you use Rubrics as criterion-defined templates rather than using points and scores? In this case, the 'quality words' I've chosen create an observable dividing line between the Rubric's second and third rows. When a student's performance on a criterion reaches the third level from the bottom, we can say that she or he has reached the 'passing' standard for that criterion. However, since all five components are deemed 'essential', any performance in which **ANY ONE component** is assessed to be in the bottom two rows keeps the demonstration in the **Incomplete/ Inadequate** range. Why? Because the component/criterion in question still needs substantial improvement, whichever single one it might be. Therefore, from this criterion-defined perspective:

> **Inadequate performance on just a single essential component undermines the entire demonstration and must be brought to a minimally acceptable level before the demonstration as a whole is deemed 'competent'**.

At a minimum, then, OBE wants 'competent' performances to reach **at least** the third row **up** from the bottom on ALL specified criteria. So, let's remember that a key purpose of the Rubric is to provide **substantive guidance** to both teachers and students for continued High Expectations **learning** and **improvement**.

Since the same Rubric can be used multiple times,

> It indicates where the student currently stands in their learning and what the **next** level of accomplishment is on each criterion, and
>
> It serves as both an accurate and relevant **record-keeping** device and potential learning guide, indicating to both

teacher and student what the **next necessary learning/ improvement steps** are.

But please remember OBE's ultimate goal is having **every student eventually reach the 'stellar' level** in the top row on **ALL** essential criteria, where words like **outstanding, exemplary,** and **masterful** reside. Reaching this exemplary level brings **all four** of OBE's Principles directly into play and allows **What** and **Whether** to override **When** and **How** as the ultimate definers of success.

Please Don't 'Score' Assessment Rubrics

Now I'm going to seriously break convention and advise you **NOT to score any Rubric**. Why? Because conventional ways of scoring can lead to **faulty** and **misleading conclusions** and grades. Here's what can happen.

First, following convention, every cell in the bottom row gets **1** 'scoring' point; every cell in the row above gets **2** points; every cell in the row above that gets **3** points; and the top row cells all get **4**. This creates a potential scoring range between **5** minimum and **20** maximum.

Second, there are only two scores that reveal anything **of actual substance** about the demonstration. With a score of **20** you know that all five components were achieved at the 'stellar' level, and with a score of **5** you know that all five were achieved at the lowest level. **But all of the other scores, from 6 through 19, reveal nothing about the actual substance of the demonstration.** Why is that so?

Third, because, for example, mathematically there are **five** different ways of getting a **6** or **19** and fifteen different ways of getting a **7** or an **18**. You're very likely to be impressed with the **18** and will want to give it a high grade, **but don't**. Again, why? Because **five**

of those fifteen ways include getting only a **2** on one of the five **essential** components, which means that the demonstration is still **Incomplete/Inadequate** by OBE standards, and you won't know from the score alone which component still needs further intervention. ***The Numbers Game*** says they pass with a high grade, and OBE says "They haven't even 'passed' yet."

Which is it to be?

Consequently, I strongly support using well-defined Rubrics to:

- Strengthen OBE's Clarity of Focus and High Expectations principles
- Shift education's prevailing paradigm
- Identify the essential components of an Outcome
- Assess and record the results of learning demonstrations
- Pinpoint areas for improvement
- Document levels of performance quality

But as vehicles for generating scores and grades, they're no better than 'routine' ten-item tests and all the misleading myths that constitute ***The Numbers Game***. So **run**, don't walk, from scoring them.

PART 3

Awakening OBE's Empowering Essence

CHAPTER 9

Evolving Toward Outcome-Based EMpowerment

There are no 'perfect' adjectives to describe the speed, volatility, and depth of the **revelations** my colleagues and I were experiencing during the five-year period between 1986 and 1991, nor how often and quickly we were being compelled to **redefine** and **reframe** the cutting edge of our work.

> In February of **1986**, OBE was advocating that all **students** master **C**urriculum **B**ased **O**utcomes defined as specific, small **C**ontent **B**ound **O**bjectives in virtually all subject areas and grade levels in order to be **successful students**.
>
> In February of **1991**, OBE was advocating the development of **learners** as **human beings,** equipped with the competence and character to meet the future, **regardless** of the 'official' curriculum they had taken and how they had fared learning it.

In searching for words to describe what we had just gone through, my colleagues usually said **"Traditional"** about everything that we had been doing prior to 1986, and **"Transformational"** for all of the things that happened after 1991. But after 1991 we were experiencing one transformation after the other, week after week, as we kept building on our latest work. All we knew was that:

> Our working model of learning and human potential had expanded profoundly from where we had been just a few years earlier;

> Every new major revelation/paradigm shift seemed to make everything that had preceded it **obsolete** almost overnight, thereby rendering it **"Transitional".**
>
> **There seemed to be no end in sight regarding what else was possible**. What we called Transformational one day was destined to become Transitional soon after.

Staying Open to More Revelations

I think that our biggest concern at the time wasn't that we were getting 'too far ahead of the parade' with our continual leaps ahead; it was that we really weren't learning all that we needed to know to be up to date and credible fast enough. Since our focus had shifted to human beings and not just the curriculum and academic skills, we underestimated how deep human attributes and potential could ultimately go, and how much that shift called into question culturally endorsed, *educentric*, conventional, thinking.

We knew that we had 'jumped the gun' on the word 'Transformational,' but we didn't know how much our work would continue to evolve if we remained open-minded and open-hearted about human capacities, learning and life. This evolutionary journey required us to ***transcend*** what we meant by the word 'Transformational' in the first place.

Assessing Two Parallel Evolutions

If we were to regard 1991 as the OBE's official jumping off point from curriculum-bound thinking about the fundamental purpose of education, then the decade that followed opened vistas about human capacity to me that were beyond conventional comprehension. Much of this was spurred by my own inner explorations and the revelations that emerged from them. Both are captured in my

2013 book ***Opening to Greater Realities***. They, in turn, dramatically expanded my understanding of what lay inside of all of us, dormant and undiscovered perhaps, but an innate part of our potential as humans.

And so, early in the Millennium, when I began to analyze and map the different distinctive phases that OBE had gone through since 1980 or so, and what the essence of each phase represented, I was unable to separate it from what I was now seeing from a much vaster perspective. That original mapping helped me realize that our 'transformational' work and our ability to represent it coherently was still lacking some important elements.

A New Knowledge Base for OBE

In order to close this gap, I called together a group of distinguished, widely-published **learning psychologists** in 2007 and asked them to integrate and synthesize the cutting edges and bottom lines of their most advanced work – most of it having nothing to do with my work or OBE. The task we quickly set for ourselves was to consolidate the most cutting-edge theory and research about learning into an 'enlightened' declaration of how American/modern education should proceed in the 21st Century.

Following the substance and spirit of OBE's **Pillars of Power**, I asked them to translate this new synthesis into a set of Premises, or fundamental assumptions, about humans' innate nature and capacity to learn, which could serve as the foundation for developing a truly transformational model of 21st Century education. Here are those Premises:

- HUMANS are born curious and naturally explore life and their world,
- HUMANS vary greatly in their rates and ways of learning,

- HUMANS are born social, and their learning is naturally influenced by others,
- HUMANS can learn, create, and change throughout their lives,
- HUMANS naturally use all their senses to learn,
- HUMANS can take charge of their thoughts and emotions,
- HUMANS naturally appreciate and seek to create quality and beauty,
- HUMANS can transcend their perceived limitations,
- HUMANS can naturally access and utilize their innate inner wisdom, and
- HUMANS' capacities for intuition, insight, imagination, and creativity are inherent, powerful, and unlimited.

As I later reflected on each of these ten bold statements, I was particularly struck by the last two, especially the words **"innate inner wisdom"** and **"inherent, powerful, and unlimited."** The message those words were sending literally shouted out at me:

> **Humans are born with vast, powerful inner wisdom, and we don't recognize it! We think that children basically know nothing and have to be taught everything 'we' know in order to succeed and thrive. At its best that is ego-centric, culturally-biased thinking.**

INpowerment and EMpowerment as Mega Paradigms

That revelation put my unfolding evolution story in a new light, and two rather crazy new words quickly came to me: **INpowerment**

and **EMpowerment**. When they did, I quickly realized that the concept of **empowerment** is widely **misunderstood** and **misapplied** today. Simply put, people cannot **empower** other people by doing things for or with them; **individuals can only empower themselves** by standing up for and taking responsibility for who they are, what they believe, and what they actually do.

Despite the often-heard rhetoric to the contrary, humanity's virtually universal mega-paradigm of education doesn't empower, it '**INpowers**' by consistently:

> Putting **INto** the heads of children what we adults are convinced they need to know in order for them to survive and succeed in our tangible, challenging world.

From this perspective, we act as if children have no capacities or sense of how to function fruitfully in our world unless we put our customary understandings of things INTO their brains. This may assist them to understand things they didn't comprehend before, but it's not empowerment; it's **intergenerational transmission** and **cultural conditioning** – leading in many cases to **'paradigm blindness'**.

