

Draft Report

U.S. Education Delegation to Alberta, Canada January 13-16, 2014

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Table of Contents

Our Purpose

Pages 1-2

Why Alberta?	Pages 2-3
Lessons Learned	Pages 3-8
 Getting Accountability Right (at least not wrong) Cultivating "Systemness" Relentless High Expectations/Clear Vision Investment in Early Child Development Mastering the Basics from Inception and the Significance of Teachers Tri-Level Reform Equity 	
Conclusion and Key Challenges	Page 8
The Delegation	Page 9
Study Tour Agenda	Pages 10-13

Our Purpose

The National Public Education Support Fund (NPESF) organized a U.S. delegation of 46 education leaders on a study tour of Alberta, Canada as part of its continuing series of international visits to top-performing educational systems. Our purpose was to explore how aspects of the system change process in Alberta could inform U.S. policy and state strategies to accelerate educational progress and attainment in the American context. The U.S. delegation included national and state policy makers, educators, thought leaders, and members of the Education Funder Strategy Group (ESFG), a peer learning community of leading foundations focused on education policy. Our special thanks to the Hewlett Foundation, NEA Foundation, Nellie Mae Education Foundation, Rodel Foundation of Delaware, and Stuart Foundation for their help and support in enlisting a diverse delegation of state and national leaders to participate in the learning journey.

Under the guidance of the College of Alberta School Superintendents (CASS), the delegation examined the policies and practices that continue to drive Alberta's high-performing education system and its new provincial strategy to prepare all students as "engaged thinkers, ethical citizens with an entrepreneurial spirit" for today's rapidly changing world. The delegation would like to recognize the ministry officials, education leaders, and other dignitaries who shared their insight and expertise with the group.

Our goals were to:

- Understand how Alberta has become a top performing education system and examine the drivers deployed to transform a complex system.
- Gain insight into how the public school system continues to adapt and innovate in order to meet the challenges of preparing students in a world characterized by dramatic technological and economic change.
- Consider how insights from the Alberta experience may contribute to current challenges
 of implementing changes such as the college and career readiness standards, new
 assessments, and 21st century learning.
- Learn how Alberta is progressing in the development of its province-wide approach to early childhood development and education.

Before arriving in Alberta, the delegation reviewed background materials on Alberta's reform efforts, including the Government of Alberta's discussion paper and foundational pillar, *Inspiring Action in Education*. This document laid out a discussion framework for the vision, values, principles, and policy central to school transformation within the province. Researcher, author, and worldwide authority on educational reform and systems change, Michael Fullan of Michael Fullan Enterprises, served as the trip's intellectual guide and cultural interpreter. Joanne Quinn, Senior Associate, Michael Fullan Enterprises, served as a co-designer and moderator for the trip. Paulette Hanna, Director of Education, College of Alberta School Superintendents, served as the trip's local facilitator.

This report reviews and summarizes a number of the key takeaways and lessons learned from Alberta, Canada. Upon reflecting on the abundant insights gained from the trip, we hope delegates will cultivate further discussions about the lessons and follow-up actions from Alberta that can help inform and deepen their work in the U.S.

Why Alberta?

Background Information

Canada's population of slightly less than 35 million people places it at about one tenth the size of the United States. Due to a thriving economy centered on oil, natural gas, forestry, agriculture, and other resources, the province of Alberta has seen one of the highest population growth rates in Canada throughout the last decade.

When measured by population, Alberta is the fourth largest province in Canada with slightly greater than four million citizens, and is the fastest growing province. Its population compares closely with that of the state of Kentucky. Two of Canada's five largest cities, Calgary and Edmonton, are located in Alberta, giving the province a diverse population of city dwellers, suburbanites, and those living in rural areas. These cities also both report having minority populations of over 30 per cent.

Over the last four years, officials have taken steps to help make Alberta a leader in education around the world through a series of reform measures involving the collaboration of various stakeholder groups. Students from Alberta have produced commendable results on the Programme for Student Assessments (PISA). In 2012, students in Alberta placed sixth in reading, seventh in science, and 15th in mathematics worldwide compared with participating nations.

