

BUILDING ESSENTIAL SKILLS TODAY (BEST)

Self-Direction Toolkit

Version 1.0 | best-future.org

About BEST and the Student Self-Direction Toolkit

In an effort to elevate the teaching and assessment of essential skills in our schools, BEST is working to shift how students learn and demonstrate essentials skills like communication, collaboration, creativity, and self-direction (aka Work-Study Practices). We are doing this through a developmentally backed research framework, teacher professional development, new instruction in the classroom, and use of a statewide performance assessment system rooted in competency-based education (PACE). We are also building the evidence base that this works for all students.

BEST is a dynamic group of teachers and leaders in four New Hampshire school districts (Laconia, Rochester, Sanborn, and Souhegan), the New Hampshire Learning Initiative (NHLI), the National Center for Innovation in Education (CIE), the New Hampshire Department of Education, and KnowledgeWorks all powered by JFF with funding from the William and Flora Hewlett Foundation.

The rubrics and tools in this toolkit are designed to support teachers in K-12 classrooms, with particular focus on grades 6-12, who are interested in instructing and assessing in self-direction as a developmental progression. Used as a whole, the rubrics and accompanying tools should create a strong body of evidence to support student learning and growth in self-direction. These are the first versions of the tools and we acknowledge that they need to be piloted in a range of settings with a broader group of students. We welcome feedback and input from colleagues in the field and ask that you share that with us at info@best-future.org.

The versions presented here are the result of a three-year research-practice partnership between teachers and researchers in New Hampshire. The partnership worked through multiple, continuous improvement rounds to ensure all elements could easily be taken up by students and teachers in grades 6-12. The process ensured strong alignment with the Essential Skills and Dispositions Framework: Developmental Frameworks for Collaboration, Communication, Creativity, and Self-Direction co-developed by the National Center for Innovation in Education and the Educational Policy Improvement Center (now known as Inflexion). Without the dynamic exchange between practice and research expertise, this toolkit would not have been possible.

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Self-Direction Rubric Introduction

Self-direction is a competency that includes both the intrapersonal skills of self-awareness and reflection and the interpersonal skills of collaborating with others to elicit feedback and support during the learning process. While exercising self-direction, students collaborate with and seek input from others, identify their interests and curiosity about topics under study, and apply their ideas to shape the learning process. This includes learning how to define learning goals and craft inquiries / driving questions, reflecting on their process, reassessing and adjusting their approach when needed, drawing on previous experiences to guide their decisions, and demonstrating care about the quality of their work and about meeting the deadlines they set. Teaching and learning focused on self-direction facilitates the process for students to take more ownership of their learning.

The self-direction tools provided in the toolkit support student pathways to becoming self-directed and self-determined learners. Each rubric is aligned with the Essential Skills and Dispositions Framework. Unlike discipline-specific learning progressions and rubrics, the Framework's developmental progressions reflect components essential to the skill itself and describe growth dependent on years of active exploration, experimentation, setbacks, and ongoing reflection. The rubric is intended to be used as an instructional tool to guide learning, as well as an assessment tool to provide feedback-related success criteria and next steps for learning (rather than simply generating a score).

The self-direction rubrics offer a developmental progression describing age-appropriate behaviors that become more complex along the journey from beginner to expert at each grade band (grades K-2, grades 3-5, grades 6-8, and grades 9-12). According to the Framework, a beginner is anyone learning a skill, whether an adult, teenager, or young child. Regardless of age, beginners can be active explorers, capable of observing, mimicking, and learning from others, if given the right support within a learning environment. In other words, a student in second grade could exhibit behaviors described at the Extending (expert) level for the K-2 grade band; while a ninth-grade student might start the school year at the Emerging (beginner) level at the grades 9-12 band.

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Each of the interrelated components of self-direction plays an essential role. Together these components create the full expression of self-direction. Likewise, learners may be more advanced with some components than others. Though components could be viewed as standalone skills, each provides a unique contribution tailored specifically to the essential skill of self-direction. These components include **Initiative and Ownership, Goal Setting and Planning**, and **Engaging and Managing. Self-Awareness** and **Monitoring and Adapting** are the metacognitive skills that are consistent across all of the essential skills and dispositions in the Framework (collaboration, communication, creativity, and self-direction). The following are the descriptors of the self-direction components, each with a focus question for students:

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Dimensions of Self-Direction



Self-Awareness

Reflecting on past experiences to evaluate one's own strengths, limitations, motivations, interests, and aspirations within different learning contexts.

"What am I learning about myself, as a learner?



Initiative and Ownership

Taking responsibility for learning, finding purposeful driving questions, shaping opportunities to fit personal interests and approach to learning and, and seeking input from others.

"How can I integrate my personal interests into how I approach new learning?"

Goal Setting and Planning

Developing long-term goals, establishing meaningful learning targets, identifying effective strategies, and planning out steps.

"How can I break down a complex task and develop concrete steps to accomplish it?"



Engaging and Managing

Seeking out relevant resources and information to support learning goals and refining strategies; maintaining effective pace, reaching short-term benchmarks and long-term goals.

"What am I learning about locating resources, managing my time, and seeking help when I need it?"



Monitoring and Adapting

Evaluating progress, adapting strategies, seizing failure in order to grow from mistakes, and attributing success to effort, persistence, access, opportunity, help, and time.

"Am I able to see when something isn't working well, adjust my approach, and learn from missteps?"

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The four performance level descriptors in the rubric are drawn from the research base in the Essential Skills and Dispositions Framework describing a developmental progression of self-directions skills and abilities.



Emerging

The student is new to the task and context, follows directions or modeled behaviors, responds to guidance, and learns to use skills in a controlled context.



Developing

The student is familiar with a specific task and context, follows rules, purposefully explores through trial and error, looks to others for support, uses known steps to complete a task, and discovers patterns.



Applying

The student completes different forms of tasks in related contexts, analyzes situations to plan approach, refines approach by testing ideas, selectively draws on expertise of others, and identifies familiar aspects of tasks to determine relevant strategies.



Extending

The student experiences wide variations of tasks in different contexts, analyzes unfamiliar situations/contexts, seeks connections to others to broaden skills, looks for connections in other areas and tailors application of skills, and notices what is missing.

Prior to using this rubric with a performance task, it is recommended that the teacher reviews the rubric with students, allowing them the opportunity to ask clarifying questions. You may want to conduct a text rendering protocol with the students, or use this think aloud protocol developed by Dr. Karin Hess as a guide.