Transmitting Our Paradigm Blindness

Although we rarely view it that way, humankind's traditional, historic, orthodox, archaic, and limited beliefs and understandings about human origins, capacities, life, and the universe continue to be **transmitted** to the younger generation both through family and cultural socialization and our formal, organized, culturally-endorsed education systems. This INpowerment process happens generation after generation, and its ingrained patterns of thinking and living are mistakenly called **'human nature'** and then accepted as **'normal'** ways for humans to view themselves, the world and how to interact.

The alternative, **EMpowerment**, implies that little if any of the foregoing is actual 'human nature' because the ten foregoing Premises paint a far more expansive and accurate picture of our true nature and capacities as humans than do our generationally-transmitted beliefs. So the question arises:

> What kind of OBE (or other kind of education) system would honor and nurture this EMpowering view of human nature?

An Emerging Ideal

After wrestling with this question for some time myself, I asked a large international group of progressive educational reformers to address it with me. Their helpful suggestions strongly affirmed the direction that OBE had been moving and supported my view that such a system should:

- Honor the diverse backgrounds and intrinsic talents, interests, motivations, and deep inner essence of each individual learner,
- View human learning as innate, multi-sensory, and holistic,
- Encourage novel, creative thought, problem framing, and problem solving,
- Optimize the conditions and organizational supports that foster learning successfor every learner,
- Integrate the holistic, seamless nature of life experience, knowledge, and identity,
- Respect the brain's natural propensity for meaning, harmony, and organization,
- Probe deeply into the innate potential of the mind-body system and the social and cultural influences that stress and undermine it,

- Explore significant avenues of human potential and life experience overlooked in conventional academic curricula,
- Engage deeply with nature, the ecosystem of the planet, and one's role within it,
- Utilize the benefits of collaborative exploration, activity, and work in real-life contexts,
- Develop higher-order thought processes and complex life-performance abilities in all learners, and
- Engage deeply significant ethical and moral issues directly and offer feasible ways to address them.

Clearly, these twelve statements reflect the vision of a learning system that transcends established academic parameters. Implementing them will provide an enormous challenge to any conventional educational system, no matter how progressive its leadership and faculty. Realizing this, I was compelled to re-assess and revise the mapping of OBE's evolution that I had begun years before.

Mapping OBE's Paradigm Evolution

In this initial mapping framework I identified five distinct configurations of how Outcomes, curricula and instructional systems had come together. Then came the two years of meetings with my expert learning psychology colleagues that produced these twelve statements and ten new Premises. In addition I had to take into account, integrate, and synthesize two new mega-paradigm words, and an avalanche of my own inner experiences and revelations. A major revision seemed inevitable.

An Initial Published Revision

An updated version of the framework appeared in Chapter 1 of my 2014 book ***Bringing Heart and Soul to Education***, but my

understandings of OBE's evolution continued to deepen. Eventually I had two major insights about it all: 1) I needed a new set of 'T' words other than Traditional, Transitional, and Transformational, which seemed no longer applicable to the complexity of the concepts I was analyzing; and 2) After all that integrating, I was looking at **six distinctive stages** of that evolution, each reflecting a different philosophical and operational grounding and paradigm of OBE. Those stages involved:

OBE's **Academic Excellence** Paradigm and its CONTENT Based focus;

OBE's **Analytical Thinking** Paradigm and its CONCEPT Based focus;

OBE's **Applied Performance** Paradigm and its COMPETENCE Based focus;

OBE's **Life Challenge** Paradigm and its CONTEXT Based focus;

OBE's **Unbounded Exploration** Paradigm and its COSMOLOGY Based focus; and

OBE's **Inner Awakening** Paradigm and its COHERENCE Based focus.

I'm trusting that the four 'C' words at the top of this list should be self-evident, given the explanations of OBE's evolution provided in Chapters 2, 3, 4, and 7, but the words 'Cosmology' and 'Coherence' may not be. Very simply, **Cosmology** is about the study of our universe, its nature, and all that's in it, including we humans and our deepest innate capacities – freed from the limitations of conventional Newtonian thinking. **Coherence** is about the state of complete

harmony and attunement that is achieved when people realize that their inner potentials and capacities exceed the boundaries of our tangible, physical lives. Think of it as an extension and expansion of what Maslow calls 'Self-Actualization' (see Chapter 11).

Three New 'T' Words

Happily, the new 'T' words that accompany these six configurations further reinforce this interpretation. I considered the first two of these six Paradigms to be manifestations of OBE's **'Theoretical'** essence, when its proponents still viewed Outcomes as being purely Cognitive and only requiring various kinds of one-dimensional mental processing. This original approach to OBE is described in Chapters 2 through 5 and was a noble attempt to break out of education's time-based, assembly-line template. Although it was not directly mentioned there, these two Paradigms were shaped by the question:

> What do **we** want students to learn (that **we** know how to teach) if **they** are to advance to, and succeed at, the next level of their education?

And, as explained in Chapter 3, the very definition of OBE as an operating system was formulated around the four Principles described there as if they represented ***'Declaration of Independence'*** statements from this entrenched Industrial Age way of educating. In very simple form, those original, familiar, and universally used defining Principles of OBE are:

> **Clarity of Focus** on Outcomes of Significance
>
> **Expanded Opportunity** for All to Succeed
>
> **High Expectations** for All to Succeed

> **Design** (the curriculum) **Down** from Where You Want Students to End Up

For forty years OBE advocates have stated that these four Principles define authentic OBE implementation and practice and will expand 'The Conditions of Success' in schools if applied Consistently, Systematically, Creatively, and Simultaneously in all grade levels and curriculum areas.

Tangible Paradigms

The middle two Paradigms clearly reflect OBE's strongly **'Tangible'** essence, which arose out of the 1986 definition of Outcomes as concrete demonstrations of Competence that inevitably plays out in 'real life' Contexts. The several design questions mentioned in Chapter 6 that influenced how educators derived these kinds of Outcome frameworks can be summarized this way:

> What challenges and opportunities will our students face in their lives and careers, for which they must be prepared if they are to thrive as young adults?

This question implied that the purpose of education was no longer simply to prepare students for more education; it was to prepare them for a future that was both rapidly changing and dramatically unlike the past. As noted earlier, this was something that the required curriculum and the educators of the day were initially unprepared to either address or accomplish.

In light of this dramatic shift in perspective and priorities, it would have been ideal to imbue OBE's four defining Principles with this same relevant, future-focused orientation at the time that all of this was unfolding, but that never materialized. Nonetheless, as we OBE leaders have continued to state and reference the original four

Principles for these past thirty-plus years, I believe we were implicitly advocating the Consistent, Systematic, Creative, and Simultaneous application of more evolved, relevant and aligned Principles such as these:

> **Clarity of Focus** on Future Role-Performance Abilities of Significance
>
> **Continuous Opportunities** to Engage in and Develop Role-Performance Abilities
>
> **High Engagement** in Authentic Contexts that Advance Performance Abilities
>
> **Bring** Role-Performance Learning and Engagement **Down** to Young Learners too

This implies, then, that from this point forward, these four restated Principles should become the driving force in any contemporary OBE endeavor wanting to be relevant and 'equip all of their students with the capacities role-performance abilities needed in the future they will be facing'.

Transmutational Paradigms

The remaining two Paradigms in this evolutionary framework are **'Transmutational'** – a very new word for OBE implementers, which requires some additional explanation.

> (Thanks to deep discussions with wise colleagues, I looked more deeply into the meaning and implications of the word Transformational and discovered that it's the **wrong word** for what we we've been implying about it for thirty years. 'Transformation' involves altering the **outer**

> **appearance** of something, which our work certainly did, but it doesn't really imply changing its **inner nature**. The proper word for that is **TRANSMUTATION**, and that's what we've really meant about the nature our advanced work all these years.)

As we address the two Paradigms that fall under the umbrella of this new T word – **Unbounded Exploration** and **Inner Awakening** – we should note that they represent an even greater departure from conventional educational thinking and practice than do the TANGIBLE performance-based pair. This new pair not only removes the boundaries concerning what and how learning should take place, they also place the learners' essence, potentials, interests, and control of the process on center stage at the same time. In short, they are the catalyst of the INpowerment-EMpowerment shift noted earlier.

It is here that OBE's new focus on Learner EMpowerment has spurred a new driving question and opened the gateway to yet another set of defining Principles. Both reflect a paradigmatic transmutation of what it means to educate and how to go about it. The question now facing educators and fueling the fires of deep discovery is:

> How can we best stimulate learners' vast potentials and model deep excursions into the essence of one's inner power and experience of life?

Underlying this question is the assumption is that children possess as yet undiscovered and unacknowledged capacities that deserve exploration and further development – key points made explicitly earlier in this chapter. This conviction, in turn, invites yet a further transmutation of OBE's original four defining Principles. Shown below, they are now framed to yield answers to that challenging question. They are:

Clarity of Intention to Cultivate Learners' Vast Potentials, Curiosity, and Interests

Limitless Opportunities for Igniting the Realization of Learners' Potentials

Open Invitations to Explore and Deepen Learners' Identities and Insights

Bring Out Learners' Intrinsic Capacities and Motivations for Empowered Living

Guided by these new Principles, education can finally become 'Learner Centered'.

