

PLAN Pilot Initial Implementation Phase Case Study: Oneida-Herkimer-Madison (OHM) BOCES Pathways in Technology Early College High School (P-TECH)

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"That different way [performance-based] of learning — the focus on projects and performance-based assessments, is something that as a P-TECH program we have always valued." – Principal

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Introduction to the study

This case studyⁱ reports on the experiences of district and school leaders, teachers, and staff at the OHM BOCES (Oneida-Herkimer-Madison Board of Cooperative Educational Services) P-TECH (Pathways in Technology Early College High School) program as they engaged in the implementation phase of the Performance-Based Learning and Assessment Networks (PLAN) Pilot program. Interviews and focus groups for this case study were conducted in December, 2024. Research questions informing the PLAN Pilot study are:

1. Under what conditions can performance-based assessment approaches be adapted and implemented in a diverse range of public middle schools, high schools, and districts?
2. In transitioning schools from a test-driven to a performance-driven system of instruction, what support and other factors appear most important to ensure positive student outcomes?
3. What are the transformational shifts (e.g., classroom-based assessments, classroom routines, and instructional practices) made by the pilot schools?
 - a. What are the short- and mid-term outcomes (stakeholder awareness, understanding of and support for PBLA, and changes in professional practices) at the pilot schools?

Each school in the PLAN Pilot is networked with other schools in a focus area to support their performance-based learning and assessment (PBLA) implementation. Each focus area is also supported by a Technical Assistance Center (TAC). The focus areas are: a) Career & Technical Education and Work-Based Learning; b) Inquiry-Based Approaches with Learner Profiles; c) Project-Based Learning and Performance-Based Assessment Tasks. Focus area A is supported by Questar III BOCES, and focus areas B and C are supported by Modern Learners.

OHM BOCES P-TECH is in focus area B.

School Context

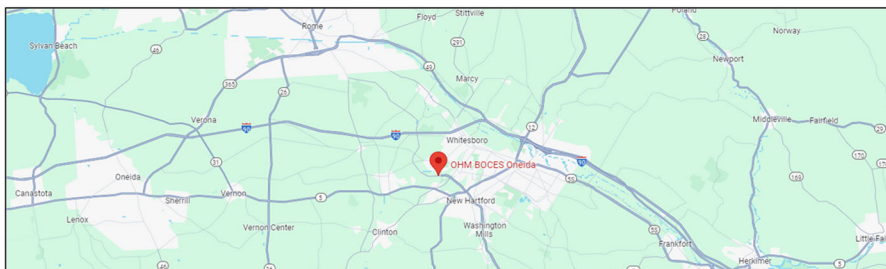
"We have students from all across the board, all different demographics." - Teacher

The OHM BOCES (Oneida-Herkimer-Madison Board of Cooperative Educational Services) is a unique educational institution that serves 12 component districts. The school offers a P-TECH (Pathways in Technology Early College High School) program, which is designed for students who benefit from a more hands-on and innovative approach to education. The program allows students to graduate with both a high school diploma and an associate degree from a local community college. The school emphasizes project-based learning (PBL) and aims to provide a different way of learning that values real-world experiences and performance-based assessments.

Figure 1: OHM P-TECH Description

Geographic Location

The OHM BOCES is located in the Mohawk Valley region of New York State and serves three counties – Oneida, Herkimer, and Madison. The institution serves a diverse range of students from both urban and rural areas, including the Utica City School District and smaller, rural districts like Brookfield.



"Our Mission: We are collaborators, working together and partnering with leaders in education, business, industry, government and the local community to promote inclusive educational and career opportunities and equitable access in order to prepare all of our learners for the dynamic world of today and tomorrow."

"Our Vision: We strive to provide innovative leadership, programs and services in response to the emerging needs of our school districts and learners."

School Building:

Novice Teachers (0-4 years)	School Accountability Support Model	4-Year Graduation Rate
13%	NA	89%

Students:

136	Students of Color	English Language Learners	Students with Disabilities	Economically Disadvantaged
	16%	0	6%	23%

2022-23 School Data.