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Dimensions of Self-Direction



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BEST Self-Direction Rubric

grades K-2

	Self-Awareness	Initiative & Ownership	Goal Setting & Planning	Engaging & Managing	Monitoring & Adapting
	Reflecting on past experiences **to evaluate one's own strengths, limitations, motivation, interests,** and aspirations within different learning contexts.	**Taking responsibility** for learning, finding purposeful driving questions, **shaping opportunities** to fit personal interests and learning style, and **seeking input** from others.	Developing long-term **goals,** establishing meaningful **learning targets,** identifying effective **strategies,** and **planning out steps.**	Seeking out **relevant resources and information** to support learning goals and **refining strategies.** Maintaining effective **pace,** reaching short-term benchmarks and long-term goals.	**Evaluating progress, adapting strategies,** seizing failure in order to **grow from mistakes,** and attributing success to effort and motivation.
Emerging	I can... Identify the tasks I'd like to work on, when I am given choices.	I can... Try new experiences to find out what might be interesting to me, with support.	I can... Follow a process my teacher showed me to identify steps or strategies that will help me meet a learning goal.	I can... Explain what I learned when I used a resource, or when I used a strategy guided by my teacher.	I can... Keep working on learning tasks with encouragement from others.
Developing	I can... Explain why I made a choice, describing my strengths, my interests, or why I am not interested in doing a task.	I can... Select and complete tasks I am interested in doing, with support from others.	I can... Explain how or why the strategy used at each step of a plan would help me complete a familiar task.	I can... Follow a process my teacher taught me to select the best resources or strategies needed to complete a specific task.	I can... Provide examples of how I changed my approach or made the quality of my work better, when prompted.
Applying	I can... Describe how I used my strengths to complete a learning task.	I can... Ask for help or ask relevant questions that help me keep working to complete a task.	I can... Follow a process my teacher taught me to plan the steps and strategies needed to complete a new task.	I can... Follow a process using checkpoints identified by my teacher or my peers to make progress toward completing multistep tasks.	I can... Identify the strategies that worked well and explain why I think they worked.
Extending	I can... Compare examples of my past and present work to show how I used my strengths to make some progress.	I can... Work with my peers to develop a new learning task or broaden an existing task to make it more interesting to us.	I can... Use feedback from others to decide if my plan will work and make changes to improve my plan.	I can... Describe how I tried different strategies to find the one that worked the best when completing a task.	I can... Tell how and why I might make changes next time to improve the quality of my work.

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BEST Self-Direction Rubric

grades 3-5

	Self-Awareness	Initiative & Ownership	Goal Setting & Planning	Engaging & Managing	Monitoring & Adapting
	Reflecting on past experiences **to evaluate one's own strengths, limitations, motivation, interests,** and aspirations within different learning contexts.	**Taking responsibility** for learning, finding purposeful driving questions, **shaping opportunities** to fit personal interests and learning style, and **seeking input** from others.	Developing long-term **goals,** establishing meaningful **learning targets,** identifying effective **strategies,** and **planning out steps.**	Seeking out **relevant resources and information** to support learning goals and **refining strategies.** Maintaining effective **pace,** reaching short-term benchmarks and long-term goals.	**Evaluating progress, adapting strategies,** seizing failure in order to **grow from mistakes,** and attributing success to effort and motivation.
Emerging	I can... Identify my learning preferences and explain how they relate to my personal strengths, interests, or disinterest.	I can... Describe connections between my personal interests and new learning experiences provided by others.	I can... Follow a teacher-directed process to identify a task-specific learning goal and plan sequenced steps and strategies to complete the task.	I can... Use resources and strategies modeled by others to complete a task.	I can... Make changes to improve the quality of my work when gaps in my understanding or process are identified by others.
Developing	I can... Describe how strategies I've learned in the past can be used in a new learning task.	I can... Use specific examples to explain how the experiences of others have expanded my interests or my learning.	I can... Work with others to set task-specific learning goals and plan steps and strategies to complete the task.	I can... Describe how I used a familiar learning strategy or tried a new approach to complete a multistep task.	I can... Use established checkpoints to help me focus on what to do in each step of my plan to meet learning goals.
Applying	I can... Locate examples in my work to explain why a strategy was needed and how I successfully used it.	I can... Proactively seek input from others and ask relevant questions related to shaping my learning.	I can... Follow a familiar process to set learning goals for a new task and plan the steps and strategies to complete the task.	I can... Maintain my focus and pace by meeting agreed-upon checkpoints for completing a multistep task.	I can... Identify ways to refine my strategies or process when I know a change is needed.
Extending	I can... Identify how I used new strategies to overcome a problem I was stuck on so I could complete a task.	I can... Take responsibility for my own learning by identifying new areas of interest and then collaboratively developing new learning tasks.	I can... Use examples provided to decide what's needed for a task or project and develop a plan with steps and strategies to complete the task or project.	I can... Describe how or why I changed a familiar approach so I could accomplish learning that was more complex.	I can... Evaluate how changes in my approach could improve the quality of my work or my learning next time.

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BEST Self-Direction Rubric

grades 6-8

	Self-Awareness	Initiative & Ownership	Goal Setting & Planning	Engaging & Managing	Monitoring & Adapting
	Reflecting on past experiences **to evaluate one's own strengths, limitations, motivation, interests,** and aspirations within different learning contexts.	**Taking responsibility** for learning, finding purposeful driving questions, **shaping opportunities** to fit personal interests and learning style, and **seeking input** from others.	Developing long-term **goals,** establishing meaningful **learning targets,** identifying effective **strategies,** and **planning out steps.**	Seeking out **relevant resources and information** to support learning goals and **refining strategies.** Maintaining effective **pace,** reaching short-term benchmarks and long-term goals.	**Evaluating progress, adapting strategies,** seizing failure in order to **grow from mistakes,** and attributing success to effort and motivation.
Emerging	I can... Identify my strengths and areas needed for growth, using feedback from others.	I can... Choose a learning opportunity from options provided by others.	I can... Use strategies suggested by others to develop steps to accomplish a project when the specific learning goal has been provided.	I can... Follow a process provided to select resources based on task requirements or suggested criteria.	I can... Make changes to improve my plan or the quality of my work when gaps in my understanding or process are identified by others.
Developing	I can... Analyze how familiar strategies have been used or expanded upon in a new project.	I can... Recognize my own role in learning by proactively asking relevant questions and seeking specific support when needed to complete a task.	I can... Use familiar learning strategies and processes to set a learning goal, develop a plan to meet the goal, and seek feedback from others to refine the plan.	I can... Seek help or try models of others when using new resources or strategies to accomplish a multistep task or project.	I can... Use established criteria or benchmarks to evaluate whether I should adapt a strategy, refine my methods, or consider a different approach to improve quality.
Applying	I can... Use relevant prior work or experiences to locate and explain examples of when I successfully used new learning strategies.	I can... Shape new learning opportunities by engaging with others to generate learning goals that match personal interests or strengths.	I can... Analyze project-specific expectations and resources needed to formulate a plan with key steps and strategies to complete the project.	I can... Maintain appropriate focus and pace using agreed-upon benchmarks for completing a multistep task or project.	I can... Evaluate my progress, citing examples of successful strategi used and analyzing the effectiven of changes made to complete a high-quality multistep task or project.
Extending	I can... Cite examples from my work to evaluate my progress in overcoming barriers and expanding my strengths.	I can... Propel my own learning in more meaningful directions by redefining a task challenge.	I can... Diagnose project-specific expectations, set personally meaningful learning goals that may exceed requirements, and create a plan to complete them.	I can... Analyze how or why I adapted strategies or refined my pace or approach based on feedback or when I faced roadblocks.	I can... Analyze my learning in terms of meeting project goals, transforming mistakes into new learning, and enhancing work quality and personal growth.

