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Study of the Engage New England Initiative Cross-Site Learning Brief 4

Early Insights from Academic Case Conferencing

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Introduction

In 2017, the Barr Foundation launched Engage New England (ENE), an initiative that provides local education agencies and nonprofit organizations a unique opportunity to plan for and develop innovative schools to serve students who are off track to graduate from high school. School design partner, Springpoint, has guided three cohorts of ENE grantees through a year-long design process and is providing continued support for the development of the new or redesigned schools. In 2020–21, Springpoint supported 12 grantees, 11 with operating schools and 1 designing a new school.

The ENE initiative's theory of action is centered on the idea that designing schools around the tenets of Positive Youth Development (PYD) will create learning environments that offer all students the opportunity to thrive (Springpoint, 2018). Springpoint recommended all ENE schools implement a primary personal model, a key system grounded in PYD. In this model, each student has one adult they trust whom they can consistently go to for academic and social-emotional support.

In summer 2020, Springpoint introduced academic case conferencing as one of the core functions of a primary person. With academic case conferencing, primary people help students maintain academic progress through consistent one-on-one meetings focused on intentional goal setting. This support was particularly critical with the ongoing COVID-19

Positive Youth Development

The initiative relies on PYD as the foundation for school design, described in Springpoint's *How Students Thrive: Positive Youth Development in Practice*. It identifies five key tenets of PYD:

- Caring, trusting, and supportive relationships
- High expectations
- Voice, choice, and contributions
- Engaging learning experiences
- Consistency

Early Insights from Academic Case Conferencing

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pandemic, when students spent a significant proportion of the 2020–21 school year, or in some cases all year, learning remotely. Without the daily interactions afforded by in-person learning, it was more important than ever that students had an adult with whom they met regularly to check in and discuss their progress.

SRI Education, research partner for the ENE initiative, captured the schools' experiences with academic case conferencing through interviews of school leaders and staff members, student focus groups, staff surveys, and a pilot of academic case conferencing observations. This brief describes the approaches schools used to support academic case conferencing and their implementation of key practices.

Impact of COVID-19

Like schools across the country, the grantees had to figure out how to teach students in a safe and effective way during the pandemic. All school buildings closed for a period of time during the 2020–21 school year, requiring full-time, virtual teaching and learning, and then reopened with modified hybrid schedules. Teachers had to learn new online teaching software and formats, and in some cases teach students in-person and online simultaneously. Moreover, COVID exposure occasionally forced teachers, students, or whole classrooms to quarantine for up to two weeks.

Along with instructional challenges, school staff had to deal with the mental and social-emotional toll of the pandemic on their students and themselves. Many of the communities served by ENE schools were among those hit hardest by the pandemic. The pandemic exacerbated existing challenges and added new obstacles for students, such as food or housing insecurity, the need to work while attending school, family and child care responsibilities, mental health challenges, and technology or internet access barriers. Schools struggled to maintain attendance and engagement during the pandemic, though some students were more engaged in a remote learning environment. Furthermore, school leaders had to focus their time and attention on COVID safety measures, managing shifting school schedules, making sure students had the opportunity and resources to learn, and meeting students' mental health needs.

The pandemic underscored the critical need for schools to have systems that ensure every student has support from a caring adult. The extremely challenging environment under which ENE schools introduced academic case conferencing presented more obstacles than likely would be present in a typical school year. As such, the experiences of ENE schools can help inform schools seeking to institute similar systematic student supports under less severe circumstances.

Engage New England: Doing High School Differently

In 2017, the Barr Foundation launched Engage New England (ENE), an initiative intended to support the design and implementation of excellent high school options for students who are off track to graduate from high school. With planning and implementation support, grantees develop innovative models for either new or redesigned schools to build the skills and competencies students need to be successful in and after high school. Each new or redesigned school is expected to anchor core instructional practices and student support structures in positive youth development (PYD). PYD is a fundamental component undergirding Springpoint's Indicators of School Quality, the framework guiding its supports to schools. The initiative's goal is to empower students to take ownership of their path to graduation and a postsecondary plan by developing rigorous and relevant learning experiences and effective and transparent academic systems, such as competency-based learning and academic case conferencing.