Excerpt from "Meet the PLAN Pilot Schools":

<https://www.nysed.gov/sites/default/files/programs/plan-pilot/portfolio-meet-the-plan-pilot-schools.pdf>

Community Demographic Description

"We find that we have really, really good kids that just needed a different environment and a different approach to learning." - Principal

The student population at the OHM BOCES is diverse, with students facing various barriers to earning a post-secondary degree. According to OHM BOCES educators, many students deal with factors that could impact their educational success, such as social-emotional issues or the ability to afford college, and some will be the first in their families to graduate from high school or college.

Reasons for Participating in PLAN Pilot

"I think all BOCES are unique and a little different than an actual school district, you know. We serve 12 components. And particularly what we were already doing aligned with the PLAN Pilot is our P-TECH program." – School Administrator

OHM BOCES educators decided to participate in the PLAN Pilot because it aligns well with their vision of innovative, project-based learning. The school sees itself as a leader in the region and believes that the PLAN Pilot will help them fine-tune their existing practices and push further into performance-based learning and assessments. The initiative was seen as a natural fit for their ongoing efforts to provide a different and more effective educational experience for their students.

The next section of this case study highlights findings from data collected in focus groups and interviews with OHM BOCES leaders and educators and PBLA-related documents they shared.

Highlights

PBLA Implementation Challenges

Time and Collaboration Constraints

"The biggest hurdle is time – requires a lot of collaboration – creating time for staff in a smaller school is a challenge." - Principal

One of the significant challenges faced by the OHM BOCES in implementing PBLA is the lack of time and the need for extensive collaboration among teachers. The process requires careful planning and coordination, which is difficult to achieve within the constraints of a typical school schedule. Teachers need dedicated time for professional development and collaboration, which is often hard to find. As one school administrator explained, "Finding that time to really dig in with teachers is tough because a half hour at the end of the day during a faculty meeting is not going to meet their needs."

Teacher Preparedness and Professional Development

"Some students are getting prepared for Regents and some not for Regents. For teachers who know where they need to go with Regents – they have comfort, but for others it is ambiguous now." – School Leader

Another challenge is the varying levels of experience and preparedness among teachers. Newer teachers, especially those in transitional educator prep programs, can lack the necessary training and

experience to implement PBLA effectively. There is also a need for ongoing professional development to ensure that all teachers understand and can apply high-quality PBLA consistently.

Developing Reliable and Valid Rubrics

"We need to have some really, really good rubrics. We need to have standards and just make sure that this is being done with fidelity." - Principal

Ensuring equity and consistency in grading is a major concern in the P-TECH program. Educators at the OHM BOCES emphasized that teachers need to develop and use performance-based rubrics that are reliable and valid across different content areas. This requires a deep understanding of the standards and how to apply them to assessment in a way that is fair and consistent for all students. A key question the principal raised is, "How do we get those two instructors with two different sets of standards scoring the students in a way that's consistent, reliable, and valid?"

Fear of the Unknown and Resistance to Change

"It's really scary, especially for teachers, because there's just so many unknowns." - Principal

A concern raised by all participating in interviews and the focus group was the transition to PBLA being met with resistance from some teachers, particularly those who are accustomed to traditional methods of assessment and whose instruction has been aligned to Regents exams for many years. The uncertainty and fear of the unknown can create pushback, making it challenging to implement new practices effectively. A school leader empathized with her teacher colleagues, saying, "The idea of not giving a kid a grade on a hundred-point scale or a letter grade is extremely scary."

PBLA Implementation Supports

Professional Development

The OHM BOCES P-TECH program places a strong emphasis on professional development to support the implementation of PBLA. They have scheduled various professional development sessions focused on understanding PBLA, developing rubrics, and equitable grading practices. These sessions aim to help teachers gradually transition to PBLA and feel more comfortable with the new instructional shifts. As one administrator explained, part of this work involves defining PBLA: "We're looking at professional development coming up here in January simply around, you know, what is performance-based learning? What does it look like for teachers? How do you do it?"

Collaborative Planning

Leaders have helped by offering shared planning time and regular team meetings to facilitate collaboration among teachers in planning interdisciplinary units using PBLA. They also organize days where the regular schedule is set aside for professional development and collaboration. As the principal explained, offering time for teachers to collaborate is one of the most important things for teachers: "If we're giving them time to collaborate, that seems to be what they appreciate the most."