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BEST Self-Direction Rubric

grades 9-12

	Self-Awareness	Initiative & Ownership	Goal Setting & Planning	Engaging & Managing	Monitoring & Adapting
	Reflecting on past experiences **to evaluate one's own strengths, limitations, motivation, interests,** and aspirations within different learning contexts.	**Taking responsibility** for learning, finding purposeful driving questions, **shaping opportunities** to fit personal interests and learning style, and **seeking input** from others.	Developing long-term **goals,** establishing meaningful **learning targets,** identifying effective **strategies,** and **planning out steps.**	Seeking out **relevant resources and information** to support learning goals and **refining strategies.** Maintaining effective **pace,** reaching short-term benchmarks and long-term goals.	**Evaluating progress, adapting strategies,** seizing failure in order to **grow from mistakes,** and attributing success to effort and motivation.
Emerging	I can... Analyze how my interests have sometimes been in conflict with expectations of others and generate ways I might overcome this in the future.	I can... Choose a new learning opportunity from options provided and explain how it reflects personal curiosity or interests.	I can... Set a project-based goal modeled after examples provided and use familiar strategies to develop steps and strategies to accomplish it.	I can... Follow a process provided to select reliable resources based on task requirements or suggested criteria.	I can... Begin a course of action, seeking help when gaps in my progress, understanding, or work quality are identified by me or others.
Developing	I can... Explain how my strengths or strategies used successfully in the past can be applied in a new learning situation.	I can... Collaborate with others to share control of shaping the direction of a new learning task while pursuing my interests or learning goals.	I can... Analyze project-specific expectations, identifying resources needed, strategies suited to completing the tasks, and steps to complete the project.	I can... Adapt strategies for my approach, with help as needed, when accessing more complex information or resources.	I can... Use established benchmarks or feedback to monitor quality or progress, consider alternative approaches, and revise my plan, as needed.
Applying	I can... Analyze my ability to adapt or expand my strengths and interests to successfully complete a new task or project.	I can... Take responsibility for my own learning by establishing driving questions to guide my own learning process.	I can... Set a personally meaningful project-based goal, with steps to complete the plan and possible challenges along the way with alternative strategies or resources needed to complete the project.	I can... Anticipate complexities of task completion and schedules, and explain how I adjusted my pace appropriately to meet agreed-upon deadlines.	I can... Evaluate my progress and work quality, citing examples of successful strategies used and analyzing the effectiveness of changes made to complete a multistep task or project.
Extending	I can... Cite examples from my work to evaluate how I have expanded my strengths and interests by setting learning goals beyond assigned tasks.	I can... Seek input to help me analyze the content and context of learning tasks in order to reshape, extend, or enhance my own learning.	I can... Independently seek input on a project-based learning goal and plan that pushes my learning beyond the task, and use feedback to improve the plan.	I can... Provide examples of how I set and maintained a high standard of work quality and how I plan to improve my process in the future.	I can... Analyze my learning by citing examples of how I met or exceeded project goals, transformed mistakes into new learning, and enhanced my personal growth.

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grades 6-12

TOOL 1:

Student Assessment of Self-Direction Growth

Teacher Instructions

Below, please find teacher instructions to guide your use of Tool 1. These instructions are designed to address the following questions:

- **Why** was Tool 1 developed?
- **When** should teachers and students use Tool 1?
- **Where,** in which courses, should Tool 1 be used?
- **Who** should use Tool 1?
- **How** should teachers and students use Tool 1?



Self-direction for students is not a skill that one can develop quickly. Rather, it is developed over time, especially as learning progresses. Tool 1 is designed to help students understand the specific skills that comprise self-direction, become aware of their current performance level in each skill, and gauge growth over time. To that end, this tool should be used in tandem with the Self-Direction Rubric for the appropriate grade level, and can serve as a reference for students regarding their stage of development in each skill area, enabling them to gauge progress over time in their ability to be self-directed when completing performance tasks in any content area.

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When

This tool should be administered at least twice during the year, such as early in the school year and again mid-year, or at the beginning of a second term and again at end of the term, providing an opportunity for students to review their growth in self-direction. Students' self-assessments then become a record of their progress and growth in the five specific domains of the Self-Direction Rubric.

Additional Options: Teachers and students may want to accompany self-assessment ratings with a body of evidence that is stored in a portfolio and which might be used to demonstrate mastery of desired self-direction skills.

Where

Tool 1 is designed to be used within any content area or course.

Additional Options: If your school offers student advisory periods, the use of Tool 1 might be guided by the student's advisor in collaboration with subject-area teachers—and could be used across multiple courses/subjects.

Who

Teachers provide students with an orientation to the Self-Assessment Rubric and offer students guidance in completing Tool 1. Once students are clear on how to self-assess, students should independently rate themselves using the tool and rubric.

Additional Options: Teachers may want to encourage students to engage in peer assessments of self-direction skills after students have independently assigned their self-assessment ratings.

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How?

Use of Tool 1 can be divided into 4 steps. Students do the following:

Step 1: Review the Self-Direction Rubric.

Step 2: For each of the five skill areas, reflect on current use of the skill, including strengths and areas for growth.

Step 3: Select the level that best reflects your current ability and explain why you chose this level.

Step 4: Identify one area of strength to build on, and one area to improve.

STEP 1:

Review the Self-Direction Rubric.

Before students can self-assess their self-direction, they need to understand the meaning of the skills and their defining characteristics.

- Provide each student with the Self-Direction Rubric and a copy of Tool 1.
- Read through the rubric with the student(s) to assess their understanding of the vocabulary within the rubric, and to reinforce understanding and validate the content of the rubric for students. Ask for clarifying questions, probe for examples, talk about one's own self-direction journey, emphasize this will not be associated with a grade, encourage comparisons and discussions, and then check for understanding.
- Next, have students read through the Student Assessment of Self-Direction Growth tool and allow for clarifying questions. This practice may vary in necessity by grade level depending on how familiar students are with the process of using the tool as well as the rubric. This practice of clarification is at the teacher's discretion.

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STEP 2:

For each of the five skill areas, reflect on your current use of the skill, including strengths and areas for growth.

Once students understand the five self-direction skill areas and rubric wording, they can begin to self-assess their ability.

- Introduce the second column of Tool 1: Student Assessment of Self-Direction Growth. This column asks students to reflect on their current use of each of the five self-direction skill areas.
- Provide guidance to students on how to reflect on their current ability by responding to the following two prompts.
    - ***What have I accomplished in past work that makes me feel I can be confident in this area?***
    - ***What do I feel I can work on to be more confident in this area?***

Students may need assistance in reflecting on the first self-direction skill before being able to reflect independently on the rest of the self-direction skill areas. eachers can use strategies such as pairs share, fishbowl, or role plays to introduce or practice what self-reflection might look like.

STEP 3:

Select the level that best reflects your current ability and explain why you chose this level.

Once you are confident that students are clear on Tool 1 and its use, they should be asked to independently complete an assessment of their self-direction ability in each of the five skill areas. Some students may be ready to do this independently, while others might benefit from short peer critique sessions before they decide on their focus.

- Students should use the Self-Direction Rubric to review the descriptors of each of the four performance levels (Emerging, Developing, Applying, and Extending).

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- Students should select the level that best reflects their perception of their current skill level. These self-assessment ratings should be assigned in column three.
- Students should provide an explanation of why they assigned that rating in column four, using concrete examples.

Additional Options: If a student is creating a portfolio to accompany their use of Tool 1, they could be invited to upload work samples and other "evidence" to their e-portfolio to illustrate their self-assessment ratings in each of the five areas.

STEP 4:

Identify one self-direction skill area of strength to build on, and one self-direction skill area to improve.

As a final step, students will review their responses and ratings in Tool 1 and respond to the following two questions ***with concrete examples from their work*** to identify how they can build on a self-direction skill area of strength, and address a self-direction skill area in need of growth.

- **Building on strengths:** How do I plan to exercise or use my strengths, or what do I want to accomplish to make myself feel more confident in what I am good at?
- **Areas to improve:** In which area do I need to increase my confidence?

Additional Options: Once students have completed their self-assessments, teachers may want to use the results to inform plans for providing scaffolding or targeted instruction, and document the formative assessment information (progress made) in the student's ongoing portfolio or collected body of work.