Barr invested in three cohorts of grantees across New England, with the first cohort funded in 2017–18. A total of 18 grantees across three cohorts received planning grants, and by 2020–21, 12 continued with ongoing support for the additional planning, piloting, or launching of the new or redesigned schools.

Each grantee receives technical assistance from Springpoint, a national organization that supports innovative school model design and implementation. Springpoint provides grantees with customized supports, including individual coaching and research visits, network-wide convenings and master classes on topics essential in developing strong school models, and study tours of exemplary school models. Springpoint's planning year supports began with an emphasis on whole-school design and came to deeply focus on helping grantees develop a strong instructional core, an intensive advisory model, and a competency-based learning system, three primary needs identified across all cohorts.

SRI Education is conducting a rigorous, multimethod evaluation of the initiative, beginning with grantees' planning year and continuing through implementation. The evaluation includes interviews with school and district staff and external partners, student focus groups, staff and student surveys, and an analysis of students' high school and early postsecondary outcomes.

Components of Academic Case Conferencing

Springpoint's model of academic case conferencing, described in detail in _Supporting Every Student: Academic Case Conferencing_, is "a structured approach to student support that focuses on guiding students to set and achieve academic goals and become independent learners" (Springpoint, 2021, p. 5). Using a data-driven approach, primary people use academic case conferencing to build students' self-direction and ownership of their learning and support students in completing academic work, passing classes, and graduating from high school. The academic case conferencing model includes several key components:

- **One-on-one meetings:** Each student meets with their primary person in regular one-on-one case conferencing meetings to discuss academic progress. Each primary person has a caseload of students, ideally 18 or fewer. Springpoint developed a protocol to guide these meetings and foster student agency.

- **Support system:** A designated primary person manager, typically a student-support staff person, oversees the case conferencing work, trains primary people, provides the support and feedback, and monitors data on case conferencing in the school. Springpoint offered a triweekly working group to build primary person managers' skills in leading academic case conferencing.

- **Goal setting and review:** During a case conference, the student and primary person set SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) goals and identify clear and concrete strategies to meet those goals. At the following meeting, the student and their primary person review the previously set goals and strategies and examine why they were or were not met. Students are expected to come to each meeting having prepared and reflected on their progress toward goals from the previous week.

- **Differentiation:** Primary people are expected to differentiate meetings—in focus and meeting length— for each student on their caseload based on individual needs. Springpoint developed a student matrix as a tool to guide differentiation by placing students in different quadrants based on student engagement and success in school. This matrix was introduced shortly before the study's data collection and was not yet in wide use at the time of the interviews.

Ideally, meeting discussions are narrowly focused and concrete, and the primary person has a warm and demanding relationship with the student (Hammond, 2015). Through iterative meetings, the conferencing process aims to catalyze a cycle of progress, success, and growth towards students' long-term goals.

In 2020–21, schools were just starting to experiment with academic case conferencing as part of their primary person models. Some schools piloted case conferencing with a small group of primary people and students to refine the components before introducing the approach schoolwide, while others implemented case conferencing with all students. Schools had varying approaches to structuring and managing the primary person role and case conferencing due to differing student populations and needs, staff capacity, and school missions and models. This section describes the benefits and drawbacks schools encountered with these varied approaches.

Staffing the Primary Person Role

Schools used various configurations of staff to serve as primary people. Across the grantees, primary people included: (1) teachers only, (2) non-teaching staff only, and (3) a combination of teaching and non-teaching staff; in some cases the entire staff.