Leveraging External Partnerships

OHM BOCES P-TECH has established strong relationships with industry partners and the community to enhance their PBLA offerings. These partnerships provide students with real-world challenges and opportunities to apply their learning in practical contexts. For example, students work on projects with local companies, such as designing solutions for industry-specific problems. A teacher explained, "We work a lot with our industry partners to do authentic challenges." She continued, "We have a lot of industry partner involvement. So I think it's almost a little easier for us to... make it [learning] more authentic by either bringing in someone from the community or bringing in someone from our industry partners."

Technical Assistance Centers and Mentor Schools

Staff members acknowledged the importance of engaging with Technical Assistance Centers (TACs) and mentor schools to gain insights and support for PBLA implementation. Interviewees also looked forward to collaborating with a mentor school to learn from their experiences and avoid reinventing the wheel. As one school leader explained, "I think a mentor school is going to be huge. I think getting out and talking to people who have done this and are able to say, this works, this doesn't work."

Development of Rubrics and Assessment Tools

Creating well-crafted rubrics and assessment tools is a key focus for P-TECH educators and seen as a facilitator in shifting both instruction and assessment. They recognize the need for consistent and reliable assessment methods and tools that align with the Portrait of a Graduate and PBLA. Professional development sessions are planned to help teachers develop these methods and tools and ensure they are used effectively across classrooms and content areas. A teacher attested to their "work in progress" status on this: "I think one of the things that we're still working on is the importance of creating well-crafted rubrics to assess."

Utilizing Technology and Shared Resources

"The librarian is going to come in and train these 10 students who I'm working with to actually create the webpage and the landing page for the software." - Teacher

The school leverages technology and shared resources to support PBLA implementation. For example, they have integrated library software to provide students with hands-on experience in managing and operating a library. This approach not only supports PBLA but also helps students develop valuable life skills – including critical thinking and leadership.

PBLA Adaptations and Promising Practices

Equity and Grading Practices Across Subjects

"I'd like to see equitable grading practices. I would love to see integration of content and subject areas so that students aren't learning social studies and math in silos." – School Leader

One adaptation in focus in the OHM BOCES P-TECH program is ensuring equity in grading practices. This involves developing a deep understanding of the standards and how to apply project-based assessment

of them consistently across different subjects. Teachers are encouraged to do this work across subject areas, and as one school leader admitted—this is no small task: "There really has to be an in-depth understanding of what those standards mean and what they mean at that grade level."