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grades 6-12

TOOL 1:

Student Assessment of Self-Direction Growth

To use this tool, follow the four steps listed below:

Step 1: Review the Self-Direction Rubric.

Step 2: For each of the five skill areas, reflect on current use of the skill, including strengths and areas for growth.

Step 3: Select the level that best reflects your current ability and explain why you chose this level.

Step 4: Identify one area of strength to build on and one area to improve.

Using the Self-Direction Rubric, complete Table 1 by reflecting on your use of each self-direction skill area (column two), assign a rating to reflect your current level (column three), and provide an explanation for your rating (column four).

Name:

Date:

Grade:

Class:

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TABLE 1.0 | Self-Assessment of Self-Direction Skills

1. Self Direction	2. I can... What have I accomplished in past work that makes me feel I can be confident in this area? What do I feel I can work on to be more confident in this area?	3. My level is... How much guidance do I need to feel confident in my work?	4. Why that level? Explain why you chose your level using the Self-Direction Rubric as a guide. What evidence from past work can you use to support chosing this level?
Self-Awareness *Reflecting on past experiences to think about my:* • Strengths • Challenges • Motivations • Interests		◯ Emerging ◯ Developing ◯ Applying ◯ Extending	
Initiative & Ownership *Taking responsibility for my own learning by:* • Asking questions • Selecting learning opportunities that interest and challenge me • Getting input from others		◯ Emerging ◯ Developing ◯ Applying ◯ Extending	
Goal Setting & Planning *Creating long-term goals* • Setting "right now" goals • Creating a plan and mapping it with steps		◯ Emerging ◯ Developing ◯ Applying ◯ Extending	

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1. Self Direction	2. I can...	3. My level is...	4. Why that level?
Engaging & Managing *Using appropriate resources and information* • Staying on track • Using feedback to help move forward		○ Emerging ○ Developing ○ Applying ○ Extending	
Monitoring & Adapting *Having a growth mindset* • Checking my work • Adapting when things are not working		○ Emerging ○ Developing ○ Applying ○ Extending	

Identify one self-direction skill area of strength to build on, and one self-direction skill area to improve.

As a final step, look at your final responses in the table above and respond to the following two questions ***with concrete examples from your work*** to identify how you can build on a self-direction skill area of strength, and address a self-direction skill area in need of growth.

- **Building on strengths:** How do I plan to exercise or use my strengths, or what do I want to accomplish to make myself feel more confident in what I am good at?
- **Areas to improve:** In which area do I need to increase my confidence?

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grades 6-8

TOOL 2:

Self-Direction Road Map Grades 6-8

Teacher Instructions

My Self-Direction Road Map



STEP 1

Task Goals & Action Plan

Understand the task and learning goals
Make my action plan

STEP 2

Self-Direction Goal & Action Plan Review

Select one self-direction goal for this task
Get input from others and make changes to improve my plan

STEP 3

Mid-Task Checkpoint

Reflect on my progress
Get input from others
Make changes to my plan, if needed

STEP 4

Post-Task Reflection

Reflect on my work and learning
Share evidence of progress, learning, and reflections

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Below, please find teacher instructions to guide your use of Tool 2. These instructions are designed to address the following questions:

- **Why** was Tool 2 developed?
- **When** should teachers and students use Tool 2?
- **Where,** in which courses, should Tool 2 be used?
- **Who** should use Tool 2?
- **How** should teachers and students use Tool 2?



Self-direction is a skill that includes both the intrapersonal skills of self-awareness and reflection, and the interpersonal skills of collaborating with others eliciting feedback and support in the learning process. The Self-Direction Road Map supports and provides evidence for growth in students' self-direction skills such as **Self-Awareness** of their interests and learning goals, **Initiative and Ownership** in establishing their inquiry questions, **Goal Setting and Planning** by creating an action plan, **Engaging and Managing** the flow and efficiency of their work along the way, and **Monitoring and Adapting** their progress through a process that includes peer review and feedback.

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When?

The Self-Direction Road Map is designed to be used in conjunction with an assigned project or performance task. The Self-Direction Road Map provides guidance to students as they follow the four steps in the project planning process as illustrated in the Self-Direction Road Map graphic.

Additional Options: Teachers may use this as an instructional tool for a wide variety of purposes throughout the school year. It can also serve as an evidence collection tool for assessment.

Instructional supports can be found at best-future.org.

Where?

The Self-Direction Road Map may be used within any content area or course where students are involved in a performance task or project-based learning.

Additional Options: Instructional supports can be found at best-future.org.

Who?

Teachers provide initial orientation and guidance to students in using the Self-Direction Road Map. After students demonstrate that they know how to use the tool and review protocols, teachers can determine the degrees to which students need ongoing support or could be expected to use the tool independently (see additional options below).

Additional Options: Teachers, especially those with students who have limited experience with self-direction, may want to use the Self-Direction Road Map primarily as an instructional support tool for

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building students' self-direction skills. Alternatively, teachers may want to use the Self-Direction Road Map primarily as a means for gathering the evidence needed to assess student self direction. In this case, teachers will want to orient students and ensure that they clearly understand its use, but then refrain from offering teacher support as students complete the Self-Direction Road Map independently. In either scenario, it is suggested that students be expected to complete Step 4: Post-Task Reflection questions on their own.



Prior to introducing the Self-Direction Road Map, review the self-direction rubric and the *Tool 1: Student Assessment of Self-Direction Growth* with students, allowing them the opportunity to ask clarifying questions. The rubric introductionmodule in the self-direction toolkit provides guidance on introducing the rubric.

Introduce the Self-Direction Road Map to students at the start of the task or project (i.e., when it is first assigned) and walk them through the Self-Direction Road Map graphic to provide an overview of how the tool will be used to document and support their work. Each student should have a copy of the entire Self-Direction Road Map packet, including:

Self-Direction Road Map

Step 1: My Goals and Action Plan

Step 2: My Self-Direction Goal and Plan Review and the Action Plan Review Protocol

Step 3: Mid-Task Checkpoint and Mid-Task Checkpoint Review Protocol

Step 4: Post-Task Reflection and Self-Direction Skills Table

Appendix: My Updated Action Plan

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STEP 1:

Task Goals and Action Plan

At this initial step, you will orient students to the tasks for completing Step 1 and ensure that they are clear on the expectations listed below. Students can use either the paper form of the action plan (Table 1) or you may provide students with an electronic copy that can be updated over time.

- Students articulate their learning goals, taking into consideration their interests that may support their motivation through the task; e.g., *asking themselves what about this learning is important to me.*
- After determining the learning goals and inquiry questions, students design their action plan (Table 1), listing the steps they need to complete the task and the strategies they will use to accomplish each step.
    - For example, one step may be to research the topic and find reliable resources—a strategy to achieve that step is to contact the librarian and access the educational research databases.
- Students identify resources for each step, and apply a target start and end date.
- Students "check off" the step once it has been completed.

Additional Options: If you are using formative assessment instructional strategies, then the teacher or students could add success criteria to this section.

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STEP 2:

Self-Direction Goal and Action Plan Review

Orient students to the tasks for completing Step 2 and ensure that they are clear on expectations—selecting a self-direction skill to focus on during their task or project. At this step, students will review the self-direction rubric and the Tool 1: Student Assessment of Self-Direction Growth, and identify the skill that they will focus on in this project. Gathering and responding to feedback is a key aspect of self-direction and is identified in the self-direction rubric. While the peer review protocol is recommended for all grade levels (but not required), teachers should model and always monitor how to respectfully give and receive feedback. If students completed the Tool 1: Student Assessment of Self-Direction Growth, they can refer to that self-assessment at this time to help them select their skill focal area.