- **Teachers only.** Schools chose to enlist teachers as primary people for several reasons. In small schools, teachers were the only staff available. More generally, teachers had preexisting relationships with students through their work in the classroom and could readily support students in creating academic goals. At the same time, teachers already had many responsibilities, and adding the primary person role sometimes led to teachers feeling overworked. One school needed to alter its school schedule to better balance the teacher time used for electives and their primary person caseloads.

Designing a Tiered System of Supports

One site designed a case conferencing system that incorporated an explicit focus on both academic and social-emotional learning needs. A group of staff, including school leaders, a case manager, and two social workers, oversaw the system and brought varied expertise to inform the supports. This site assigned students to three separate studios and used those groupings for organizing case conferencing. Each studio had a case manager, four teachers, and about 50 students. The case managers were certified in special education, as nearly half of the school's student population receive special education supports.

The plan was for case managers to connect students with resources to make sure their mental and physical needs were met and to support teachers in conducting academic case conferencing. The case manager and teachers engaged in regular, recurring meetings, led by the two social workers, to discuss their students and ensure they addressed both academic and nonacademic barriers to each student's success. This model has the potential to enable teachers to focus on academic case conferencing knowing that their students' broader needs are being addressed by the case managers.

- **Non-teaching staff only.** Designating support staff, rather than teachers, as primary people avoided adding to teachers' responsibilities and enabled schools to tap into the specialized expertise of student support staff. However, support staff sometimes struggled to help students create and monitor progress toward academic goals or students were less inclined to discuss academics with them. In one case, a grantee found that students were more likely to seek support from designated support staff, rather than teachers, but they were less likely to want to discuss schoolwork. Moreover, these schools only had a small number of staff whose role was solely focused on supporting students (e.g., guidance counselors), which often led to large caseloads, some at 60+ students, and inhibited primary people's ability to meet with all of their students. Survey results showed that staff at these schools had high caseloads and were among the least likely to report meeting with every student on their caseload.

- **A combination of teaching and non-teaching staff.** Some schools thought creatively about how to expand their advising capacity and used a combination of staff as primary people to reduce the burden on any one role and to reduce the size of advising caseloads. Staff ranged from school counselors, social workers, interns, volunteers, field coordinators, school leads, alumni, and custodians. Using all staff to serve as primary people, especially at small schools, lowered the caseloads and enabled primary people to meet with all students on their caseloads. At the same time, this approach could introduce unevenness in terms of primary persons' experience, expertise, and skill in working with students, which may necessitate more tailored professional development.

When staffing the primary person role, schools should consider the existing capacity of their staff, including time and expertise. Schools can try to mitigate overburdening staff with this additional role by protecting time for academic case conferencing in staff's schedules, helping them differentiate the length of meetings based on student needs (see Scheduling Case Conference Meetings), and encouraging the use of simple protocols and aligned data systems to streamline meetings (see Developing Tracking Systems). Schools may also consider which staff roles may be better suited to meeting students' needs—for example, student support staff may be well-positioned to work with students who are not yet engaged, while teachers may have the needed expertise to work with engaged students who are not yet succeeding in academics.

Photo: CREC Impact Academy

Assigning Caseloads

How students are assigned to primary people is critical for ensuring a good match between the student and primary person so that each pair forms a strong relationship. Schools considered different factors when assigning students to caseloads, including established groupings, specific student needs, and preexisting relationships.

- **Established groupings.** Some grantees embedded academic case conferencing into preexisting crews or advisories, oftentimes assigning one primary person to a crew or splitting a larger crew in half so each primary person had around 8–15 students on their caseloads. Crew or advisory assignments were often made with a primary person-student match in mind. For example, one site with a large multilingual student population organized its students into crews based on language proficiency and assigned primary people based on these groups.

- **Individual student needs.** One small school assigned students to primary people on a case-by-case basis, which allowed for more intentional alignment to individual students' needs. For example, this site assigned seniors to primary people with knowledge of the college application process. Another site had all primary people meet in a group to individually assign students to caseloads: "We sat in a circle in September and literally just passed around the printouts of the students' academic performance, where they were." This approach, however, may be difficult in a larger school.