Innovative Capstone Projects and Authentic Learning Opportunities

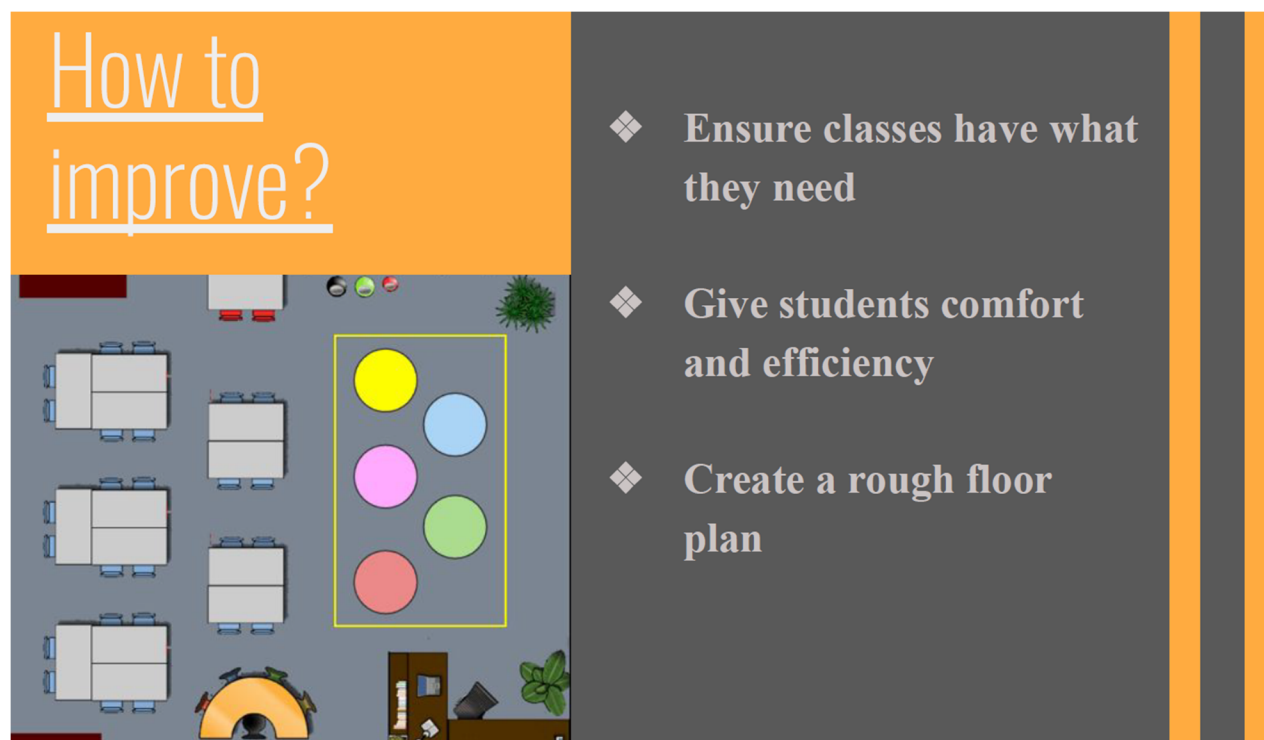
"I do like a big capstone project ... where they [students] have to identify a problem. They work through the whole process, then present their findings." - Teacher

One of the standout practices is the use of project-based capstone projects. One example in the OHM BOCES P-TECH program is the Martian Project (see Figure 2 below), where students read the novel *The Martian* in their English class and integrate scientific concepts from their science classes. This project also includes components from social studies, where students create their own governing system. Another example raised by teachers was a capstone project where students were asked to design a new space within their school (see Figure 3). This interdisciplinary approach helps students see the connections between different subjects and apply their learning in a meaningful way.

Figure 2: A slide of students' Martian Project



Figure 3: A slide from students' project to redesign school space



Co-Teaching and Integration of Subjects

"The teachers that I've talked to so far are already doing the co-teaching, the integration of the subjects, and they love it." – School Leader

The program has adopted a co-teaching model to support interdisciplinary work. This approach invites teachers to collaborate and support each other, with the goal of creating a more cohesive learning experience for students. Capstone projects, as demonstrated above, are a useful way to integrate multiple subjects and provide students with authentic learning experiences. A school leader explained, "With a capstone project, ideally, you have every single subject integrated." Educators commented positively on the potential for these assignments to promote cross-disciplinary collaboration.

Use of AI and Technology

Teachers are also embracing technology and AI to enhance learning. Teachers are introducing students to responsibly and ethically using AI to assist with projects. This includes using chatbots for research and feedback, which they argue helps students develop skills that are increasingly important in the modern world.

Summary and Conclusions

Early Outcomes of PLAN Pilot Participation

Need for Attention to Teacher Preparedness

"We have staff members who lack experience with PBLA, are new to education or part of educator transition programs. So they were in a different career, and they're kind of fast tracking to teaching and their level of preparedness can vary." – School Leader

The implementation of PBLA at OHM BOCES P-TECH highlights the need for ongoing professional development and support for teachers. Teachers have expressed the importance of having well-crafted rubrics and standards to ensure consistency and fidelity in assessments. There is also a recognition that newer teachers, especially those in transition programs, require additional support and training to be effective in this new approach.

Need for Attention to Student Preparedness

"Middle school is so important that this gets rolled out appropriately, and that kids are comfortable with performance-based learning." – School Leader

Another outcome observed in the early PBLA implementation work in the P-TECH program is the varying levels of student preparedness for the independence and critical thinking required in shifting to PBLA. Teachers have noted that students often struggle with the transition to performance-based learning, particularly in developing awareness of their agency and a growth mindset. This underscores the importance of introducing opportunities to raise awareness and develop these early, ideally in middle school, to better prepare students for high school and beyond.