Like other Canadian provinces, the Alberta Legislature has almost sole authority to create and enforce laws respecting education. As was the case with the province of Ontario, Alberta's strong provincial control in implementing reforms to its educational system enables it to serve as a model for which individual U.S. states can acquire ideas in order to determine reform strategies and future policies.

Vision for 21st Century Learning: "An Educated Albertan is one who is an Engaged Thinker and Ethical Citizen with an Entrepreneurial Spirit."

With a persistent increase in industry and trade, Alberta's demographic climate has continued to change. This, among other variables, has led to increased diversity within the education system and a shifting workforce throughout the province. In 2009, Alberta's Ministry of Education, Alberta Education, and the provincial education minister at the time, Dave Hancock, set out to create a series of reform initiatives by engaging all Albertans to help in painting a picture of what the people of Alberta would require of education 20 years out in order to prosper. To begin the policy discussion, citizens were asked the following question: what will it mean to be an educated Albertan in the year 2030? From the early planning stages, a strong emphasis was placed on all stakeholders, including government officials, educators, health

professionals, union leaders, philanthropy, business leaders, parents, and everyday citizens, coming together in a collaborative effort in order to implement true change in Alberta's education system.

"What is noteworthy in Alberta is that they have gone deep into communities to ask their perspective about what the education system of the future should be."

-Raul Gonzalez, the Bill & Melinda Gates Foundation

One distinctive trait of Alberta's ongoing reform efforts is the emphasis that the government puts on including stakeholders in both the decision making and implementation process. Public education is seen as a public good instead of simply a private gain. There is agreement that a shared vision should include a high degree of consensus in order to ensure a high degree of continuous buy-in. Within this shared vision, a common message was created to increase continued commitment. The province used community input to center reform around a shared vision to drive change, which included *the three E's*. A cohesive message around **engaged thinkers, ethical citizens, and entrepreneurial spirit** continued to be developed. Alberta Education printed the thoughts and ideas of Albertans in a report entitled, *Inspiring Education*, with a follow-up report, *Inspiring Action*, which outlined a collective message about exactly what must be done in order to make the cohesive dream in *Inspiring Education* a reality.

In order to encourage sustained involvement in constructing and employing successful reforms, a shared sense of what was at stake was created amongst all stakeholders through the forming of broad coalitions. Moreover, Alberta's teaching force has played an integral part in the reform process as they have remained heavily involved.

Lessons Learned: Driver's For Alberta's Educational Success

Alberta is a unique model for exploring "what works" when it comes to systems change. It is also an example of how the creation and implementation of consistent policy modifications and certain key drivers are necessary for successful reform. The province is still in the primary implementation and execution stages of their reform efforts. Amongst other factors, essential elements of successful systems change includes approaching accountability correctly, providing continual investment in common capacity building, and constructing a system to continually strike a balance between local autonomy and centralization.

Getting Accountability Right (at least not wrong)

Formative assessments and the collection of appropriate data are important elements of effective systems change. It's what educational leaders do with data that determines the effectiveness of reform. If data is being used for the "wrong" reasons, it is a necessity for decision makers to create a positive culture around all data outcomes. Alberta's educational successes can be partially attributed to a shift of using outcomes to provide educators with focused intervention supports that are centered around collaborative inquiry rather than for simply pinpointing blame. History has shown that when negative consequences are used as the dominant method to remedy poor performance on measures of accountability overall accuracy and effectiveness are compromised for a myriad of reasons.

Regardless of the precise data measure, there is a growing consensus that education leaders in the U.S. generally spend too much time on the analysis of student data, but not nearly enough time focusing on the accuracy of the data or how to most effectively use it. This is not to say that the use of student testing as a major tool for measuring outcomes should not exist when reforming a system. Data should be used to promote positive change in order to ensure the long-term success of reforms.

With any systems of accountability, the pedagogy that leads to the implementation of set standards for learning must be understood before outcomes can be measured with accuracy. Recently, Alberta implemented student-friendly assessments to replace the existing Provincial Achievement Tests. Structurally, these new assessments use multiple indicator measures and encourage the use of higher order thinking skills. To assist both teachers and students, new assessments for learning encourage the teaching of questioning skills, self-assessment, metacognition, efficacy, confidence, and engagement. Furthermore, truly effective assessments for learning involve a continuous exchange of information between students and teachers regarding individual and collective progress toward mastering desired learning outcomes.