- **Consider the self-direciton skills needed for this task.** Students review Table 2: Self-Direction Skills, including all five Self-Direction skills—self-awareness, initiative and ownership, goal setting and planning, engaging and managing, and monitoring and adapting in the rubric. For each skill area, students consider whether that skill area is needed for the task and if it is a skill area that is a strength or an area for improvement.
- **Select a self-direction skill area to focus on.** After completing Table 2, students select one self-direction skill area to focus on during the task.
- **Gather feedback from a peer on your goal and action plan.** Once students have selected their focal area, it is recommended (but not required) that they engage in a peer review protocol to gather feedback from others on their goals and plans. The Action Plan Review Protocol outlines the steps for the peer review.
- **Update your action plan.** After the peer review, students will incorporate the feedback into their action plan and make adjustments if needed *(see Appendix for a blank action plan template)*.

Time Needed: Plan on 25-30 minutes for each student (60 minutes per pair) to complete the Action Plan Review Protocol

Additional Options: Instructional supports can be found at best-future.org.

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STEP 3:

Mid-Task Checkpoint

The mid-task checkpoint is a pause midway through the task or project when students will again engage in a peer review protocol and reflection on their progress in the task. At this time you will want to orient students to the tasks for completing Step 3 (listed below) and ensure that they are clear on when to engage in this step, who they will work with, and any specific expectations for documenting their peer review and any planned changes to their action plan.

- Students will share their action plan progress with a peer reviewer and explore adjustments to their plan. The Mid-Task Checkpoint Review Protocol outlines the steps for the peer review.
- Students will reflect on the peer feedback they received and consider how they might change their action plan. Students will document feedback and planned changes and submit the changes made to the action plan by updating their action plan or using the blank action plan template in Appendix A.

Time Needed: Plan on 25-30 minutes for each student (60 minutes per pair) to complete the Mid-Task Plan Review Protocol

Additional Options: Instructional supports can be found at best-future.org.

STEP 4:

Post-Task Reflection

Ask students to complete Step 4 **only** after they have submitted their task or project. Orient students to the tasks listed below for completing Step 4, then ask students to complete Step 4 independently.

- Refer students to the Self-Direction Reflection Questions. All students should respond to the common questions in Step 4.

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- In addition, students should refer to Table 5.0 to find the specific questions for the self-direction skill they chose as a focus area for their task or project. Students should **only** answer the questions for their selected skill area.
- Students do this final reflection independently (i.e., this step should not be done with a peer or with teacher support).

Additional Options: If students are building a portfolio to showcase their growth in self-direction, teachers will want to provide instructions and guidance to students for how to select and submit evidence to illustrate their growth in their selected skill areas during the project or task.

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grades 6-8

TOOL 2:

Self-Direction Road Map Grades 6-8

My Self-Direction Road Map



STEP 1

Task Goals & Action Plan

Understand the task and learning goals
Make my action plan

STEP 2

Self-Direction Goal & Action Plan Review

Select one self-direction goal for this task
Get input from others and make changes to improve my plan

STEP 3

Mid-Task Checkpoint

Reflect on my progress
Get input from others
Make changes to my plan, if needed

STEP 4

Post-Task Reflection

Reflect on my work and learning
Share evidence of progress, learning, and reflections

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STEP 1 | My Task Goals and Action Plan

Today's Date: Your Name:

Course Name:

1. Briefly describe the task or project you will complete.

2. What is the **learning goal** you have for this task or project?

3. What is your **action plan?**

- ◯ What are the steps you will take to complete this task or project? (Column A)
- ◯ What actions or strategies will you use to accomplish each step? (Column B)
- ◯ What resources will you need for each step? (Column C)
- ◯ What are the target start and end dates for each step? (Column D)

Use the My Action Plan table on the next page. You can add extra steps if you need them.

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TABLE 1.0 | My Action Plan

A Steps I will take to complete this task or project	B Actions or strategies I will use to accomplish each step	C Resources I will need or use for each step	D Target start and end dates I will work on for each step	E Date completed

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STEP 2 | My Self Direction Goal and Plan Review

1. Before you get started, think about which self-direction skills you will need to be successful with your task. For each of the five self-direction skill areas in Table 2 below, indicate with a check mark whether you think each area is:

A) "important" for your task or project, and
B) whether the area is "already a strength," or is an area to "improve."

Important Hint: Look at your ***Tool 1: Student Assessment of Self-Direction Growth*** results to give you ideas!

TABLE 2.0 | Self-Direction Skill Areas

	A	B	
	Important for this task	Already a strength for me	An area for me to improve
Self-Awareness Reflect on past experiences so I can use my strengths and interests and overcome challenges.	◯	◯	◯
Initiative and Ownership Take responsibility for my own learning by asking questions, getting input from others, and shaping the task to better fit my interests and strengths.	◯	◯	◯
Goal Setting and Planning Set task and learning goals and plan out the steps and strategies I will need to be successful.	◯	◯	◯
Engaging and Managing Get the relevant resources and help I need and stay on track with agreed upon deadlines.	◯	◯	◯
Monitoring and Adapting Check my progress and make changes to my plan to better manage my work, improve work quality, or expand my learning.	◯	◯	◯

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2. Select **one** self-direction area that you will focus on during this task. Check your selection from the list below.

   - ○ **Self-awareness**
   - ○ **Initiative and Ownership**
   - ○ **Goal Setting and Planning**
   - ○ **Engaging and Meaning**
   - ○ **Monitoring and Adapting**

3. Now explain your task, self-direction goal, and action plan to someone else to get ideas to make the plan better (see Step 2: Action Plan Review Protocol). You can use this table to take notes and write down the action plan changes you will make.

TABLE 3.0 | **My Action Plan Review**

	Notes from peer review	Changes I will make to my action plan
How I can better manage my work • Meet my target dates, make better progress • Get the resources and help I need • Avoid problems along the way		
How I can improve the quality of my work and learning • Use my strengths and interests • Produce a higher-quality final product • Learn more		

Based on your reflections in Table 3.0, you can make changes on your original plan or make a new one!

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STEP 2 | Action Plan Review Protocol

The steps in the protocol provide an opportunity for a peer review and personal reflection on the progress of your project. The recommended timings are indicated for each step in the process. Use Table 3.0 to record your notes from the meeting.

1 | Present and share with your peer reviewer and explain your task/project, your self-direction goal, and your action plan. (3-5 minutes)

2 | Your reviewer will share the things that they liked about your plan and then ask the questions listed below, and you will respond: (7-10 minutes)

- How will you use your selected self-direction skill area as part of your action plan?
- Are there any steps or strategies you need to add—or remove—from this plan?
- Are there any steps or strategies you need to move around (to do sooner or later than you first thought)?
- Is there any other information, or are there any examples or other resources you will need?

3 | Now it is your turn to ask your peer reviewer for any help or feedback you would like. (5 minutes)

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4 | **Based on this peer review, what changes will you make to your plan to better manage your work? For example: (10 minutes)**

- Can you meet your target dates for each step?
- Do you have the resources you need?
- Can you avoid problems along the way?
- What strategies are working well—and should you keep using?
- Can you improve the quality of your work and learning?
- Can you use your strengths and interests?
- Can you produce a high-quality final product?
- Can you learn more?