- **Preexisting relationships.** A few sites based caseloads on personal connections and relationships between staff and students, which ensured that primary people and the students were a good match and could spend less time building rapport. A caution with this approach is that the established relationships could supersede the case conference work without strong staff training and clear expectations for case conferencing. For instance, a teacher was paired with a student because of their tight bond that was based on shared interests in video games. The meetings often ran long and focused less on case conferencing work and more on their common hobbies.

These assignment strategies emphasized finding a good match, so students want to attend the meetings and engage with their primary person. In determining their groupings, Springpoint suggests that schools make sure primary people have a mix of students on their caseloads with a range of needs. This heterogeneity enables primary people to strategically differentiate the supports they provide and maximize time spent engaging in case conferencing. For example, primary people may meet more frequently for longer amounts of time with students who are not yet engaging and not yet succeeding and less frequently for shorter amounts of time with students who are highly engaged and having success in school.

Scheduling Case Conferencing Meetings

A key feature of academic case conferencing is holding brief, regular meetings. Springpoint recommends these meetings last no more than 15 minutes so they are efficient and purposeful, primary people are able to meet with all students on their caseloads, and students are motivated to attend. The student differentiation matrix is intended to help primary people customize the cadence and length of the meeting times depending on students' level of engagement and success, with more frequent meetings for students who are not yet achieving academic success (Springpoint, 2021).

Primary people found that quick check-ins were sufficient when they were able to meet with a student frequently. They reported needing more time if they did not meet with the student often or if the student needed additional support with logistical (e.g., organizing their schedule) or personal needs. Schools that relied on preexisting structures for organizing case conferencing, such as advisory or crew, often used that time to conduct the individual meetings, which facilitated consistency in scheduling and student attendance. Other sites asked primary people to set weekly or biweekly standing meeting times with individual students based on students' schedules. While this approach allowed for flexibility, it also made it easier for meetings to fall off schedule, resulting in variations in meeting frequency within caseloads.

Building Primary Person Capacity

Most primary people did not have previous experience supporting students with academic case conferencing. Moreover, they came with different expertise, either as a teacher or other support staff roles. As a result, professional development and ongoing support for primary people were paramount for ensuring consistent quality. A critical role of the primary person manager was to guide and build the capacity of primary people to engage in that practice. Primary person managers employed various approaches to supporting primary people, including:

- **Developing a small number of focal primary people.** In the first year, Springpoint guided each primary person manager to identify one staff member (a focal primary person) to coach intensively. The primary person managers observed the focal primary persons' case conferencing sessions with one to three students who showed up regularly for case conferencing. The primary person managers provided feedback, often weekly, to help primary people identify growth areas and targeted strategies. This approach was intended to create exemplar primary people to show other staff what is possible and to allow primary person managers to hone their skills before expanding to support more staff. Schools were too early in implementation at the time of data collection to detect if these intentions were met.

- **Providing professional development for the full advising staff.** At the outset of the school year, some primary person managers used Springpoint's master class materials to provide professional development for their staff related to case conferencing. One primary person manager adapted the lessons from Springpoint and created professional development sessions specific to their school context. For example, the primary person manager asked primary people to role-play working with different types of students, such as students who never come to school and those who come every day. Another site intended to focus periodic staff meetings on case conferencing to follow up on an introductory professional development session, but other priorities regularly took precedence. These contrasting experiences suggest the importance of designated professional development time for case conferencing to ensure this work occurs amongst busy schedules and competing priorities.

- **Holding office hours for primary people.** Office hours allowed primary person managers to work with primary people to improve and differentiate their practice based on student needs. However, participation in voluntary office hours may be limited to primary persons who are particularly motivated or who have time. At one site, the primary person manager offered voluntary office hours in which primary people could discuss general struggles, such as engaging students, or specific student cases. The primary person manager started mandating monthly meetings with her because primary people were not attending the voluntary office hours even when data showed their students were not progressing.