The new Student Learning Assessments will shift the focus of the measurement of student progress to literacy, numeracy, and cross-curricular competences. As a result, they will be designed in a way to truly support educators and parents in understanding the degree to which students demonstrate competencies such as creativity, critical thinking, and problem-solving. New accountability measures will encourage transparency with the issuance of individual school and district report cards. Accountability measures in Alberta will be based on the redesigned provincial curriculum. This new curriculum is being developed with a heavy emphasis on educator collaboration. It will be learner-centered, digitally based, and provide for local autonomy.

Cultivating "Systemness"

The Alberta case demonstrates the importance of designing systems that foster partnerships and encourage continuous improvement. To effectively outline this, stakeholders must start the reform process by discussing two simple questions: 1) Where are we? and 2) Where do we want to go? With this in mind, it is a prerequisite that capacity building includes a focus on the unique needs of independent localities while also connecting school leaders and policy makers in adequately supporting teachers. Until teachers are equipped to collaborate, true quality instruction, which must serve as a significant driver in the reform movement, will cease to exist. Moreover, it is of great importance that district leadership, superintendents, and individual school administrators be afforded ample opportunities to learn through collaboration.

Alberta's reform efforts show that a high degree of initial buy-in from all concerned stakeholder groups is not sufficient. Rather, these interested parties must continuously be kept in the conversation as new systems are implemented and improved. Partnerships forged by stakeholder groups such as school board associations, local business officials, school counsels, and even school superintendents have facilitated the thrust of a unified vision for education through the use of teamwork, cooperation, and compromise. In order to continue to propel

their efforts, stakeholder groups should be accorded recognition and support for their efforts and ongoing partnership.

Relentless High Expectations/Clear Vision

In 2009 after engaging in thousands of conversations with Albertans, the provincial government created a clear policy framework in *Inspiring Education* that pushed a vision in Alberta that outlined a number of the crucial values, skills, and practices that would be necessary for all Albertans to grasp. This broad policy framework drove three clear goals that were to be mastered by every student in Alberta. As part of the creation of one unified vision, much of the reform effort centered on the notion that all students become competent in demonstrating three key attributes to maintain continued success throughout each stage of life.

These three attributes include:

- Engaged Thinker- Alberta must cultivate students with an inquisitive, engaged mind. Students that are prepared to ask "why?" and think critically about the answers they receive.
- Ethical Citizen- Knowing the answer is not enough. Alberta's children must be ethical, compassionate, and respectful to truly grow and thrive.
- Entrepreneurial Spirit- To shape innovative ideas into real-world solutions, Alberta's
 education system should develop motivated, resourceful, and resilient citizens.
 Alberta would do well to encourage students to be bold, embrace leadership, and
 actively seek new opportunities.

As a strategic framework is built by Albertan education officials, the future vision of creating transformational change in a student-centric system is still being emphasized. Expressing a clear vision centered on maintaining high expectations from all parties has empowered additional stakeholder groups to work together as they see education as an important commodity for the entire province.

Investment in Early Child Development

Alberta is acting on brain science research and the strong evidence that early childhood development has an incredibly strong impact throughout an individual's lifespan. Moreover, research continually shows that communities are an integral part of development. In fact, multiple studies have shown that positive community influences can help overcome the negative impact of poverty and other social disadvantage. Therefore, improving early childhood development has been viewed as an integral factor of improving Alberta's education system and student outcomes as a whole.

The Alberta Ministries of Health, Human Services, and Education all collaborate together in order to offer resources to help with the early development for all Albertans. An emphasis has been placed on building strong connections with the community as part of the dialogue for implementing early childhood initiatives. Officials focused on four key outcomes, which include providing a healthy start to children; enabling parents to provide a nurturing, stable

environment for children; supporting a child's ability to realize their full developmental potential when they enter school; and maintaining safe, supportive communities for children to learn, grow, and thrive.

In focusing on Early Childhood
Development (ECD), stakeholders such as
the Norlien Foundation have helped to
create *The Alberta Family Wellness Initiative* which serves as a catalyst for
concrete action and change to advance the

"By creating the conditions that Michael Fullan outlines as necessary for *systemness*, Alberta has been able to launch a successful comprehensive early learning program."

