

# On Outcome-Based Education: A Conversation with Bill Spady

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*We're hearing more and more these days about outcome-based education. Why do you think that is?*

I see two reasons. First, over the last 20 years, some courageous and pioneering school districts have used the principles of outcome-based education to generate some remarkable results. In other words, there's a track record.

Second, schools are under pressure to do something dramatically different. And I think that pressure is leading people to pay more attention to outcomes.

*What's your definition of outcomes?*

In its briefest form, an outcome is a culminating demonstration of learning. It is a demonstration: what it is the kids will actually do. Most people have thought over the years that the outcomes were the curriculum content: What will the kids know? What can they recall on a test? But outcomes are not content, they're performances.

One of my major points is that outcomes occur at the end. This has become one of the biggest issues in outcome-based education because a lot of educators started with microconceptions of the outcomes and opportunities to learn and we now have gone to macroconceptions of those same things. Years ago, we had outcomes that were really just little skills. Now, we've got complex role performances as culminating outcomes. From an OBE perspective, it's not a matter of what students had, or what courses they have taken. It's a matter of what they can do when they exit the system.

*Surely, though, there must be some incremental outcomes along the way, aren't there?*

There are checkpoints along the way, sure. Many people call them benchmarks. We call those things *enabling outcomes*. They are the building blocks leading to the ultimate culminating demonstrations.

*Such as "The student will be able to list the five causes of the Civil War"?*

No, sorry; that is not an exit outcome. But, "Identify and explain the fundamental causes and consequences of the Civil War" would be an enabling outcome worth pursuing enroute to some larger exit outcome.

*Some of this sounds a lot like mastery learning.*

Yes and no. If we think of the modern history of this idea as starting in 1968 with Ben Bloom's essay "Learning for Mastery," we've had almost a quarter of a century of what people are now calling outcome-based education. But I'd say that the agenda of what were called mastery learning schools was more success-based than outcome-based. The focus was on creating more success for all the learners on whatever the individual teachers were teaching. Outcome-based education focuses on defining, pursuing, and assuring success with the same high-level culminating outcomes for all students.

### ***How is outcome-based education different?***

OBE can be defined in terms of four principles. The first, in shorthand form, is *clarity of focus*. That means that all curriculum design, all instructional delivery, all assessment design is geared to what we want the kids to demonstrate successfully at the "real" end—not just the end of the week, the end of the semester, the end of the year—but the end of their time with us.

Principle number two is *expanded opportunity*. It means expanding the ways and number of times kids get a chance to learn and demonstrate, at a very high level, whatever they are ultimately expected to learn.

Number three is *high expectations*, which means getting rid of the bell curve. We don't want bell curve standards, expectations, and results; we want all kids able to do significant things well at the end.

The fourth principle is *design down*: design curriculum back from where you want your students to end up.

### ***You began tracing the history of this idea. Let's talk for just a moment about your own intellectual history. How did you become so passionately committed to OBE?***

Well, it was partly because of some fascinating coincidences. I grew up in a town called Milwaukie, Oregon. When I was a graduate student and a member of the admissions staff at the University of Chicago, where I had done all my undergraduate work, I went back to Milwaukie to recruit students for the University of Chicago. I met this bright, intense, athletic young man named Jim Block and got him to come to Chicago. And he and I became fast friends.

When Jim finished his bachelor's degree in 1967 at the same time that I finished my Ph.D., he said, "I have this strong background in mathematics and like the research you're doing in education. How can I combine my mathematics with research in education?" So I introduced him to Benjamin Bloom—and the rest is history. Block became Ben Bloom's graduate student just as Bloom was developing the "Learning for Mastery," idea. Block did a lot of the basic research in "Learning for Mastery" and I was one of the earliest to know about it because I'd heard it straight from Jim, as it was unfolding.

### ***But you weren't a statistician; you were a sociologist.***

Right. I joined the faculty at Harvard to teach social relations and education. My research interests were in the issues raised by the Coleman Report of 1966: equity of achievement, social class, and social mobility, but I also had a lot of organizational theory under my belt. So, when Block told me about the fundamental changes associated with mastery learning—turning time into a variable instead of time being a constant, and having what I now would call a criterion base for standards instead of comparative standards—I found the ideas theoretically compelling, and I took them immediately to the educational system level—because to me the fundamental barriers to making the mastery learning idea work were at the organizational and institutional level. So I said to Jim Block—I mean we literally made an agreement that day—"You fix the classrooms, I'll work on the total system."