Primary person manager capacity is an important determining factor for the type of supports they can provide to primary people. Primary person managers who were support staff, as opposed to school leaders or teachers, often had more opportunities to offer ongoing supports. Leaders acting as primary person managers had limited capacity and were more likely to provide one-off professional development than embedded coaching.

Developing Tracking Systems

A well-developed tracking system serves two purposes: (1) improving the quality and efficiency of case conferencing meetings by providing information to primary people and students on students' progress toward their goals, and (2) facilitating the primary person manager's ability to monitor the academic case conferencing system by tracking metrics, such as frequency, length, and content of meetings. Ideally, one tracking system houses all of the elements necessary to fulfill both purposes and is accessible to both primary people and students. Some ENE schools were able to adopt new or adapt existing schoolwide information systems to support and monitor academic case conferencing, while those that could not change systems left it to individual primary people to devise their own methods for acquiring the necessary data.

A few sites were able to provide primary people and students access to current data about student progress—including grades, attendance, and student work completion—through school-wide student information data systems. Ready access to these data enabled primary people and students to monitor student progress, devise appropriate goals grounded in the data, and hold students accountable for meeting those goals. A primary person manager said, "...We can see whether a student is making a lot of progress or if they are falling off… So, having the biweekly conferences and all that data [from the tracking system] allows us to really hold the student accountable and praise the student at the same time."

Primary people and students could document their meetings in these systems with information such as academic and personal goals, action steps to achieve each goal, and progress toward goals, providing a tool to track progress from meeting to meeting. For example, at one site, for each case conferencing meeting the primary people downloaded a blank case conferencing template, sent it to their students ahead of time, completed it together during the meeting, and uploaded the document URL to the data tracking system after the meeting. This documentation could facilitate larger conversations about the types of supports students might need. A primary person manager explained how the school's tracking system was a helpful tool to implement targeted interventions:

In that daily tracker, we also can see that they attend class, not only did the meet their goal but did they attend class, did they turn in work, did they sign into Google classrooms. …Being able to have a really diligent [team] that's regularly looking at this [data] and finding creative ways to intervene when a student isn't engaging has also been really successful…I think we only have about 10 students that haven't engaged at all with us since the beginning of the year…

Having a single source of data about the case conferencing meetings and student progress also enabled primary person managers to monitor the primary person system. In some sites, primary person managers used the tracking system to ensure academic case conferencing meetings were taking place and meeting documents were completed, follow up on questions or concerns, and identify areas in which primary people needed additional support or professional development.

Tracking Data for Case Conferencing

Data for tracking students' academic progress:

- School and class attendance
- Assignment completion
- Course completion
- Credit attainment
- Mastery of skills and/or GPA

Data for monitoring case conferencing meetings:

- Meeting dates and times
- Goals and action steps
- Whether goals were met
- Facilitators and barriers to meeting goals

Primary people at schools that did not have the database infrastructure or capacity to support a single tracking system had to devote time to tracking down information about the students on their caseloads. Primary people reported seeking data from multiple, disparate sources. For instance, a primary person described navigating several sources weekly to obtain data for each case conference, including the school's attendance system and grading system, and texting individual teachers to receive current information on the student's progress. When primary people and students did not have an easily accessible data source, they rarely reviewed previous goals or meeting notes and had to spend time during the meetings to refresh themselves on what they previously discussed. Further, without a centralized data source, primary person managers struggled to monitor case conferencing for individual pairs and across the school.

Photo: MAP Academy

Ideally, through academic case conferencing, primary people help students build self-direction and ownership over their learning and set actionable and attainable goals so they succeed in and beyond high school. Primary people generally focused on building strong relationships with their students as a necessary foundation before they could turn to deeper shifts in students' ownership over their academic progress. Primary people found that developing student agency, particularly around goal setting, will take time.