-Justina Cross, the Packard Foundation

understanding and approach to childhood development and its life-long impact on addition and other negative outcomes. The initiative is aimed at understanding the connection between early brain and biological development and the prevention of negative outcomes.

Also, an emphasis has been placed on using the Early Development Instrument (EDI), which is structured as a population-based measurement. Questionnaires are completed for each child by their kindergarten teachers once they have had an opportunity to get to know their students. Using this data, results are aggregated and analyzed at the provincial, community, and sub-community levels to help community leaders decide what programs need to be created and implemented in the province for improving services and outcomes for young children. Community coalitions are asked to establish sustainability plans in order to allow for continued positive change.

Mastering the Basics from Inception and the Significance of Teachers

From the earliest stages, leaders did not overlook the importance of understanding and conquering the basics of the reform movement before attempting to master subsequent challenges. As previously stated, a significant focus was placed on the ineffectiveness of the structure of the preceding the accountability system and the necessity to suspend traditional standardized testing mechanisms in order to achieve greater outcomes.

Leaders asked what actions were fundamentally necessary in order to lay the early groundwork for creating a new provincial system that would facilitate the motivation and deeper learning of all students. For example, from the launch of the transformation measures, leaders in Alberta recognized the importance of teachers and teacher education programs in serving as a key component for the successful implementation of change. There was acknowledgement that the preparation of future teachers through robust higher education programs would be of long-term value. Additionally, in order to retain effective educators from one year to the next, Alberta has one of the highest average starting teacher salaries in Canada. Education leaders in Alberta stressed the significance of collaboration and professional development as integral factors in both teacher quality and retention. There is an agreement that until classroom teachers are equipped with the necessary skillsets to effectively lead, signature reform measures like the implementation of an up-to-date, student-centered curriculum would not be effective in increasing student outcomes.

As part of Alberta's plan for positive growth, an emphasis was placed on technology as a necessity for all Albertans to grasp in order to meet the needs of a rapidly changing global society. Additionally, in order to not only increase overall outcomes in the later stages of implementation but also ensure sustained buy-in from stakeholders from across the continuum, Alberta's government made a conscious effort to produce a vertically integrated system that would be applied from early learning to career and higher education.

Tri-Level Reform

In order for systems change to be successful, striking the right balance between local autonomy and centralization is deemed necessary. An investment in capacity building throughout the province in previous years and years of "good talk" regarding a unified vision for public education has encouraged collaboration from every level of reform. In Alberta, the Education Ministry developed a unified and widely-shared vision in addition to strong beliefs about student learning and well-being that falls within the parameters set by government leaders in the province.

The idea behind tri-level reform is that success can only arise when the state, districts, and schools work in a three-way partnership in order to drive a series of changes at hand. At each level, establishing processes that "systematize the work" is imperative to encouraging all

parties to remain on board to drive reforms. Capacity building needs to include both a focus on the unique necessities of local districts and a link between school leaders and policy makers in order to adequately support key pieces of reform. Furthermore, by sharing standards, metrics, and evidence to measure progress, an opportunity is presented for an increase in overall transparency. Tri-level reform also allows for capacity building that encourages a mutual commitment accountability, which has the ability to establish collaboration between different districts and schools.



Equity

One of the most frequently cited barriers to the improvement of student outcomes in the U.S. is the considerable funding inequality that exists when making both state-to-state and district-to-district comparisons. Canada's federated system for funding education places almost all responsibility for school spending at the provincial level. In 2013, approximately 17 per cent of the Government of Alberta's 2013 budget was allocated for education. Revenues for public education are collected from two funding streams to provide stability. These include general revenues and education property taxes. Only 32 per cent of the funding from the provincial level for education finance is levied through property taxes, which are later redistributed based on a basic funding formula. The funding framework in Alberta has changed dramatically with the ongoing implementation of reforms. The model distributes funds equitably across the province while simultaneously providing locally elected boards with flexibility and the total spending discretion of over 98 per cent of school funding. In addition, Catholic Education in Alberta is publically funded in order to allow for greater equity and choice within the education

system. In creating a framework for funding, Alberta has generated a method of distributing funding to school authorities in a consistent and equitable manner while also leaving them with the discretion to use funding to meet the individual needs of their students.