### ***Whose job was bigger?***

Well, I don't know. He had two million classrooms to work on; I had 50 states. But the changes we envisioned are starting to come now. People like Ted Sizer have done monumentally important work this last decade in calling attention to these systemic barriers: Carnegie units as seat time credentialing, and courses considered to be whatever subject matter you can learn in nine months.

***Okay, we've covered the University of Chicago and Harvard University. What about OISE?***

Well, it was during the time I was at the Ontario Institute in Canada (1969–1973) that I began to shift my interests about my professional identity. I began to see myself less as a pure researcher and more as someone compelled by the issues to get the research and ideas into action. Both the substance and the purpose of my work changed a lot.

***So when I first heard about you, you were at the National Institute of Education (now called OERI), working on competency-based education. In fact, you were arguing against minimum competency tests, insisting that they were not adequate measures of competency.***

Yes! That was 1973–1978. We have a long history in this country of taking good ideas and bringing them down to such low common denominators that they're unrecognizable and unappealing. Twelve to fifteen years ago the big struggle was between “real competency” and what people were calling “minimum competency”: taking a legitimate notion—people need to be competent—and translating that into rigid testing programs to see whether kids could put commas in the right place and add columns of numbers by a certain age.

***Those aren't competencies, right?***

No. I think a competency is a much larger construct that integrates and applies a lot of related skills, similar in fact to what are called transformational outcomes. Today, outcome-based educators are talking about complex roles performance in real situations with real demands.

What happened in that early era was that people took the exciting notion of having a system based on competency rather than on time, and they destroyed the idea of competency. And the same thing will happen to outcomes if we're not careful.

***Do you really think so?***

Absolutely. In January of 1980 we convened a meeting of 42 people to form the Network for Outcome-Based Schools. Most of the people who were there—Jim Block, John Champlin—had a strong background in mastery learning, since it was what OBE was called at the time. But I pleaded with the group not to use the name “mastery learning” in the network's new name because the word “mastery” had already been destroyed through poor implementation. I argued that we had about five years before they destroyed the term “outcomes,” but at least we could get a start and pursue a clear vision of an idea. Well, I was wrong; it took 10 years instead. But now anything that moves is called an outcome.

***You say that all terms become distorted and misused. Why do you think that happens?***

Terms get distorted when policymakers get hold of them. It's understandable; they're trying to force accountability on a system whose subtleties they don't recognize or appreciate because they think it's fundamentally nonaccountable—and they're right. So terms that sound right get used in all kinds of ways. The result today is that “outcomes” have been taken to mean test scores on tests of academic content. The notion of higher-order competencies—of complex role performances—is absent from most state agendas.

***But now we're beginning to see exceptions, right?***

Yes, especially in Pennsylvania, Minnesota, and Virginia. Minnesota deserves credit as the real pioneer. There's currently a lot of confusion and turmoil around there, but Minnesota was the first state to recognize the need to redefine the credentialing system and to have some higher form of exit outcomes for its graduates.

The present credentialing system in virtually all states is based on Carnegie units—seat time—with grading based on vague and inconsistent criteria. And when the grading is done in ink, that's the end of opportunity for kids.

***And you're saying that the state of Minnesota officially understands that now?***

Well, an awful lot of policymakers in Minnesota understand it. The state legislators who put these ideas together three years ago understood it very well. I asked them, “Do you realize that this means not everybody is going to be in school the same amount of time? Do you realize they're not all going to take the same courses?” They said, “We don't care. If they can't demonstrate the outcomes of significance, then we shouldn't be letting them out of school.” Those policymakers, exceptional people that they were, understood that three years ago. There is a lot of backsliding in Minnesota just now, but to their credit, the state board and department of education have defined a set of what are basically higher-order—what we call transitional—exit outcomes.<sup>1</sup>

As for Pennsylvania, last March 11, the state board pulled the plug on the calendar as the definer of the educational system in Pennsylvania.

***Do they really mean it?***

Yes. They've taken most of the time-based stuff out and will replace it with outcomes, although the nature of those outcomes is not clear as of yet.

***That's really exciting. One thing that could make their work more difficult, though, is a decision by the nation's governors to set national goals that emphasize the learning of traditional school subject matter.***

Yes, that's very unfortunate. They seem stuck in an old paradigm of thinking about the purpose of education and the curriculum.

***Meanwhile, states and school systems that have taken the lead in defining the kind of outcomes you're talking about are struggling with the question of how their conventional curriculum relates to these very high-level outcomes.***

Yes, and in many ways, it doesn't. My colleagues and I talk about two kinds of profound changes that need to happen if the system is going to be seriously outcome-based. One is, you have to stop being time-based. The second is to stop being curriculum-based.