A New Mapping of the Paradigms

INpowerment and EMpowerment operate on a continuum of sorts. The more you have of one, the less you have of the other, but neither is totally absent in any learning model. Clearly, the **pre-1986** Academic Excellence/Content Based configuration belongs at one end of that continuum, and the **post-1991** Inner Awakening/ Coherence Based configuration belongs at the other. So I began listing other attributes that aligned well with these two ends of the continuum, and as these two lists became longer, I chose to place the most significant attributes in a diagram that resembles a children's 'teeter-totter'.

For now – in 2020 – that diagram contains and summarizes OBE's evolving journey – one might say, 'in the modern era' leading to the future.

Interpreting the Teeter-Totter Diagram

Please know that this teeter-totter diagram is more 'intuitive revelation and insight' on my part, rather than an attempt to 'make things fit' a predetermined symmetrical pattern. Assimilating all of

the things in the diagram will become easier if you take special note of the following.

First, the six paradigms shown above the teeter-totter evolved historically from left to right, beginning with Bloom's "Theoretical" Content-Based Mastery Learning work in 1968 and evolving through the two "Tangible" Paradigms in the middle, and onward toward the two recently emerging "Transmutational" Paradigms on the right.

Second, to better grasp all of the words below the teeter-totter, work your way down the list of significant attributes that are listed in the center, directly below the teeter-totter's fulcrum. There are ten of them, beginning with **Instructional Approach** at the top and ending with *Learning Opportunities* at the bottom. Although every attribute is significant and distinctive, there is no assumed order of importance from top to bottom. Think of them as an integrated system.

Third, consider the nature and qualities of those ten attributes in the left hand column under the words: *Paradigms that stress the transmission and acquisition of* ***accepted knowledge***. At the top of the listing you will find **INpowering,** and *Structured/Limited* at the bottom. Those ten attributes primarily characterized what OBE embodied prior to 1986, but increasingly less so over time as you move across the diagram to the right.

Fourth, then consider these same attributes as portrayed in the right hand column under the words: *Paradigms that invite the exploration and expression of* ***awakened potentials***. There we see **EMpowering** at the top of the list and *Open/Responsive* at the bottom. From my vantage point, all ten of these right-side attributes align very well with the ten Premises and twelve operational characteristics noted earlier in this chapter. In short, they describe the 'ideal' that today's still-evolving OBE seeks to embody:

An EMpowering mega paradigm that honors the innate attributes of human beings and implements an operational system that further supports and expands those attributes with no predetermined limitations.

For this Transmutational ideal to come to fully into fruition, we have to consider four additional things that are either missing from, or could be changed in, the existing diagram.

Further Considerations

First, in today's world there's an invisible 400 pound gorilla sitting on the far left edge of the teeter-totter. He's seated backward looking resolutely toward the Industrial Age past from which both education and OBE have struggled to emerge, and he has a name: ***Orthodoxy Based Educentrism***. I described many of his key attributes in Chapters 1 and 5 without specifically identifying him or giving him a name.

Second, because of his enormous weight, the level teeter-totter you see in the diagram is actually tilted down to the left as far as it can go, reflecting the enormous **institutional inertia** that favors the INpowerment instructional approach to OBE and all of the other attributes associated with it.

Third, there is yet another Paradigm of OBE to consider that is held suspended in mid-air by the hopes, dreams, and awareness of a small but growing group of Transmutational/EMpowerment oriented OBE leaders and implementers. At this point in time it remains OBE's unrealized Paradigm, but its grounding and rationale are every bit as real as what we've seen here for Transmutational OBE. Reaching it requires just one more leap of imagination.

Fourth, now picture the tilted teeter-totter as actually being a spring board that has just launched this new unseen Paradigm into

an energy space that exists high off of the right tip of the board, using **Coherence-Based Inner Awakening** as its departure point, and humans' **innate,** powerful, **unlimited capacities** for intuition, insight, imagination, and creativity – the words in that tenth Premise from 2007 – as the catalyst.

Little did I realize back in 1998 how deeply the words **'inherent, unlimited, intuition, and insight'** would take me on my own personal journey into the universe of vaster awareness, perception, and consciousness in those subsequent years. Had that inner journey not unfolded the way it did, OBE's evolution might have stopped two decades ago, and I would still be asking myself, 'What lies ahead on OBE's evolutionary path'? I can begin to answer that question now by referring you to Chapters 11 and 12, which lead us to something called **'Transcendent'** OBE! But be sure to read Chapter 10 first. It's about the spring board needed to get us there.

CHAPTER 10

Iowa BIG: A Transmutational Exemplar of EMpowerment

Iowa BIG is a high school program enrolling about 220 students from four neighboring public school districts in and around Cedar Rapids, Iowa. It was launched in 2012 with a dozen students seven years ago by its director Trace Pickering and his co-founder Shawn Cornally and continues to grow each year. To optimize its close-knit community atmosphere, 'BIG' currently operates at two key sites and will continue adding sites to keep the enrollment at each below 125 and at a 30-1 student faculty ratio.

A Remarkable Convergence of OBE Components

To understand why I consider Iowa BIG a 'Transmutational Exemplar of EMpowerment,' we need to bring seven key aspects of OBE forward from the book and integrate them fully.

First, the OBE Teeter Totter diagram from Chapter 9.

Second, OBE's 'Design Down' Principle from Chapter 3.

Third, the first-ever Life-Performance Outcome framework in 1991 from Chapter 6.

Fourth, performance learning that is grounded in life Contexts from Chapter 6.

Fifth, using assessments as 'formative' and diagnostic, ala Bloom from Chapter 2.

Sixth, OBE's High Expectations and Expanded Opportunity Principles from Ch. 3.

Seventh, openly exposing the CBO Syndrome from Chapter 5.

First, BIG's fundamental, grounding, paradigmatic starting point is the set of elements and attributes at the far-right side of the Teeter Totter. BIG's Mission is to **"Unleash human potential."** Given the language in this book, that translates into: The Coherence Based/Inner-Awakening of students to their vast inner potentials, capacities, intrinsic motivations, and personal power to create the lives **they** want to live – NOT that others want them to live.

It's about taking ownership and responsibility for your own life. It's yours and no one else's. It's what YOU CREATE, not what others do to or for you! That is the essence of EMpowerment and everything on the list of attributes below it, and BIG is uncompromising about that vision for its students.

Second, BIG has Designed its learning system DOWN from there, putting in place all of the aligned building blocks, components, and processes that will get students to that end – the Inner Awakening of their authentic selves – IF they want to be EMpowered. It's their CHOICE.

Third, BIG has built an organizational culture around, and designed a learning framework, that DIRECTLY fosters, supports, and sustains . . .

Self-directed LEARNERS

Collaborative WORKERS

Complex THINKERS

Community CONTRIBUTORS
Quality PRODUCERS

. . . because that is exactly what it's learning experiences intentionally foster and develop. It's as if the 1991 life-performance framework sought and finally found an 'exemplary' home.

Fourth, because student learning projects are team-based and proposed by and address the priorities of the BIG community's organizational partners, they are grounded and carried out in authentic, real-world Contexts. This adds far more relevance, complexity, and challenge to the learning process than traditional classroom academic work offers and highlights and enhances the significance of all five life-performance Outcomes just noted.

Fifth, the underlying ethos of BIG's learning system is for students to continually improve both the quality of the work they undertake over time and the processes of collaborative endeavor and team learning. This is implemented through a timely, continuing system of diagnostic 'formative' assessments to which no 'grading' is attached. This removes the fear of 'failing' (and thereby choosing 'safe' or 'easy' projects in order to 'pass'), and encourages clear, candid self-assessment of both individual and team performance.

Sixth, imbedded in this fifth attribute are BIG's High Expectations for quality work, effort, and learning and its ethos of continuous, Unlimited Opportunity to improve how you function and perform. 'Failure' is not a permanent condition or social stigma. Instead, it's simply a word reminding students that their current approach to things can improve, and an incentive to figure out how.

Seventh, given all of this, BIG created and maintains a culture and mindset among both staff and students that openly and forcefully exposes the weaknesses, disempowering nature, and seductive appeal of everything in the CBO Syndrome . . .

Curriculum **B**ased **O**utcomes
Content **B**ound **O**bjectives
Calendar **B**ased **O**pportunities
Cellular **B**ased **O**rganization
Convenience **B**ased **O**perations
Credit **B**ased **O**bsession
Convention **B**ound **O**bsolescence
Culture **B**ound **O**rthodoxies
Compliance **B**ased **O**rientations
Control **B**ased **O**bedience

. . . reminding students that this Syndrome defines and governs the public school they attend for half of each day before coming to BIG. It's a Syndrome that rapidly traps students into a Paradigm of dependence, compliance, getting by, and manipulation – a Paradigm that's hard to shift because it's so prevalent in our society, but BIG counters it at every turn.