Conclusion and Key Challenges

Alberta's public education system provides a promising example of how systems change in education can be created through continuous collaboration and a careful balance in autonomy. Nevertheless, Alberta's vision for reform is still very much a work in progress. As many reforms have yet to be implemented or evaluated, few conclusions can be made regarding the overall effectiveness of this particular case study as it exists in its current stages. Aside from a lack of long-term evaluations measuring particular components of the Alberta' reform movement, there still exists significant gaps in data measuring student gains across different demographics, especially in larger districts facing varying degrees of affluence and diversity.

Alberta's successes on PISA help to demonstrate the significance of specific variables such as the quality of teacher education programs as part of the complete picture of its overall success in the educational arena. Above all else, Alberta demonstrates the value of engaging

stakeholders in the change process and treating public education as a public good for the province - not only a private benefit for individuals.

"Public engagement seems to be commonly used in Alberta at all levels of the system."

-Susan Sandler, the Sandler Foundation

To allow for real change to occur, all stakeholder groups are more effective by working together in

constant dialogue with the aim of reaching desired outcomes. A clear long-term vision that represents the interests of all parties will encourage further collaboration. Such a shift in the mindset and culture of education reform in the U.S. could serve to accelerate progress here.

Michael Fullan notes that in order to achieve successful systems change, six essential drivers must be in place. These drivers which have been detailed throughout this report include getting accountability right (or at least not wrong); a common interest in investment in capacity-building; implementation of cohesive policies and strategies; learning from implementation; maintaining relentless high expectations; and cultivating systemness. As the current educational system in the U.S. has proven, it is a true challenge to have each of these individual drivers in place simultaneously to drive cutting edge reform.

U.S. Education Delegation to Alberta, Canada January 2014

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NEA Foundation

Catherine Boehme

Florida Education Association

Stephen Bowen

Council of Chief State School Officers

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California Department of Education

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U.S. Study Tour of the Alberta Education System January 13-16, 2014

AGENDA

Monday, January 13, 2014

4:30 - 5:30 pm	Tour of the historic Fairmont Hotel Macdonald – meet in the lobby
5:30 – 8:30 pm	Opening Reception and Dinner – Fairmont Hotel, Drawing Room
	Welcome, introduction of U.S. delegates, and orientation to Alberta

Public School System, agenda, learning objectives, and logistics.

Tuesday, January 14, 2014

7:00 – 8:00 am	Breakfast Buffet in mezzanine area outside of the Drawing Room
8:15 am	Meet in the Lobby for Transport to Schools (all rides will depart no later than 8:30)
9:00 – 11:30 am	School Visits in small groups to a range of elementary, middle and high schools, including classroom observations and meetings with principals, teachers, and students.

Edmonton Public School Board:

- Westglenn School (K-6)
- A. Blair McPherson School (K-9)
- Michael Strembitsky School (K-9)
- D.S. Mackenzie School (7-9)
- M.E. Lazerte School (10-12)

Edmonton Catholic Public School Board:

- Monsignor Fee Otterson School (K-9)
- Father Michael Troy School (7-9)
- Mother Margaret Mary School (9-12)

11:30 – 12:00 pm Transfer to meeting site at the Fairmont Hotel Macdonald

12:00 – 1:30 pm Lunch Panel Discussion in the Drawing Room

Research-based Collaboration to Build a Comprehensive System of Early Childhood Support and Education

Resource Experts:

- Sheryl Fricke, Executive Director, Early Childhood Development Priority Initiative, Ministry of Human Services
- Sue Lynch, Project Director, Early Child Development Mapping Project, University of Alberta for the Ministry of Education
- Paula Tyler, Executive Director, Norlien Foundation

1:30 – 2:00 pm Transition Break

2:00 – 3:30 pm Transforming Education in Alberta

Ministry officials will provide an overview of the Alberta strategy that has led to the current success. They will outline the strategy for *Inspiring Education*, Alberta's vision for students to be engaged thinkers, ethical citizens with an entrepreneurial spirit. Session leaders will highlight directions in curriculum redesign, assessments, inclusive education, high school flexibility (competency-based system), dual credit initiative, technology, and the funding framework for equitable inputs and outcomes.