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STEP 3 | Mid-Task Checkpoint

1. Review your action plan and think about the progress you have made so far.

   - ***Are things going the way you expected? If not, why not?***
   - ***Have you been able to use your selected self-direction skill area?***

2. Share your progress with your peer reviewer and consider how you might want to change your action plan *(see Step 3: Mid-Task Checkpoint Review Protocol)*. You can use this table to take notes during your peer review, and write down the action plan changes you will make.

TABLE 4.0 | My Mid-Task Checkpoint Review

	Notes from peer review	Changes I will make to my action plan based on peer feedback
How I can better manage my work • Meet my target dates, make better progress • Get the resources and help I need • Solve problems and get help along the way • What strategies are working well—and which I should keep using		
How I can improve the quality of my work and learning • Use my strengths and interests • Produce a higher-quality final product • Learn more		

3. What changes will you make to your plan? You can make changes on your earlier plan or make a new one!

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STEP 3 | Mid-Task Checkpoint Review Protocol

The steps in the protocol provide an opportunity for a peer review and personal reflection on the progress of your project. The recommended timings are indicated for each step in the process. Use Table 4.0 to record your notes from the meeting.

1 | Present and share with your peer reviewer the progress you have made with your task or project. (3-5 minutes)

2 | Your reviewer will ask the following questions and you will respond: (7-10 minutes)

- How are things going so far? What important steps have you already accomplished?
- Have you been able to use your self-direction skills?
- Have you been able to meet the target dates you set for steps? Do you expect to finish on time?
- Have you run into any unexpected problems or challenges?
- What problems or challenges have you faced?
- What might you do differently to overcome or prevent these challenges?
- Have you been able to get the resources or help you needed?
- Is there anything else you still need—or need help with? How will you get the resources or this help?

3 | Now it is your turn to ask your peer reviewer for any help or feedback you would like. (5 minutes)

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4 | **Based on this peer review, what changes will you make to your plan to better manage your work? For example: (10 minutes)**

- Can you meet your target dates for each step and make better progress?
- Can you get the resources and help you need?
- Can you avoid or resolve problems along the way?

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STEP 4 | Post-Task Reflection

Now that you have submitted your performance task, take time to reflect on your experience, your accomplishments, and your learning. ***Feel free to share evidence that shows your learning—and your answers to these questions!***

1. What did you learn from this task or project that you are most excited about? (What is your greatest takeaway?)

2. How did you use your selected self-direction skill area to help you during this task? (Respond to questions for your selected area on the next page.)

3. Overall, did you improve in your selected area of self-direction, did it decline, or stay the same? Why do you think this happened?

4. What examples or evidence can you share to show your growth in self-direction during this task?

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Find and respond ony to the questions for your selected "self-direction" area.

TABLE 5.0 | Self-Direction Skills Reflection

Self-Direction Skill Area	Reflection Questions for Grades 6-8
Self-Awareness	**a)** What is the most important thing you learned about yourself as a learner? • *Your interests and strengths?* • *Areas to improve?* **b)** What did you learn about the strategies that were most helpful? Were any of these strategies you had used in the past? Did you try any new strategies? **c)** What is one problem, mistake, or challenge you had? How did you solve it—or try to solve it?
Initiative and Ownership	**a)** How did you take responsibility for your learning? • *How did you use your strengths and interests?* • *What did you do to find the right resources and get the help you needed?* • *What is one way you got help from others, or cooperated with others?* **b)** What is the most important change you made to your plan or project to improve the quality of your work or expand your own learning?
Goal Setting and Planning	**a)** Are you satisfied (or happy) with the action plan you had? • *Were you able to stay on track with your steps and schedule/timeline?* • *Were you able to find the right resources and get the help you needed?* **b)** Are you satisfied (or happy) with how your task or project turned out? • *Were you able to meet (or exceed) the learning goals for this task or project? If so, how?*
Engaging and Managing	**a)** Think about how you managed your work during this task or project—and what you learned along the way. • *What did you do to stay on track with your steps and schedule/timeline?* • *What did you do to find the right resources and get the help you needed?* • *What is one problem, mistake, or challenge you had? How did you solve it—or try to solve it?* **b)** What is the most important change you made to your plan or strategies to make better progress?

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Self-Direction Skill Area	Reflection Questions for Grades 6-8
Monitoring and Adapting	**a)** Think about how you managed your work during this task or project. • *What did you learn about the strategies that were most helpful?* • *Were any of these strategies you had used in the past?* • *Did you try any new strategies?* **b)** What is the most important change you made to your plan or strategies: • *To make better progress?* • *To improve the quality of your work or expand your own learning?* **c)** If you had the chance to do a task or project like this again, what would you do differently next time?

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APPENDIX A | My Action Plan Template

Steps I will take to complete this task or project	Actions or strategies I will use to accomplish each step	Resources I will need or use for each step	Target start and end dates I will work on for each step	Date completed

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grades 9-12

TOOL 2:

Self Direction Road Map Grades 9-12

Teacher Instructions

My Self-Direction Road Map



STEP 1

Goals & Action Plan

Understand the inquiry questions, the task and learning goals
Make my action plan

STEP 2

Self-Direction Goal & Action Plan Review

Select one self-direction goal for this task
Get input from others and make changes to improve my plan

STEP 3

Mid-Task Checkpoint

Reflect on my progress
Get input from others
Make changes to my plan, if needed

STEP 4

Post-Task Reflection

Reflect on my work and learning
Share evidence of progress, learning, and reflections

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Below, please find teacher instructions to guide your use of Tool 2. These instructions are designed to address the following questions:

Why was Tool 2 developed?

When should teachers and students use Tool 2?

Where, in which courses, should Tool 2 be used?

Who should use Tool 2?

How should teachers and students use Tool 2?

Why



Self-direction is a skill that includes both the intrapersonal skills of self-awareness and reflection, and the interpersonal skills of collaborating with others eliciting feedback and support in the learning process. The Self-Direction Road Map supports and provides evidence for growth in students' self-direction skills such as **Self-Awareness** of their interests and learning goals, **Initiative and Ownership** in establishing their inquiry questions, **Goal Setting and Planning** by creating an action plan, **Engaging and Managing** the flow and efficiency of their work along the way, and **Monitoring and Adapting** their progress through a process that includes peer review and feedback.

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When

The Self-Direction Road Map is designed to be used in conjunction with an assigned project or performance task. The Self-Direction Road Map provides guidance to students as they follow the four steps in the project planning process as illustrated in the Self-Direction Road Map graphic.

Additional Options: Teachers may use this as an instructional tool for a wide variety of purposes throughout the school year. It can also serve as an evidence collection tool for assessment.

Instructional supports can be found at best-future.org.

Where

The Self-Direction Road Map may be used within any content area or course when students are involved in a performance task or project-based learning.

Additional Options: Instructional supports can be found at best-future.org.

Who

Teachers provide initial orientation and guidance to students in using the Self-Direction Road Map. After students demonstrate that they know how to use the tool and review protocols teachers can determine the degrees to which students need ongoing support or could be expected to use the tool independently (see additional options below).

Additional Options: Teachers, especially those with students who have limited experience with self-direction, may want to use the Self-Direction Road Map primarily as an instructional support tool for

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building students' self-direction skills. Alternatively, teachers may want to use the Self-Direction Road Map primarily as a means for collecting the evidence needed to assess student self-direction. In this case, teachers will want to orient students and ensure that they clearly understand its use, but then refrain from offering teacher support as students complete the Self-Direction Road Map independently. In either scenario, it is suggested that students be expected to complete Step 4: Post-Task Reflection questions on their own.