The *Guidebook's* 'Clarity of Focus'

Every aspect of the Iowa BIG philosophy, operating principles, instructional system and strategies, culture, relationship to the community, and linkages to state and local school district standards and requirements is spelled out in a lengthy *Guidebook* made available to all prospective students, their parents, and BIG's growing number of community partners. In the spirit of OBE's Clarity of Focus on Outcomes of Significance Principle, it makes clear what BIG is and isn't, how it operates, and what students can expect by attending.

Anything other than a casual 'skim' of the *Guidebook* indicates that BIG is neither 'easier' than conventional high school's demands,

nor is it 'harder.' Very simply: It's DIFFERENT. One cultivates a compliance oriented INpowerment approach to academic learning and success, and some students thrive in that structured environment. The other cultivates an initiative-oriented EMpowerment approach to continuous improvement in all aspects of living in which the issues confronted and problems addressed are far more ambiguous and 'messy'. Instead of students getting 'right answers' they're required to find creative and viable 'ways forward' that still contain risks. Dealing with the authenticity of such life challenges over a period of months and years awakens and matures some BIG students in incredible ways, and leaves others retreating to the relative predictability of conventional high school life.

BIG's Core Philosophy of Learning

> Iowa BIG believes that robust academic and "soft skill" learning can and does happen "in context." That is, students can and should be able to build skills by working in the "real world," doing real projects, and seeing how their English, government, sociology, math and biology subjects (for example) appear and work in messy, real world contexts.
>
> We follow the growing research around how the brain, particularly the teenage brain, learns and functions. This is a time when young people need to be offered and accept more agency - ownership - for their own lives and learning. It is a time when they are beginning to see themselves less as part of a group and more of an individual person with their own goals, abilities and interests. It is also the right time to help them gain competency –the ability to do things and learn by doing and, in doing so, begin to help shape and define the values they hold about work, people, and life. Important as well, but secondarily to the

things above, are self-regulation, knowledge and skills, and mindsets. We work hard on those too.

Engaging students in real world projects gives them all of these opportunities in a safe-to-fail environment where the only goal is learning and development. BIG believes strongly in experiences as a vehicle for learning deeply.

Iowa's Universal Constructs

The *Guidebook* further states:

> The following Universal Constructs were identified as the competencies and habits of mind needed for future success in careers, college and citizenry by the Iowa Department of Education. They are often referred to as 21st Century skills and are front-and-center at BIG. Since they are regularly assessed by teachers, our goal is to ensure students have continuous opportunities to practice and hone them.
>
> Since students will be asked to constantly reflect on and assess their improvement on them, we ask that they make note of when they are engaged in these things. They provide great evidence of learning and progress. . . Since we know that it is a person's competence and confidence in the Constructs that usually makes them successful or fall short, we want to ensure that our students are highly competent in them as they exit high school.

Complex Communication	Productivity and Accountability	Critical Thinking	Creativity	Collaboration	Flexibility and Adaptability
Perform Plan Interpret Refine	Meet deadlines Rehearse Create in a timely manner Self-evaluate Reflect Self-motivate Fulfill one's role and responsibility	Analyze Evaluate Compare / Contrast Listen Interpret Synthesize Reflect Value	Improvise Compose Create Imagine Plan Design Problem-solve	Perform Arrange Organize Listen Show Respect Accept responsibility Share	Listen Revise Modify Interpret Follow directions Follow leaders Experiment

BIG's Direct Message to Prospective Students

The *Guidebook* also sends a clear, explicit message about what students should expect at BIG:

> You're here to:
>
> Create your own unique story and build a powerful resume
>
> Develop a high-demand professional skill set
>
> Develop and document course standards and competencies
>
> You will get there through:
>
> Community based projects with real outcomes and impact
>
> Compelling customized seminars and workshops
>
> Personal passion projects and/or explorations

Getting the Most Out of BIG

Dr. Pickering reports that about a third of BIG's students see this declaration as an exceptional opportunity to allow their personal interests, identity, and potentials grow and flourish, and they thrive in remarkable ways. All BIG graduates qualify for college admission, and a few have been admitted to Ivy League colleges with resumes that project the character of their accomplishments far beyond their formal credentials. During exit interviews graduates typically say these kinds of things about their experience at BIG:

- I can push myself to figure out one thing that's part of a larger web of many other questions, then find an answer to that.
- I know now that failure still leads to success.

- I drive my own learning and find what I'm passionate about so I can use it to learn what I need to.
- I can take failure now as an opportunity to grow.

The *Guidebook* explicitly reports that the students who get the most out of BIG:

- **Actively build their network.** They spend time in the BIG space, they build trusting relationships with the teachers and staff, they connect with their partners, and they engage in the BIG community.
- **Choose projects and work that interests them** and that they want to explore or learn more about.
- **Regularly reflect** on their project work, seminars, and life experiences, and how they add up to the credits they are learning and the resume they are building.
- **Connect how their work at BIG is benefiting them** at their mothership, their life outside school, and their future plans.
- **Stay open** to new possibilities, new opportunities, and new ideas.
- **Always ask for help sooner rather than later.** They recognize we are all here learning together. Learning is about moving from unknowing to knowing.
- **Communicate regularly** between meetings and makes sure their tasks and work is done well.
- **Address conflicts and disagreements proactively**- they work to convert the conflict into something valuable or powerful.
- **Explore what it means to be a leade**r - to lead your own life and to help make the lives of others better. Certain

> behaviors and mindsets will reduce your experience, your learning and the value you derive from your time at BIG.

Tangible Consequences

Dr. Pickering also reports that another third or so come to BIG wanting to escape the demands and boredom of conventional high school academic work (which BIG doesn't allow them to do), and find themselves having to cope with BIG's different, but consistently challenging, approach to learning and personal development. Many end up struggling because they're looking for 'the easy way out' and are trying to avoid both challenges. The least successful students frequently demonstrate these unacceptable behaviors:

> Avoidance
>
> Failure to make BIG a priority
>
> Failure to communicate
>
> Act and dress inappropriately
>
> Leaving our space a mess

Doing so results in being put on an improvement plan, a requirement to attend BIG daily, a parent meeting, and/or removal from the program.

Finally, the final third of BIG's students holds both optimistic and problematic orientations, with many eventually capitalizing on the opportunity to grow inwardly that BIG offers them.

BIG's 'Agile' Learning Principles

The BIG *Guidebook* describes 'Agile' as:

> … a term used to describe a mindset of constant learning and adaptation. Agile is used by a growing number of

companies and has proven to be more effective and efficient than previous team productivity and project management tools and approaches. First and foremost, the Agile **mindset** is a way of thinking about people, work, and how we approach doing complex work as a team.

The Modern Agile mindset we've chosen to follow has 4 basic principles:

Make People Awesome

Make Safety a Prerequisite

Learn & Experiment Rapidly

Deliver Value Continuously

Agile isn't something you do, it's something you are.

Like OBE, the learning system at BIG is Principle-driven!

Make People Awesome

At BIG we ask how we can make people in our ecosystem awesome – ourselves, our peers and classmates, our project partners, our teachers, our community. We make people awesome by learning about them, their context and pain points, what holds them back and what they aspire to achieve. We then ask ourselves - how can I contribute to making that person (or myself) more awesome?

Make Safety a Prerequisite

Safety is both a basic human need and a key to unlocking high performance. At BIG, this means ensuring everyone

feels safe. By safe, we mean we all work together to protect people's time, information, reputation, money, health and relationships. Everyone at BIG should feel safe to be themselves, express themselves and be an important part of the fabric of BIG.

Learn & Experiment Rapidly

You can't make people awesome or make safety a prerequisite if you aren't learning. First and foremost, BIG is about helping you to learn rapidly and deeply, especially about things you care about and want to learn. We learn rapidly by experimenting frequently. We make our experiments "safe to fail" so we are not afraid to conduct more experiments. When we get stuck or aren't learning enough, we take it as a sign that we need to learn more by running more experiments. The goal isn't to be "done" with learning - it's to constantly move forward and become a more fluent, articulate, and aggressive learner.

Deliver Value Continuously

Anything that isn't delivered isn't helping anyone become more awesome or safe. At BIG we ask ourselves, "How could valuable work be delivered faster?" Delivering value continuously requires us to divide larger amounts of value into smaller pieces that may be delivered safely now rather than later. Value at BIG could mean delivering on a promise made to a partner, doing your part for your team, and putting forth your best effort constantly in order to learn and improve.

BIG's Core Agile Strategies

Consistent work and continuous learning result from applying these four principles to the six Agile operational strategies noted below, regardless of the kind of project a work team chooses to undertake.

- **Focus on Value.** The team frequently vets assumptions about their project and work with community partners/ stakeholders to ensure they are working on things with the highest value. The team commits to small sequential deliverables to ensure they never veer too far off the path.
- **Empowered Teams.** An Agile team is self-empowered, self-organized, has a sense of identity, and is cross functional (meaning all team members can assume all the roles and work of the team).
- **Steady Flow.** Work is done in **small batches**. Backlogs of work must be maintained and prioritized, and team members address tasks when they are ready for them, moving on to the next when they fully complete their current task. Keeping a steady flow requires a high-level of team communication and discipline.
- **Empirical Process Control.** Decisions about how work is to be done is influenced by frequent inspection and adaptation. Work must be **transparent** - visible to everyone involved. Work must be **inspectable** – where problems or errors can be observed quickly and early. Work must be **adaptable** - if problems and errors are detected, the process should adjust quickly to compensate.
- **Maintaining High Quality.** When demonstrating to the partner/stakeholder for feedback, it should be in a **releasable state** – that is, the partner can do something with it. It provides value, meets the team's definition of done, and does what the partner/stakeholder expects.