Building Strong Relationships

In the ENE schools' experience, a key first step for successful case conferencing meetings was establishing strong relationships between primary people and students, as these relationships facilitated greater student engagement and attendance at the meetings. Intentional caseload assignments was one strategy schools used to leverage existing staff-student connections, which were historically strong at these schools (Cassidy et al., 2019). Within the case conferencing meetings, primary people reported strategically focusing on relationship building and social-emotional check-ins before focusing on academics to keep students coming to and invested in the meetings. A primary person explained his approach:

> *I think they're deciding to show up because there's an adult who's warm with them.*
>
> —Primary Person

> ...The only way I'm going to get them to [want to come to case conferencing meetings] is if I make them feel better when they leave than when they came in...And to me, that's what being connected to students requires. …It's like kids want to show up because it feels good to do so…and there's an amount of that accountability and pushing and getting them to do more than they thought, that also feels good. But I don't think that can come until that foundational relationship that works happens. …I don't know if kids are showing up for an academic case conference. I think they're deciding to show up because there's an adult who's warm with them.

A student reported appreciating that her primary person tried to build that connection first: "They want to get to know you before you talk to them at all, so it's not like you're just like talking to a stranger, you get to know them so you feel more comfortable, and they make sure you're comfortable sharing stuff with them..." These relationships can be strengthened and maintained over time with regular and frequent meetings, which was particularly critical during the pandemic, as one primary person noted: "I love [case conferencing] ... I think this is the best thing I've seen. It's been really helpful, and I think it's made it possible to have continued connections with students."

Developing Student Agency

A primary goal of academic case conferencing is for students to develop the metacognitive and executive functioning skills to take initiative and ownership over their learning. These skills are particularly critical for students who are off track to graduate from high school. Students show agency by coming prepared to the meetings and leading more of the discussion and goal-setting process. The case conferencing protocol is intended to minimize adult talk and allow time for students to think, speak, and reflect on their progress. Interviews and observations indicated that few students had yet developed agency and ownership over the case conference meetings.

In the early stages of implementation, case conferencing meetings were still predominantly driven by the primary people. Students were rarely expected to do any kind of pre-work to prepare for the meetings, and primary people did much of the talking and cognitive lift during meetings. Primary people reported not adhering faithfully to the protocol, feeling it was too formulaic and inauthentic to do so.

The lack of student ownership was most acute in the goal-setting process. Students needed support to understand the purpose and benefits of setting SMART goals and how to write goals that were specific enough, had concrete next steps, and were appropriately

Building Students' Goal Setting Skills

One site embedded case conferencing into an advisory-like daily class of 8–10 students that combined goal setting, social-emotional learning (SEL) lessons, and team-building activities. On Mondays, students independently reflected on their grades and identified one academic and one personal goal for the week and an action step to help them accomplish each goal. Because students often set the same goals (such as improving their grades or attendance) or struggled with the same issues (creating specific, SMART goals), the teacher facilitated whole-group conversations about student goals and action steps.

The class discussions allowed students to connect around their goals, dig deeper into their successes or barriers to success, and expand upon their strategies for their next set of goals. This approach led to a greater sense of accountability and teamwork among students as they shared strategies for achieving goals with each other, as described by one student: "I'm the one helping my peers when it comes to their goals. I had a friend that had a terrible sleep schedule—I helped him get a better one and work on it."

This approach is one potential strategy to scaffold students in developing their goal setting skills and can be a creative way for schools to supplement individual case conferencing. Pairing group work with individual case conferencing ensures that students maintain contact with their primary person and do not fall through the cracks.

aligned to their needs at that particular point in time. Most primary people drove the goal-setting process, often telling students what goals they should focus on, as described by one primary person manager:

> …The lift is all on the primary person and the students aren't taking enough ownership. …For the most part, [the primary person is] sharing their screen and pulling up the student's individualized learning plan and saying, 'Here is the goal I want you to work on and I want you to do it by this time.' So, it's not very convincing as to whether or not the student feels like they got into that goal and feels good about accomplishing it.