How

Prior to introducing the Self-Direction Road Map, review the self-direction rubric and the *Tool 1: Student Assessment of Self-Direction Growth* with students, allowing them the opportunity to ask clarifying questions. The rubric introduction in the self-direction toolkit provides guidance on introducing the rubric.

Introduce the Self-Direction Road Map to students at the start of the task or project (i.e., when it is first assigned) and walk them through the Self-Direction Road Map graphic to provide an overview of how the tool will be used to document and support their work. Each student should have a copy of the entire Self-Direction Road Map packet, including:

Self-Direction Road Map

Step 1: My Goals & Action Plan

Step 2: My Self-Direction Goal and Plan Review & the Action Plan Review Protocol

Step 3: Mid-Task Check Point & Mid-Task Check Point Review Protocol

Step 4: Post-Task Reflection and Self-Direction Skills Table

Appendix: My Updated Action Plan

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STEP 1:

Task Goals and Action Plan

At this initial step, you will orient students to the tasks for completing Step 1 and ensure that they are clear on the expectations listed below. Students can use either the paper form of the action plan (Table 1) or you may provide students with an electronic copy that can be updated over time.

- Students articulate their learning goals and inquiry questions, taking into consideration their interests that may support their motivation through the task; *e.g., asking themselves what about this learning is important to me.*
- After determining the learning goals and inquiry questions students design their action plan (Table 1), listing the steps they need to complete the task and the strategies they will use to accomplish each step.
    - For example, one step may be to research the topic and find reliable resources—a strategy to achieve that step is to contact the librarian and access the educational research databases.
- Students identify resources for each step, apply a target start and end date.
- Students "check off" the step once it has been completed.

Additional Options: If you are using formative assessment instructional strategies, then the teacher or students could add success criteria to this section.

Instructional supports can be found at best-future.org.

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STEP 2:

Self-Direction Goal and Plan Review

Orient students to the tasks for completing Step 2 and ensure that they are clear on expectations—selecting a self-direction skill to focus on during their task or project. At this step students will review the self-direction rubric and the *Tool 1: Student Assessment of Self-Direction Growth*, and identify the skill that they will focus on in this project. Gathering and responding to feedback is a key aspect of self-direction and is identified in the self-direction rubric. Therefore, the peer review protocol is recommended for all grade levels (but not required). If students completed the Tool 1 Self-Direction Self-Assessment, they can refer to that self-assessment at this time to help them select their skill focal area.

- **Consider the self-direction skills needed for this task.** Students review Table 2: Self-Direction Skills, including all five Self-Direction skills—Self-Awareness, Initiative and Ownership, goal Setting and & Planning, Engaging and & Managing, and Monitoring and & Adapting in the rubric. For each skill area, students consider whether that skill area is needed for the task and if it is a skill area that is a strength or an area for improvement.

- **Select a self-direction skill area to focus on.** After completing Table 2, students select one self-direction skill area to focus on during the task.

- **Gather feedback from a peer on your goals and action plan.** Once students have selected their focal area it is recommended (but not required) that they engage in a peer review protocol to gather feedback from others on their goals and plans. The Action Plan Review Protocol outlines the steps for the peer review.

- **Update your action plan.** After the peer review, students will incorporate the feedback into their action plan and make adjustments if needed (see Appendix for a blank Action Plan template).

Time Needed: Plan on 25-30 minutes for each student (60 minutes per pair) to complete the Action Plan Review Protocol

Additional Options: Instructional supports can be found at best-future.org.

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STEP 3:

Mid-Task Checkpoint

The mid-task checkpoint is a pause midway through the task or project when students will again engage in a peer review protocol and reflection on their progress in the task. At this time you will want to orient students to the tasks for completing Step 3 (listed below) and ensure that they are clear on when to engage in this step, who they will work with, and any specific expectations for documenting their peer review and any planned changes to their Action plan.

- Students will share their action plan progress with a peer reviewer and explore adjustments to their plan. The Mid-Task Check Point Review Protocol outlines the steps for the peer review.
- Students will reflect on the peer feedback they received and consider how they might change their action plan. Students will document feedback and planned changes and submit the changes made to the action plan by updating their action plan or using the blank action plan template in Appendix A.

Time Needed: Plan on 25-30 minutes for each student (60 minutes per pair) to complete the Mid-Task Plan Review Protocol

Additional Options: Instructional supports can be found at best-future.org.

STEP 4:

Post-Task Reflection

Ask students to complete Step 4 **only** after they have submitted their task or project. Orient students to the tasks listed below for completing Step 4, then ask students to complete Step 4 independently.

- Refer students to the Self-Direction Reflection Questions. All students should respond to the common questions in Step 4.

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- In addition, students should refer to Table 5.0 to find the specific questions for the self-direction skill they chose as a focus area for their task or project. Students should **only** answer the questions for their selected skill area.
- Students do this final reflection independently (i.e., this step should not be done with a peer or with teacher support).

Additional Options: If students are building a portfolio to showcase their growth in self-direction, teachers will want to provide instructions and guidance to students for how to select and submit evidence to illustrate their growth in their selected skill areas during the project or task.

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grades 9-12

TOOL 2:

Self Direction Road Map Grades 9-12

My Self-Direction Road Map



STEP 1

Goals & Action Plan

Understand the inquiry questions, the task and learning goals
Make my action plan

STEP 2

Self-Direction Goal & Action Plan Review

Select one self-direction goal for this task
Get input from others and make changes to improve my plan

STEP 3

Mid-Task Checkpoint

Reflect on my progress
Get input from others
Make changes to my plan, if needed

STEP 4

Post-Task Reflection

Reflect on my work and learning
Share evidence of progress, learning, and reflections

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STEP 1 | My Task Goals and Action Plan

Today's Date: Your Name:

Course Name:

1. Briefly describe the task or project you will complete.

2. What is the **learning goal** (or the inquiry questions) you have for this task or project?

3. What is your **action plan?**

- ◯ What are the steps you will take to complete this task or project? (Column A)
- ◯ What actions or strategies will you use to accomplish each step? (Column B)
- ◯ What resources will you need for each step? (Column C)
- ◯ What are the target start and end dates for each step? (Column D)

Add extra steps if you need them.

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TABLE 1.0 | My Action Plan

A Steps I will take to complete this task or project	B Actions or strategies I will use to accomplish each step	C Resources I will need or use for each step	D Target start and end dates I will work on for each step	E Date completed

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STEP 2 | My Self-Direction Goal and Plan Review

1. Before you get started, think about which self-direction skills you will need to be successful with your task. For each of the five self-direction skill areas in the Table 2 below, indicate with a check mark whether you think each area is:

   A) "important" for your task or project, and
   B) whether the area is "already a strength," or is an area to "improve."

   Important Hint: Look at your ***Tool 1: Student Assessment for Self-Direction Growth*** results to give you ideas!

TABLE 2.0 | Self-Direction Skill Areas

	A	B	
	Important for this task	Already a strength for me	An area for me to improve
Self-Awareness Reflect on past experiences so I can use my strengths, limitations, motivations and inter-ests and overcome challenges.	◯	◯	◯
Initiative and Ownership Take responsibility for my own learning by asking questions, getting input from others, and shaping the task to better fit my interests and strengths.	◯	◯	◯
Goal Setting and Planning Set task and learning goals and plan out the steps and strategies I will need to be successful.	◯	◯	◯
Engaging and Managing Get the relevant resources and help I need and stay on track with agreed upon deadlines.	◯	◯	◯
Monitoring and Adapting Check my progress and make changes to my plan to better manage my work, improve work quality, or expand my learning.	◯	◯	◯

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2. Select **one** self-direction skill that you will focus on during this task. Check your selection from the list below.