- **Continuous Improvement.** There is a constant focus on improving the product/Project AND the process and work of the team. Feedback is essential to this work.

An Exemplary, EMpowering Example

Iowa BIG is such a departure from what we traditionally think of as "school" that it often takes a cogent example one of its team projects to understand how all of these elements come together. This is one of many similar examples of how BIG kids learn in a BIG way.

Kyle Kazimour came to BIG as a half-day junior student. He had been a middling performer academically in his home high school and most closely identified himself as a "band kid." Kyle expressed an interest in video and photography and initially joined a project team that was designing an All-Terrain Vehicle bridge over a creek at a nature preserve.

Once on site, Kyle began talking to the two elderly owners of the 77 acres that contained their project site. They told him about the permanent trust they had created for the acreage which ensured that their land would never be developed or 'improved no matter who owned it. This despite already being surrounded by suburban sprawl. Their story intrigued Kyle, and he asked one of his Iowa BIG teachers, Shawn Cornally, if he could start a documentary film project focused on their situation. BIG teachers always say 'Yes' to students wanting to initiate or explore a project.

Kyle pitched his project to other students and five others joined his team. One of them, Ethan Dix, was a sophomore who wanted to become a professional musician and songwriter. The others were interested in writing, filming, editing, staging, etc. Kyle and his team began working on their documentary and spent countless hours interviewing the couple and walking the 77 acres to truly

understand why the couple was so intent on preserving the land and the 'statement' that their intention was making.

The team wrote interview questions, drafted scripts, planned out the video shots they needed and developed the storyline. Ethan, meanwhile, was crafting an original music score that would support and help move the story to its conclusion. They shot countless hours of video, from flying drones over the property to interviews of the couple sharing their story. In addition, they engaged the Burr Oak Trust, the group who facilitated the development of the permanent trust, and also included them in their film.

In May of that school year, Kyle and his team named their documentary, "Somewhere Only We Know," and turned their attention to marketing it. With just a few weeks before its scheduled showing, they learned that the gentleman whose story they were telling was in hospice and nearing death. Armed with a not-quite-finished documentary, they went to the man's bedside and showed him their work. He died shortly before Kyle and his team held their "world premiere" – at the Cedar Rapids Public Library where 200 people showed up to view their 46-minute production. Among the attendees was the woman who owned the land and had just lost her husband.

Unbeknownst to the BIG staff, Kyle submitted his documentary to the Toronto Alt Film Festival in the adult category. . . and won! Now they proudly display the film's promotional poster at one of BIG's sites as an example of its powerful outcomes, its mission to "unleash human potential" and its impact on the lives of Kyle, Ethan, and everyone on his team. And, it's easy to see how each of Iowa's Universal Constructs were learned and applied throughout their project as noted earlier in the chapter.

Complex Communication

Productivity and Accountability

Critical Thinking

Creativity

Collaboration

Flexibility and Adaptability

It is also easy to recognize the history, sociology, English, political science, science, and music standards these young people were learning and applied in this endeavor – IN CONTEXT, for an authentic audience, and for something bigger than themselves or a grade on a transcript. That, to us, is the EMpowering purpose of education.

A Superb External Validation of BIG

At the very time that this chapter was being written, Iowa BIG was being visited by an evaluation team from a large organization seeking to highlight genuinely empowering, innovative schools. Its team members had all started innovative schools and had been doing site visit assessments like this for several years. They began their feedback session to the BIG staff with comments like:

- *We are all ready to move to Iowa and work at Iowa BIG!*
- *We were blown away by what we saw and experienced. Virtually every school we visit say they give kids agency and choice and that they are project based – and almost none of them are doing much of either. In most places these ideas are aspirational. That is not true here - you are actually doing it. This is one of the most amazing examples of transformed schools that we've seen.*

- *Our minds are blown.*
- *It is hard for us to put all of this into words – the only thing that might capture our impressions are, I think we just found a meadow full of unicorns!*

Near the end of the debrief, one of the team members who, rightfully so, had projected a demeanor of skepticism when he arrived, stated:

> *I've visited and assessed close to 500 schools over the past decade or so. Of all those schools there have only been 2 that left an indelible mark on me and which I'm in awe of and fully inspired by. That would be High Tech High in 2007 and Iowa BIG today. Congratulations. What you and your community have created here is truly amazing.*

I can only add to his Congratulations!

CHAPTER 11

Projecting OBE's EMpowering Future

The evolutionary picture of OBE's development portrayed in Chapter 9's Teeter-Totter diagram, plus Iowa BIG's embodiment of that evolutionary progress, clearly indicate that:

> The future of OBE as a vehicle for educational trans-mutation is going to be learner-driven, not system-controlled.

For me this indicates that the Paradigm, Purposes, Premises, and Principles that have defined OBE these past five decades are themselves going to evolve. In what way? A way that is clearly within and beyond the elements that define the far-right edge of the Teeter-Totter; EMpowerment in its most advanced forms.

The original OBE 'basics' were developed to pull education out of its ***Educentric*** CBO Syndrome – one in which the Calendar, the Curriculum, the Classroom context, and the Credentialing system created an impenetrable constellation of constraining factors that fostered a narrow, passive, micro, Content-Based view of learning. But the multiple Paradigm shifts described throughout this book have awakened a new reality of the:

Self-directed

Self-motivated

Self-engaged

Self-monitoring

Self-assessing
Self-affirming
Self-evolving learners

These Self-referenced attributes define **OBE's 21st Century learner!**

In the face of this MEGA Shift, which is bolstered by the rapidly expanding understanding of humanity's vast, overlooked potentials and capacities, OBE has but one pathway for remaining relevant in the coming decades: CONTINUE EVOLVING – even **beyond Transmutation** as I've described it here so far. For me that means getting on human evolution's cutting edge and using its genuinely revolutionary research findings and possibilities to project how OBE might unfold. Where is that cutting edge?

Using Maslow's Hierarchy as a Guide

Fortunately, like most academics, I had been given a valuable resource for understanding and describing humanity's evolutionary/developmental path in the work of the eminent psychologist Abraham Maslow. Back in the 1950s, Maslow published a theoretical model of human 'needs' and evolution that's widely known as **"Maslow's Hierarchy."** Since I had been familiar with it since graduate school, I wasn't entirely mystified by what I encountered on my own evolutionary journey through life, and I found it invaluable at the beginning in three key ways.

First, there was a clear parallel between the psychological states/needs/paradigms in Maslow's framework and the **evolutionary levels** of development and consciousness portrayed in several of the other major frameworks of human capacity and potential that I encountered in my explorations.

Second, the top level of his Hierarchy is famously known as **Self-Actualization (SA)**, and SA seemed to be the key link to what I

was discovering left and right as the fruition point in this other human capacity work. In Maslow's hierarchy people must evolve beyond their **lower ego needs** to reach a place where they can accept and embrace themselves and their lives without further striving. In short, the SA level was reached when people 'needed' nothing more than the life they were living and found great fulfillment in it.

Third, I had always seen his hierarchy portrayed as a pyramid, with Self-Actualization at its pointed apex. Using that convention, please study my presentation of his ideas in this first pyramid diagram, noting that **some of my words vary from, and imply more, than his**.

Maslow's Evolution Modified

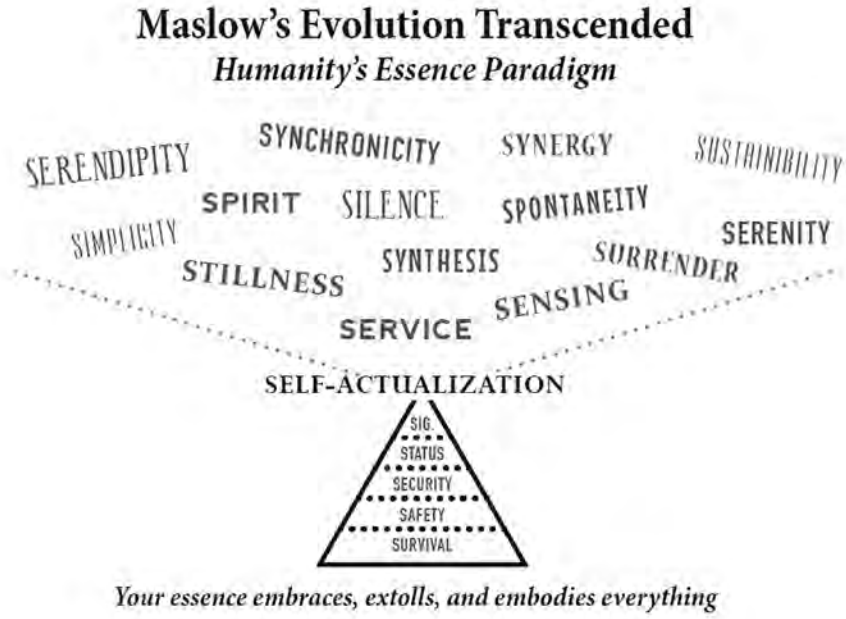
Humanity's Separation Paradigm

The Separate Self Struggles, Sacrifices, and Strives for Significance

Given what this pyramid figure contains and implies, I soon realized that a different familiar metaphor could better explain how all of this seems to work. So, imagine that the pyramid is actually a cone-

shaped volcano that forces the turmoil and pressures of Ego striving higher and tighter toward the small, narrow fissure at the top.