Ministry Officials:

- Greg Bass, Deputy Minister of Education
- Ellen Hambrook, Assistant Deputy Minister, Program Standards and Assessment Division
- Dean Lindquist, Assistant Deputy Minister, Learning Supports and Information Management Division
- Michael Walter, Assistant Deputy Minister, Strategic Services Division
- Gene Williams, Assistant Deputy Minister, People and Research Division

3:30 – 3:45 pm Transition Break

3:45 – 4:30 pm Role of the Alberta Teachers' Association in Transforming Learning

- Mark Ramsankar, President
- Gordon Thomas, Executive Secretary
- Dennis Theobald, Associate Executive Secretary

4:30 – 5:30 pm	Breakout Dialogue Sessions with Deputy Minister, Assistant Deputy Ministers, and the Alberta Teachers Association
5:30 – 6:00 pm	Transition to Reception and Dinner in the Jasper Room, Fairmont Hotel
6:00 – 8:30 pm	Dinner and Discussion: Michael Fullan will present an international perspective, linking the drivers of whole system change to the Alberta experience by offering an analysis of the strategic changes needed to provide coherence and focus in the next phase.

Wednesday, January 15, 2014

7:00 – 8:00 am	Breakfast Buffet in mezzanine area outside of the Drawing Room
8:15 am	Meet in the Lobby for Transport to Schools (all rides will depart no later than 8:30)
9:00 – 11:30 am	School Visits to a range of elementary, middle and high schools including classroom observations and meetings with principals and teachers
11:30 – 12:00 pm	Transfer to meeting site at the Fairmont Hotel
12:00 - 1:00 pm	Lunch in mezzanine area outside the Drawing Room
1:00 – 3:00 pm	Vision in Action – A View from the Districts Case Studies: Teams of superintendents and leaders from three districts will provide insight into their strategies to transform their schools. These real life examples of change in action will connect to issues the US is facing with implementing common core standards, new assessments and new instructional processes to promote 21 st century learning. Participants will have an opportunity for interaction and questions.

District Leaders:

Greater St. Albert RCSSD No. 734

- David Keohane, Superintendent of Schools
- David Quick, Assistant Superintendent of Learning Services

Parkland School Division No. 70

- Tim Monds, Superintendent
- Kelly Wilkins, Deputy Superintendent

Calgary Board of Education

• Naomi Johnson, Chief Superintendent of Schools

- Cathy Faber, Superintendent of Learning Innovation
- Brant Parker, Director of Innovation and Learning Technology
- Ronna Mosher, Director, Office of the Chief Superintendent

3:00 - 3:30 pm Break

3:30 – 5:00 pm Partnerships: Making Inspiring Education a Reality

A panel of representatives from a range of stakeholder groups will share their role and insights into both the strategy that led to current success and the road ahead.

Resource leaders:

- Jim Gibbons, Senior Education Advisor Alberta School Board Association (ASBA)
- Dexter Durfey, President
 Association of School Business Officials of Alberta (ASBOA)
- Michele Mulder, Executive Director Alberta School Councils' Association (ASCA)
- Barry Litun, Executive Director
 College of Alberta School Superintendents (CASS)

5:00 – 6:00 pm Networking reception in mezzanine area outside of Drawing Room

6:00 – 6:30 pm Meet in lobby for transport to dinner at the Art Gallery of Alberta (mini-bus leaving at 6:00 pm and 6:20 pm)

6:30 – 9:00 pm Zinc Restaurant at the Art Gallery of Alberta

Delegations reflect on the relevance of Alberta's strategies to their states

and national efforts in the U.S.

Thursday, January 16, 2014

7:00 – 8:30 am Breakfast Buffet in mezzanine area outside of the Drawing Room
8:30 – 11:00 am Insights and Implications: Applying insights from the two days in Alberta

to educational improvement in the US context. Delegates share and $% \left(1\right) =\left(1\right) \left(1\right) \left$

discuss key takeaways.

11:00 am Adjourn