   - ○ **Self-awareness**
   - ○ **Initiative and Ownership**
   - ○ **Goal Setting and Planning**
   - ○ **Engaging and Meaning**
   - ○ **Monitoring and Adapting**

3. Now explain your task or project, self-direction goal, and action plan to someone else to get ideas to make the plan better. *(see Step 2: Action Plan Review Protocol)*. Use this table to take notes during your peer review and write down the changes you will make.

TABLE 3.0 | **My Action Plan Review**

	Notes from peer review	Changes I will make to my action plan based on peer feedback
How I can better manage my work • Meet my target dates, make better progress • Get the resources and help I need • Avoid problems along the way		
How I can improve the quality of my work and learning • Use my strengths and interests • Produce a higher-quality final product • Learn more		

Based on your reflections in Table 3.0, you can make changes on your original plan or make a new one!

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STEP 2 | Action Plan Review Protocol

The steps in the protocol provide an opportunity for a peer review and personal reflection on the progress of your project. The recommended timings are indicated for each step in the process. Use Table 3.0 to record your notes from the meeting.

1 | Present and share with your peer reviewer and explain your task/project, your self-direction goal, and your action plan. (3-5 minutes)

2 | Your reviewer will share the things that they liked about your plan and then ask the questions listed below, and you will respond: (7-10 minutes)

- How will you use your selected self-direction skill area as part of your action plan?
- Are there any steps or strategies you need to add—or remove—from this plan?
- Are there any steps or strategies you need to move around (to do sooner or later than you first thought)?
- Is there any other information, or are there any examples or other resources you will need?

3 | Now it is your turn to ask your peer reviewer for any help or feedback you would like. (5 minutes)

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4 | **Based on this peer review, what changes will you make to your plan to better manage your work? For example: (10 minutes)**

- Can you identify ways to meet your target dates for each step?
- Can you find the resources you need?
- Can you problems along the way?
- Can you identify which strategies are working well—and should you keep using them?
- Can you improve the quality of your work and learning?
- Can you use your strengths and interests?
- Can you produce a high-quality final product?
- Can you learn more?

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STEP 3 | Mid-Task Checkpoint

1. Review your action plan and think about the progress you have made so far.

   - ***Are things going the way you expected? If not, why not?***
   - ***Have you been able to use your selected self-direction skill area?***

2. Share your progress with your peer reviewer and consider how you might want to change your action plan *(see Step 3 Mid-Task Checkpoint Review Protocol)*. You can use this table to take notes during your peer review, and write down the action plan changes you will make.

TABLE 4.0 | My Mid-Task Checkpoint Review

	Notes from peer review	Changes I will make to my action plan based on peer feedback
How I can better manage my work • Meet my target dates, make better progress • Get the resources and help I need • Avoid problems along the way • What strategies are working well—and which I should keep using		
How I can improve the quality of my work and learning • Use my strengths and interests • Produce a higher-quality final product • Learn more		

3. What changes will you make to your plan? You can make changes on your earlier plan or make a new one!

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STEP 3 | Mid-Task Checkpoint Review Protocol

The steps in the protocol provide an opportunity for a peer review and personal reflection on the progress of your project. The recommended timings are indicated for each step in the process. Use Table 4.0 to record your notes from the meeting.

1 | Present and share with your peer reviewer the progress you have made with your task or project. (3-5 minutes)

2 | Your reviewer will ask the following questions and you will respond: (7-10 minutes)

- How are things going so far? What important steps have you already accomplished?
- Have you been able to use your self-direction skills?
- Have you been able to meet the target dates you set for steps? Do you expect to finish on time?
- Have you run into any unexpected problems or challenges?
- What problems or challenges have you faced?
- What might you do differently to overcome or prevent these challenges?
- Have you been able to get the resources or help you needed?
- Is there anything else you still need—or need help with? How will you get these resources or this help?

3 | Now it is your turn to ask your peer reviewer for any help or feedback you would like. (5 minutes)

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4 | Based on this peer review, what changes will you make to your plan to better manage your work? For example: (10 minutes)

- Can you meet your target dates for each step and make better progress?
- Can you get the resources and help you need?
- Can you avoid or resolve problems along the way?

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STEP 4 | Post-Task Reflection

Now that you have submitted your performance task, take time to reflect on your experience, your accomplishments, and your learning. ***Feel free to share evidence that shows your learning—and your answers to these questions!***

1. What did you learn from this task or project that you are most excited about? (What is your greatest takeaway?)

2. How did you use your selected self-direction skill area to help you during this task? (Respond to questions for your selected skill in Table 5.0.)

3. Overall, did you improve in your selected area of self-direction, did it decline, or stay the same? Why do you think this happened?

4. What examples or evidence can you share to show your growth in self-direction during this task?

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Find and respond only to the questions for your selected "self-direction" area.

TABLE 5.0 | Self-Direction Skills Reflection

Self-Direction Skill Area	Reflection Questions for Grades 9-12
Self-Awareness	**a)** What is the most important thing you learned about yourself as a learner? • *Your interests and strengths?* • *Areas to improve?* **b)** What did you learn about the strategies that were most helpful? Were any of these strategies you had used in the past? Did you try any new strategies? **c)** If you had the chance to do a task or project like this again, what would you do differently next time?
Initiative and Ownership	**a)** How did you take responsibility for your learning? • *How did you use your strengths and interests?* • *What did you do to find the right resources and get the help you needed?* • *What is one way you got help from others, or cooperated with others?* • *How did you make sure you met or exceeded the learning goals for this task or project?* **b)** What is the most important change you made to your plan or project to improve the quality of your work or expand your own learning?
Goal Setting and Planning	**a)** Are you satisfied (or happy) with the action plan you had? • *Were you able to stay on track with your steps and schedule/timeline?* • *Were you able to find the right resources and get the help you needed?* **b)** Are you satisfied (or happy) with how your task or project turned out? • *Were you able to meet (or exceed) the learning goals for this task or project? If so, how?*

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Self-Direction Skill Area	Reflection Questions for Grades 9-12
Engaging and Managing	**a)** Think about how you managed your work during this task or project—and what you learned along the way. • *What did you do to stay on track with your steps and schedule/timeline?* • *What did you do to find the right resources and get the help you needed?* • *What is one problem, mistake, or challenge you had? How did you solve it—or try to solve it?* • *What is one way you cooperated with others on this task or project?* **b)** What is the most important change you made to your plan or strategies: • *To make better progress?* • *To improve the quality of your work or expand your own learning?* **c)** Are you satisfied (or happy) with how your task or project turned out? • *Were you able to meet (or exceed) the learning goals for this task or project? If so, how?* • *If you had the chance to do a task or project like this again, what would you do differently next time?*
Monitoring and Adapting	**a)** Think about how you managed your work during this task or project—and what you learned along the way. • *What did you learn about the strategies that were most helpful? Were any of these strategies you had used in the past? Did you try any new strategies?* • *What is one problem, mistake or challenge you had? How did you solve it—or try to solve it?* **b)** What is the most important change you made to your plan or strategies to make better progress? **c)** Are you satisfied (or happy) with how your task or project turned out? • *Were you able to meet (or exceed) the learning goals for this task or project? If so, how?* • *If you had the chance to do a task or project like this again, what would you do differently next time?*

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APPENDIX A | My Action Plan Template

Steps I will take to complete this task or project	Actions or strategies I will use to accomplish each step	Resources I will need or use for each step	Target start and end dates I will work on for each step	Date completed

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