Once the striving and struggle abate and **Self-acceptance** sets in, Maslow's expansive state of Self-Actualization ensues. But what happens when the volcano erupts, and all that pressure and chaos are released?



Take a close look at the second diagram and let its message and awakened state of **Serenity, Serendipity** and **Synchronicity** settle in. Beyond the volcano's **Ego-Fueled Struggles** lies a vast higher dimension of human awareness and existence portrayed in the diagram as a swirling sea of **'S'** words exposing a new, unexpected 'reality'.

When Ego Needs Fall Away

Through this metaphor I came to realize that this acceptance of 'who I am and what is' was the critical condition that enabled Self-

Actualized people to transcend what many call the ego's 'insecurity needs'. This state of acceptance and attunement with 'what is' and nothing more is very similar to the sublime state that great gurus and avatars have often described. Happily, I finally came to realize that Self-Actualization is actually the gateway to a **vastly more expansive domain of experience and universal inter-connectedness** that lies beyond it. The work that I was exploring offered a variety of powerful ways to get people into and through that SA gateway, and the common description of his hierarchy helped me develop this metaphor that helps explain it.

Furthermore, in my personal inner journey, I discovered that once you break through the Ego's striving, needs, and self-induced limitations:

> There are no limits to how vast your awareness, consciousness, perception, and potentiality can become, or what they can reveal. You literally experience a more expansive dimension of existence – a new Zero in which you can discover and create a new universe of paradigm potentials and realities and embody a more expansive consciousness identity!

What lies behind this remarkable revelation? My inner journey gave me a clue.

OBE Evolves within Our Quantum Universe

Thanks initially to my exposure to many spiritual teachers and writings during my journey, my awareness-expanding experiences led me to realize that 'consciousness' or 'deep awareness' is actually **an energetic field that contains the whole of our universe**. Said differently:

Everything that exists in any form or perceived dimension is Consciousness!

This is why many of those 'teachers', and **most quantum physicists**, embrace a view of the **total unity and interconnectedness** – i.e., **'Oneness' – of all that exists**, including all life on this planet. From this **quantum perspective**, all things are **inseparable aspects of this one unified field**, and that is contemporary science's ever-evolving cutting edge. But from our Newtonian perspective of three-dimensional existence, (as I mentioned in the middle of Chapter 1) we are accustomed to perceiving things as being different and distinct from each other – separate and unrelated particles of existence. This is like understanding light as being **only** a mass of particles, rather than a coherent wave as well.

Moving beyond the 'particle' Paradigm

This, then, leaves all of us with a life-defining decision:

> On which universe – the tangible Newtonian one that we're used to, or the energetic Quantum one that seems to defy logic – do we base our paradigm of reality?

Are we individual particles, or inseparable aspects of a field? Our decision/perception will determine how we live, learn, and educate, and whether we remain grounded in finite, linear ***educentrism*** or choose to experience our unbounded, latent, ***transcendent*** potentials.

Although the several direct experiences I've had of, and within, this limitless 'Quantum Field of Oneness' defy description, I have done my best here to put its incomprehensible essence into words – knowing that words, by their nature, can neither convey the essence of the field nor what one experiences about it. Nonetheless, in late March 2019 I was intuitively led to sit in silence and allow my 'spirit partners' to share information with me about this Universal Consciousness, what it is, and how it expresses itself in humans. With tiny tweaks, the following ten statements, which I regard as Premises, are exactly what came to me that day.

Ten 'Quantum' Premises

While these statements may seem 'far out' and 'esoteric', they evolved from the resonance between my logical mind and deeper intuition, and their focused understanding of the growing body of research from Quantum physicists and neuro biologists. So please take the time to let these ten Premises resonate with you and, perhaps, awaken you to your own vast Quantum potential as they did for me.

1. Our universe is a living energetic field of Universal Consciousness containing all knowledge, possibilities and potentials that exist across all time and space;
2. These energies manifest in frequencies and coherent patterns perceived as 'realities' (fields of possibility) by those attuned to them. In humans the patterns manifest as thoughts, feelings, perceptions, words and actions that coalesce as 'Paradigms';
3. These energetic patterns form an evolving continuum of Conscious existence that runs from low-vibration 'material densities' (Corporeal and Cognitive) to higher vibration (Connection and Choice), to very high vibration 'spirit' (Cosmological);
4. When these patterns coalesce coherently, they are called 'dimensions', 'memes','evolutionary stages', or 'states of consciousness';
5. As human consciousness expands, so do its three inherent components:
    a. Cognizance of what exists, including possibilities and choices
    b. Connection to what exists and its source
    c. Capacities for thought, feeling, communicating, and acting

6. The more coherent and balanced a person's vibrational state of consciousness, the greater is their capacity to perceive and attune to the field's specific frequencies, dimensions, potential, and power, and to resonate harmoniously with everything in it and its creative source;
7. The evolution of human civilization mirrors its capacity to connect with, access, and utilize the knowledge and possibilities within the vaster dimensions of this continuum;
8. Within this field, possibilities are perceived as pathways of opportunity, and potential is each pathway's energetic essence;
9. The processes of transmuting energy from its potential state into manifested forms are called Living, Learning and Leading. Choice is their catalyst; and
10. Therefore, how we Live, Learn, and Lead are the result of which possibilities we perceive and choose to manifest, moment by moment – processes known as 'Creating Your Reality', and 'Living in the Moment'.

Although these Premises depart radically from what we've been socialized into believing about just about everything, including our own innate potential, they are consistent with a great deal of cutting-edge research on the energetic nature of our brains and bodies. Consequently, they've led me to conclude that there's something deeply fundamental about what 'educating' human beings and fully fostering their inherent abilities means. What most 'advanced' societies have been ignoring for thousands of years is educating humans about their connection to this Quantum Field of Oneness. Unless humanity wishes to stay mired in the comfortable but archaic Paradigms of the past, it's high time for education to foster this connection.

Why? Because its potential extends far beyond 'modern' learning systems, Theoretical OBE, Tangible OBE, and even Transmutational OBE, this missing connection calls for a new Paradigm of learning and living.

I call it ***'Oneness-Based Embodiment' (OBE).*** This new Paradigm:

> Expands **what and how we come to 'know'** beyond the assumptions and structures of the cognitive learning models of the past, by inviting us to activate our intuition as we open to, understand, acknowledge, and embody our connectionand relationship to the ever-evolving **Quantum Field of Oneness**.

Although it may materialize far in the future, this ***transcendent*** Paradigm will be an inevitable feature of humanity's evolution, whether it's called **'Transcendent OBE'** or not.

CHAPTER 12

Capturing the Essence of 'Oneness-Based Embodiment'

Defining **'Oneness-Based Embodiment'** as a Paradigm of education is more challenging than just substituting the words 'logical' and 'fixed' with the words 'intuitive' and 'flexible' respectively. Although they might at first appear to be polar opposites, ***educentrism*** and this new 'OBE' are **not** opposites. Why? Because **Oneness** implies that **all things exist as interrelated and inseparable elements in a unified whole.** Since some energy or force holds everything in our universe in that common embrace – even things regarded as opposites from our three-dimensional perspective – ***educentrism*** is contained within this inclusive embrace. Hence, it is just one of an infinite number of possible paradigms contained within the Oneness Paradigm of Unified Existence and how it is experienced.

However, those who resonate with the ten foregoing Premises and seek to experience Oneness in and through a personally empowered and elevating Paradigm of education do hold a decidedly different view of existence, life, and learning than is supported by our conventional culture and education system. The Oneness Paradigm clearly reflects and embodies different assumptions and understandings about the essence of human existence, learning, potential, capacity, and purpose than our modern cultures recognize. These understandings clearly transcend ***educentrism's*** fixed and limited thinking and features, and even those of Transmutational OBE and offer humanity a more comprehensive, expansive, and personally empowering conception of learning, living, and existence itself.

This can be illustrated by comparing what **Oneness Based Embodiment** represents and seeks to implement (on the right) with education's prevailing priorities and practices on the left. While this list is not exhaustive, these examples illustrate the inclusive, expansive, and evolutionary nature of Oneness Based Embodiment and what it invites us to embrace.