Students in focus groups said they were resistant to setting goals because they did not like having to stick to regimens, or they did not believe they could accomplish the goals in the first place. One student said he felt like he had to "make something up on the spot" for his goals during the meetings. Primary people reported that some students went through the motions of goal setting and created superficial goals or used the same goal from week to week. Observations of a small sample of academic case conferencing meetings showed that about half of the meetings resulted in goals that were not SMART (not specific, measurable, or time-bound). For example, in one recording the student created an academic goal to "reach 10% on my online course" and a personal goal to "cut back on overthinking and be more lax with my loved ones."

Interviewed primary people recognized that it would take time for students to be in a position to write their own SMART goals and more broadly own the meetings. They also understood that primary people needed to learn how to relinquish responsibility:

> Kids don't just start writing their own SMART goals, but if you enable them so that you're writing them for them, they are just going to continue to allow you to do that for them...I think there is a lot of coaching needed in the next year … [on] how am I transitioning to giving the student autonomy for those goals.

Some primary people had started to try strategies to put more of the responsibility and cognitive load on students, including:

- Asking students what they wanted to talk about during the meetings or what their goals were for the week

- Having students plot their level of engagement and academic success on the matrix to facilitate self-reflection

- Having students share their computer screens to show the meeting documents and type the goals in themselves

- Encouraging students to contact and follow up with teachers if they had questions or concerns about assignments instead of following up with the students' teachers for them

- Providing students direct access to the data systems so they could hold themselves accountable

These examples illustrate small but important steps towards greater student agency. When students did exhibit agency and were able to set and meet goals on their own, it had positive impacts on their sense of self-efficacy. A student shared, "I like reaching my goals. When I do, I feel good about myself. I like getting it done on time. When I set a date for it to be done, I like to be done with them because I feel good about myself and the work is done."

> "I like [setting goals] because it holds me accountable.
>
> —Student

Conclusion

2020–21 was a challenging year for schools to try to implement this new academic case conferencing model. The pandemic necessarily shifted priorities for school leaders and teachers, with most focused on ensuring students had the opportunities and resources to learn. More than ever, students needed the attention and consistency afforded by academic case conferencing. Students who attended the meetings and engaged in the process found value in having a primary person check in with them and make sure they were staying on track with assignments and credit attainment.

Schools' experiences with academic case conferencing in 2020–21 offer some insights as they consider how to systematize their structures and deepen their practices in 2021–22 and beyond. How schools staff the primary person role has implications for staff's time, the supports primary people need based on their prior experience and expertise, and student pairings and relationship building. For example, too few staff serving as primary people may mean higher caseloads and lower staff bandwidth for holding case conferencing meetings. Schools can try to mitigate this challenge by providing sanctioned time, resources, and easily accessible data tracking systems. Schools also may consider heterogeneous groupings (students with a range of needs) for caseloads to facilitate strategic and differentiated support and flexible use of the primary person's time. Once caseloads are assigned, training and regularly coaching primary people to differentiate their approach for each student using a tool like the matrix can support cycles of success for small groups of students at a time. When meetings happen—either as part of regular advisory periods or based on individuals' schedules—affects the consistency and frequency of meetings; building case conferencing into existing structures, such as advisory periods, may lead to greater consistency. Finally, the presence of a tracking system that is accessible to both primary people and students plays a key role in making meetings more efficient, holding students accountable for setting and meeting goals, and enabling school leadership to monitor the efficacy of the primary person system and support continuous improvement as academic case conferencing expands.

The ultimate goal of case conferencing is to build student agency and ownership of their learning. Achieving this goal requires primary people to develop strong relationships with their students and then gradually scaffold the transition of ownership over the case conferencing meetings from themselves to their students. In 2020–21, primary people focused on building relationships as the foundation for effective case conferencing. Moving forward, schools will need to support staff to identify strategies for helping students take ownership of the meetings and set appropriate goals. Building this capacity for self-direction should help students complete the steps to finish high school and support their postsecondary success.

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