Need for Structured Guidance and Resources

"As the state figures out more and has more guidelines just getting that information as soon as we can [is important]." – Teacher

Teachers have recommended the development of a playbook or guide to provide structured guidance on implementing PBLA. This would help standardize practices and ensure that all teachers have access to the same resources and information. Additionally, they noted a need for more timely and detailed guidelines from the state to help schools navigate the transition to PBLA and especially within the context of frameworks like the Portrait of a Graduate.

Need for Collaboration and Professional Learning Time

"Putting together a whole PBLA unit, especially for a teacher [who] hasn't done [it] before, takes a lot of time if you want to do it the right way." - Teacher

Time remains a significant challenge for teachers implementing PBLA. There is a need to rework schedules to allow for more collaboration and professional development time. Teachers have suggested finding ways to adjust the school schedule to better accommodate these needs, in light of constraints such as district bus schedules and limited after-school time.

Future Directions

To address the challenges identified, the OHM BOCES P-TECH school plans to enhance professional development opportunities for teachers. This includes training on creating effective rubrics, understanding PBLA in light of standards, and developing consistently equitable assessment practices. By providing targeted professional development, the school aims to build teacher capacity and confidence in implementing PBLA.

Conclusion

“I also think that it's important that our students are aware of the process as we're shifting... Maybe I gave you [a student] this rubric up front and we learned more about it.... You know, we [teachers] are human. We learn. We grow.... So, just having them [students] be in the know and know that it's kind of a living thing as we transition”. - Teacher

OHM BOCES-PTECH is committed to implementing PBLA through enhanced professional development — especially around rubric design rooted in equitable project-based assessment principles, and through the provision of structured guidance to its staff by its more expert educators and from external partnerships. One implication from the data collected is the importance of statewide efforts to focus on early-career and transitioning educators’ preparation for PBLA as well as providing the necessary support for more veteran teachers in making transformational shifts in new teaching and assessment practices. Perhaps as important is the inclusion of students in understanding PBLA shifts and being invited into co-design as the above quote expresses.

An unexpected finding from this case study relates to the importance leaders and teachers see in articulating alignment between state policies and frameworks (e.g., Portrait of a Graduate) and PBLA implementation. Likewise, educators will benefit from more clarity and specific examples of PBLA so that reversion to past practices do not occur.

In sum, OHM BOCES P-TECH serves a diverse student population with varying needs and abilities and is rooted in a culture that invites adaptation of learning and assessment—making it a conducive environment for PBLA transformational shifts. OHM BOCES P-TECH is already making significant adaptations to implement PBLA, focusing on equity in grading, integrating PBLA across content areas, and expanding authentic learning experiences. Through innovative projects, the use of technology, and strong community partnerships, the program is creating a dynamic and supportive PBLA learning environment.

Recommended citation: Wilcox, K. C., Leo, A., & Durand, F. (2025, March 20). *PLAN Pilot Initial Implementation Phase Case Study*. OHM BOCES- P-TECH.

ⁱ This case study is one of a series of qualitative case studies conducted by the PLAN Pilot research team. Since the PLAN Program is designed around building understanding of what’s needed to change the paradigm of teaching and learning in New York State, these case studies are crafted to help New York explore the conditions and supports schools and educators need to shift instructional practices. The PLAN Program’s goals include: 1. Establishing a field-informed set of recommendations for transitioning to a statewide assessment strategy that

incorporates multiple measures of student learning, with a focus on PBLA. These recommendations will: (a) address key principles of equity, transparency, validity, and reliability; (b) identify key supports and conditions for schools to transition to assessment systems that use multiple measures; and (c) present possible solutions for addressing barriers to implementation at the school, district, and state level; 2. Establishing field-informed road maps for transitioning to PBLA that support schools and districts to shift to a multiple measures system built around a culture of PBLA. These road maps will be developed from the experiences of the PLAN Pilot Schools and will focus on the shifts schools and districts need to make in order for PBLA to be successfully implemented. These materials are envisioned to provide information and guidance ranging from assessment design and development to curriculum and instruction, family/caregiver engagement and communication, professional development and support, and budgeting and resource allocation.