ONENESS BASED EMBODIMENT

Acknowledges	**while**	**Emphasizing**
Knowing through Thought		Knowing through Open Perception
Pursuing Curriculum Priorities		Inviting Inner Attunement
Memorizing Prescribed Content		Exploring Greater Possibilities
Completing Assignments		Creating What You Love
Believing Accepted Knowledge		Opening to Emerging Insights
Rational Analysis		Attuning to Inner Experience
Competing for Rewards		Collaborating for Mutual Benefit
Conforming with Academic Norms		Awakening to Inner Wisdom
Critical Thinking		Promoting Intuition and Receptivity
Finding Right Answers		Asking Deeper Questions
Instructing		Evoking
Achieving Defined Goals		Cultivating Individual Talents
Avoiding Religious Issues		Acknowledging One's Spiritual Essence
Focusing on Competence		Embracing Compassion
Developing Cognitive Skills		Fostering Expanded Perception
Judging Weaknesses		Highlighting Strengths

Promoting Loyalty	Cultivating Acceptance
Requiring Compliance	Encouraging Exploration
Stressing Differences	Emphasizing Commonalities
Extolling Technological Skill	Honoring Beauty and Nature

The foregoing comparisons are not an invitation to abandon content, thought, and structure in education but to use them in profoundly more expansive, intuitive, and imaginative ways – ways that both honor individual talents and contributions and that promote harmony among all living things and with the planet itself. To function in life, people need appropriate knowledge, orientations and skills. To function in Oneness, people live with a deep and direct awareness and sensing of their unique and inseparable connection to all things – both animate and inert, both macro and micro, both 'positive' and 'negative'. This elevates what is learned cognitively, what is performed tangibly, and what is felt experientially. All three kinds of learning are essential, but become shaped and manifested in the light, context, and essence of Oneness.

Oneness Based Embodiment's Intended Outcomes

Given all of the foregoing and its message about the ultimate unity of all things, is it fair to ask what this new OBE's intended Outcomes might be for learners on our current plane of existence? Yes, from the following frame of reference, it is.

First, however, let's acknowledge that this potential paradigm of education is not only about **knowing** in the conventional sense, which is the focus of Theoretical OBE, and not only about **doing** in the way that both performance learning and Transmutational OBE have been understood and applied. It is also about an **inner state** and **quality of being and perceiving** that does not carry any specific behavioral expectation or manifestation – the state expressed in the second Maslow diagram above.

At its core this is a personally referenced, inner state of awareness that is grounded much more in 'knowing' through one's capacity to **sense**, **feel,** and **allow** than to cognitively **think**. Although this may seem unfamiliar or odd, view it primarily as **Intuitive Perceiving** rather than as **Intellectual Processing**, which, according to those with extensive experience with these processes, requires a quieting/calming/'emptying' of the active mind.

Second, experience shows that the more quieting/calming/'emptying' of the active mind one achieves through mindful meditation, deep 'surrender' to stillness, and intuitive experiencing, the more one's psychological and emotional state of being changes. Intuition becomes more acute and perceptive; awareness shifts and expands; senses sharpen and become more 'alive'; and perspectives change. As feelings of inner calm replace the tensions, stresses, judgmental thoughts, limiting beliefs, and urgencies of modern life, these calming inner feelings generally enable people to awaken to, trust, allow, consider, and accept different possibilities than before. This, in turn, opens new avenues of decision-making and action for them.

Applying the familiar 'Five C's Framework'

Third, this all comes together from my perspective when I put it in the context of the 'Five C's' framework that has guided the Outcomes development work at St. Paul's Catholic in both higher and basic education (Chapter 7) and similar development on four continents for the past three decades. When I first arrayed the five 'C' words in the now-familiar two-dimensional format shown below,

Creativity

Compassion Consciousness Collaboration

Competence

I noticed almost immediately that they posed two intriguing possibilities. First, maybe the energetic essence of Consciousness (in the middle) strongly influenced how Creativity, Collaboration, Competence, and Compassion were all 'demonstrated' and expressed. Or, stated differently, perhaps the latter four were simply tangible expressions of Consciousness itself.

Either way, what would we expect the Outcomes of these respective domains of living to be if we embraced the Oneness Based Embodiment Paradigm? Well, based on all the foregoing, consider the following as very likely possibilities.

Enhanced: Consciousness, psychological serenity, mental clarity and focus, joy, perception of all kinds, awareness, intuition, attuned senses, emotional calm, love of all that exists, acceptance of differences, purpose/motivation, clarity, authenticity, integrity, and decision making.

Enhanced: Creativity, innovation, imaginative designs, future-focused problem solving, entrepreneurship, initiative, risk-taking, resourcefulness, aesthetics, and receptivity to change.

Enhanced: Collaboration, teamwork, cooperation, communication, friendships, relationships, trustworthiness, shared responsibility, interdependence, equity, equality, community building, reciprocity, acceptance of others, and mutual respect.

Enhanced: Competence, quality, reliability, conscientious endeavor, expertise, productivity, performance, implementation, mentoring, and individual responsibility.

Enhanced: Compassion, caring, dedication, selfless contribution, guardianship, persistence, service, stewardship, acceptance, support systems, peace, and social interventions/improvements.

There's more to each constellation of possibilities, of course, but each of these in its current form represents a constructive first step in enhancing the human condition and supporting humanity's evolution – both individually and as a whole.

So please keep both these Enhanced Outcomes of the Five C's framework and **Oneness-Based Embodiment** in mind wherever and whenever you encounter the letters **'OBE'**, and consider both their inherent and expanded potential to change the world through people who are deeply Conscious, Creative, Collaborative, Competent, and Compassionate. They embody the potential to Transform, Transmute, and Transcend today's conflicted world and brighten the evolutionary pathway to education's future. Who could ask for more?

EPILOGUE

Charting Your Course to Outcome-Based EMpowerment

If you've come this far in the book, I'm assuming that you're serious about how you, your educator colleagues, and your students can benefit from OBE's evolving power and potential to change and empower lives. I'm gratified by that and want to suggest several starting points, knowing that each of them will be essential to your success. It's just a matter of which you perceive will break open the ***educentric*** log jam most readily in your institution.

First, look at the many ways you can **Expand Opportunities** for your students to demonstrate real improvement in their learning by addressing and building on these three key Spadyisms:

> OPPORTUNITY ENDS WHEN YOU GET GRADED IN INK
>
> WHEN IN DOUBT, GRADE IN PENCIL
>
> WHEN YOU RUN OUT OF TIME, THEY RUN OUT OF OPPORTUNITY

All three ultimately involve grading and record-keeping, which are critical issues you will have to address if you are serious about validating and supporting LEARNING SUCCESS. I'll be saying more about the latter in a moment. **

Second, look at the many ways you can exercise **High Expectations** strategies. They too are imbedded in all of the issues surrounding

Expanded Opportunity, grading, and record-keeping. You'll find some insightful ways think about and address this back in Chapter 3, so don't hesitate to use those 'tips' and these Spadyisms as starting points:

'ESSENTIAL' MEANS ESSENTIAL!

THEY DON'T GIVE B- MERIT BADGES OR C+ KARATE BELTS

PILOTS ARE OUTCOME-BASED AND HAVE TO LAND SAFELY EVERY TIME

IF IT ISN'T GOOD, IT ISN'T DONE YET

Third, can take a step back and assess most of this book is devoted to explaining one key fact: **You can't be Outcome-Based without Outcomes that Matter**, and that takes us directly to three key diagrams: The Life-Performance Wheel (Chapter 6), The Demonstration Mountain (Chapter 7), and the OBE Teeter-Totter (Chapter 9). Put them together and they compel you to address OBE's **Clarity of Focus on Outcomes** Principle and to answer this key question: HOW BIG IS YOUR 'O'? Your answer will surely be affected by these five Spadyisms:

OUTCOMES HAPPEN AFTER 'DURING' IS OVER

THE BIGGER THE OUTCOME, THE MORE TIME THEY'LL NEED

OUTCOMES OF SIGNIFICANCE 'LAST'

OUTCOMES MATTER AFTER THEY'RE GONE

OUTCOMES TAKE MANY FORMS

And your answer will also determine from where you activate OBE's **Design Down** Principle and how macro, future-focused, trans-disciplinary, and personally empowering your approach to curriculum design is going to be.**

While this third starting point seems both fundamental and daunting, there's one more that may actually be what I consider to be **'The Tail that Wags Education's Dog'**,

Going back to Day 1

My pathway to OBE began in the 1967 Paradigm shifting conversation with my friend Jim Block that I described at the beginning of Chapter 2. Jim enthusiastically explained to me the philosophy and elements of Benjamin Bloom's Mastery Learning model. My response went something like this: "This will never work because **the certification system of schools drives the instructional system**, and it's Time-Based. Learning opportunity ends on fixed calendar dates because that's when students get graded in ink." My skepticism didn't last.

You've now read in Chapter 8 how I now confront many of those 'certification system' and 'numbers game' issues head on, but I left one critical matter unaddressed: **Students' Transcripts** – which document their learning and serve as their passport to the future. Yes, OBE can work its wonders, and assessments can accurately document student learning, but if transcripts don't accurately contain and reflect that information then the purpose and alignment of the entire OBE Paradigm will be undermined. Consequently, I want to briefly address that missing component and suggest that it represents a vital fourth starting point for charting your course to Outcome-Based EMpowerment.

Transforming Student Transcripts

Of the many Spadyisms listed in the Introduction to this book, several of them very directly relate to record-keeping, including the ones shown just now. But my favorite is this one:

> If they give you this much space
>
> . . . ❒⍰⍰⍰⍰⍰⍰
>
> to record a student's learning,
>
> They sure must not want to know much!

The tiny box describes the most prevalent kind of educational record-keeping, the **Permanent Record**, which keeps ***educentrism*** locked in place. Permanent Records are filled with **ink grades** – grades that fit into tiny boxes and are deemed permanent and unchangeable once issued, usually on specified calendar dates, **no matter how much you learn about the subject or improve the skill in question after the grade has been issued.** Now link all of this back to what we've read about education being **time-based** and help your colleagues see how it all ties together.**

Education is time-based in large part because **grades** are time-based. Grades are symbols of how well students do in a **given time block**, not how well they can eventually do with more experience on the very same learning. It follows then that **summative assessments** are time-based, and **record-keeping** is time-based, **CREDITS** are time-based, and they all fit into tiny time-based boxes. So unless Credits get **based** on something other than time, and unless **record-keeping** gets based on something other than time, and unless **assessments** get based on something other than time, and unless **grades** get based

on something other than time, and unless Outcomes are more than numbers in tiny boxes in **permanent records**, **education is going to remain terminally *educentric***. Here are a couple of significant alternatives to consider. **

The shift to 'criterion defined' Open Transcripts

Back in the late 1970s, Dr. John Chaplin, Superintendent of the Johnson City Central Schools in New York State, recognized that a different kind of record-keeping device had to be created; otherwise, Bloom's Mastery Learning model would never fulfill its promises of Expanded Opportunity and Success for All Learners. His idea, which was not at all novel in the 'real world' at that time, was what he called an **Open Transcript**. Very simply it meant that students' transcripts would be open to **continuous modification and upgrading** consistent with their growing skills and knowledge base as learners.

What had to change for this to happen, of course, was the transcript's frame of reference. Instead of it being days, weeks, and months, the reference point would have to become the categories and levels of content, concepts, and skills imbedded in the curriculum. Anytime a specified kind of learning improved, the change in status could be immediately recorded on the transcript, which was being **continuously updated**. Today's technologies make that a simple procedure.

Champlin's **Open Transcript** idea was immediately controversial because it violated all of the **traditional** norms and rules pertaining to time-based grading. Very simply, **changing any student grade was regarded** as **IMMORAL AND ILLEGAL** because the **ink grade** itself represented the student's time-based performance within the school's single-opportunity time-block performance norms. The grade is what the student did during the time-block – case closed. This practice led to a range of Spadyisms including:

> INK MEANS PERMANENT, AND PERMANENT MEANS ETERNAL

However, by Champlin's reasoning, it was IMMORAL AND ILLEGAL **NOT to change** a student's grade because **the original grade should be about learning and performance, which had now improved.** Hence, the **Open Transcript** compels educators to explicitly link grades to learning not time-blocks, honor OBE's Expanded Opportunity Principle, and grade in pencil (which can be changed), not in ink. This huge shift in orientation underlay OBE's fundamental Paradigm statement:

> WHAT and WHETHER students learn successfully is more important than WHEN and HOW they learn it.

And when do Open Transcript grades actually turn into ink? Graduation night!

The further shift to Performance Portfolios

Once OBE had a definition of Outcomes being tangible demonstrations (Chapter 4), and once its advocates realized that Outcomes took many forms, it opened the door to **tangible products** being regarded as Outcomes too. Then, of course, came the realization that conventional transcripts with tiny boxes had no way of documenting and portraying what such Outcomes were. After years of struggling with this dilemma, OBE advocates began to promote the idea of **Performance Portfolios**.

The portfolios in question were actual physical containers of various sizes and shapes into which tangible documentation and learning products could be **placed** and then **replaced** as **new** and **improved** ones were developed – pictures, sculptures, written papers, recordings, videos, woodwork and metalwork products, etc. Since students can be given responsibility for creating and maintaining them (as happens

at Iowa BIG), portfolios are a popular and paradigm-shifting way to further expand and legitimate the meaning of competence and 'demonstrations of learning'. Moreover, records can be kept on every kind of student knowledge, skill, and tangible accomplishment – not just paper transcripts with tiny boxes and grades in them.

Student-Led Conferencing pushed the limits

There is an element of **mistrust** built into all credentialing and accreditation systems. At their core they're asking the person or the institution to **'prove'** that they are competent and responsible enough to do the job they are asking to occupy, whether it's being licensed to **practice** a recognized profession, or being licensed to provide the **training** for that profession. In both cases, some **higher authority** apart from the party involved sets the standards that must be met and assesses and evaluates whether or not the candidate's performance meets or exceeds them. In other words, evaluation and credentialing authority and power lie **outside** the candidate and are inherently **not** EMpowering.

What came to be called **Student-Led Conferencing (SLC)** reversed that dynamic. The assessment and evaluation roles were played **by the student**, while the external parties, usually parents and the teacher, sat and listened as detailed reports about expectations, demonstrated Outcomes, recent improvements, and new leaning goals were presented to them. Traditional report cards were no longer needed as long as learning Outcomes were clearly identified. Remarkably, the student presenters were often age **six** or **seven**, and the conference they were directing was an expression of the **Self-Directed Learner** Outcome described throughout the book's latter chapters.

When students take charge of their own learning and assessment, as in Iowa BIG, conferences like this become commonplace as students

develop a command of their learning progress and how it unfolds. This remarkable shift in responsibilities and dynamics involving young children actually applies to students of all ages. In short, the experience and expertise gained with **Student-Led Conferencing** are invaluable when:

> High school graduates face the challenge of **'selling themselves'** in university admissions interviews, and
>
> University graduates have to sell themselves to prospective employers.

So as you chart your course to Outcome-Based EMpowerment, just imagine primary and secondary teachers routinely saying to their students:

> Since you're going to be interviewed for life-changing opportunities when you're older, let's start now and develop those skills. And, with your **Open Transcript** and **Performance Portfolio** as resources, I think you'll easily be able to convince adults of your considerable capabilities. So let's start now by demonstrating to your parents what you've actually accomplished.

And then imagine university professors saying something similar to their students. After all, people in the 'real world' and every area of professional pursuit are looking for:

> Self-directed, Self-motivated, Self-engaged, Self-monitoring, Self-assessing, Self-affirming, and Self-evolving life-long learners and colleagues.

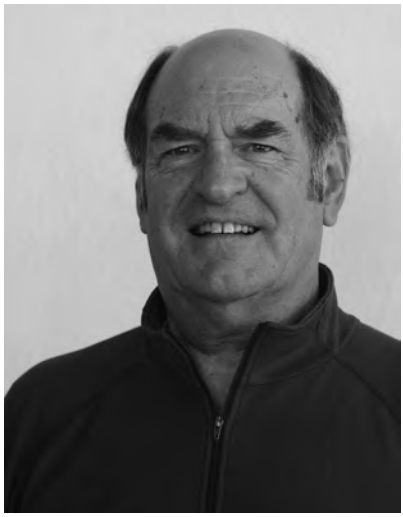
What better place to start than creating a documentation system that truly validates who they are and what they're prepared to contribute to the world.** Goodness knows, the world needs it.

** I am available to assist organizations that are sincere about pursuing the issues and strategies central to designing and implementing this component. This includes in-depth training seminars, either on-line or on site. Details are available in the Services section of my website: **williamspady.com**.

Please visit my website at
www.williamspady.com/OBEbook for more free information

AUTHOR PAGE

Dr. William Spady



Dr. William Spady is the internationally recognized authority on paradigm-shifting and personally empowering approaches to Transformational Outcome-Based Education (TOBE). 2018 marked his 50th year as the leading definer, advocate, teacher, and creative resource of this 'Success for All Learners' paradigm – work that has taken him to four continents and the Middle East. His paradigm-shifting, cutting-edge workshops, seminars, lectures, and hands-on design projects focus on expanding the vision, deepening the philosophical grounding, and improving the performance of learners, educators, leaders, and educational systems of all kinds.

Bill infuses his sociological background and expertise in all of his organizational change, transformational leadership development, and

strategic organizational design writings and work. And his decades of deep inner exploration enable him to transcend conventional views of human nature, growth, performance, and self-actualization; develop frameworks that embody, elevate, and inspire new visions of human learning and potential; and implement empowering models of deep learning and living.

To learn more about Dr. Spady, go to www.WilliamSpady.com

Please visit my website at
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information.

Here's what Experts say about this book:

"This is a genuinely awesome book! It carries a coherent message of transformation, hope, and empowerment to parents, educators, and leaders across the world by dramatically expanding our beliefs about learners, learning, and how best to educate. Dr. Spady shows how we can implement the authentic, empowering essence of OBE more insightfully and powerfully than most people have ever imagined because it's 'common sense' that's been buried under mountains of 19th Century cultural beliefs, capabilities, and practices. That alone should inspire everyone who cares about educating today's children for a viable, empowering future to examine every chapter of this remarkably illuminating book."

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Desmond Collier, Owner-Director, Collier's Corp. Com., South Africa

Dr. William Spady

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