Most of the recent history of outcome-based education has involved people taking their existing curriculum and writing outcomes derived from it. Today, we call that approach CBO: Curriculum-Based Objectives, not OBE. Currently, OBE advocates are talking about transcending that whole process. We are starting with what the research suggests about the future and we design down, or design back, from there. We're talking about a systematic process called Strategic Design: determining as well as we can from studying the literature and available data about future trends and conditions what our kids will be facing out there in the world. Once we get a reasonable handle on those conditions, we derive from them a set of complex role performance outcomes that represent effective adult functioning: to succeed as adults, people will have to be able to do this and that under these and those kinds of conditions. This emphasis on complex role performances puts the whole present curriculum content structure up for grabs.

***In a fully outcome-based system—what you call a transformational OBE—the traditional subject-based curriculum disappears?***

Yes, as the basic definer and organizer of the curriculum. But content itself can't disappear; we just develop a fundamentally different rationale for organizing and using it; one that is linked much more to what we call the significant spheres of successful living rather than to separate disciplines and subjects. Certain musical knowledge, certain aspects of philosophy, great works of literature and art: they'll be taught, of course, but they won't be segregated into separate subject compartments, and they'll be linked more to the quality of life experience.

***Still, there is such a thing as mathematics, and it has a definite structure. You don't learn it overnight, you don't learn it by accident. Don't we have to say we want the kids to know mathematics?***

Mathematics in our framework is an enabling outcome, not an outcome in its own right. It is a critical enabler to function effectively in many life roles. It is not an end in itself.

***Mathematics educators have never claimed that mathematics was an end in itself. They said it had all sorts of important purposes.***

Good! Then the question is whether it's best to teach it as a totally separate subject, 50 minutes a day, in its own separate classroom, or whether it should be learned in ways that link it to real-life problems, issues, and challenges so that it becomes the tool it was intended to be.

***Do you agree with Diane Ravitch that students should study history every year?***

Understanding the historical background and evolution of whatever is being learned is very important. Should we weave the evolution and historical development of ideas and institutions throughout everything we teach? Yes. Should kids take a separate course called history every year that starts at some ancient time and moves forward to the present? No. Should they thoroughly examine current problems, issues, and phenomena in depth and ask why, why, why, about their origins and relationships? Yes.

***What is your model of the curriculum, then? Where do the disciplines of science and history and music fit in? What does the written curriculum—plan for what students are to learn—look like in an outcome-based program?***

Well, as I've said, you start with the exit outcomes: the complex role performance that the significant spheres of living require of us. After that, you're dealing with a blank sheet but have a million exciting choices. These choices involve two things: the kind of competencies you need to build and the kinds of problems and issues they are linked to.

***And what do you do with the blank sheet and choices?***

Well, let's assume that you have those role performances arrayed at the top of a matrix—actual demonstrations of the capability to address life-role changes.

***Like the role of citizen?***

Exactly. The critical dimensions or kinds of performances that you want to see demonstrated become the columns of that matrix. The rows of the matrix are the significant issues and phenomena they will encounter within those life-roles. So the decisions you make as you fill in the rows and cells of that matrix are your

curriculum design decisions: they involve the knowledge, competence, and orientations (our word for the affective and attitudinal dimensions of learning) that you deem critical for assuring success on the outcomes.

***It's probably fair to say that no school system has completely converted to this new approach to curriculum. But you're saying a number of school systems are making significant headway on it.***

Yes indeed. During this school year, several districts have committed to transformational OBE.

***Such as?***

Jefferson County, the largest district in Colorado; Birmingham, Michigan; Syracuse, New York. We've worked extensively in Aberdeen, South Dakota; Ferndale, Michigan; and of course Aurora, Colorado, the district that pioneered role performance exit outcomes.

By the way, it's been very impressive to me to see how well people have accepted the Aurora conception of outcomes. When we show the Aurora outcomes to people in other districts, they say, "Yes—that's the kind of complex outcomes we want for our kids." And the districts that I just mentioned, plus the Commonwealth of Virginia, have expanded on their approach significantly during the past year.

***Well, I can imagine education administrators being sold on it. But how do you get skeptical parents and citizens to accept it, people who are convinced that what we really need is for our kids to do better on the five big subject areas? How do you get ordinary sensible people to understand and support it?***

You do it by asking people to look at their own lives. As Lee Iaccoca said at the ASCD convention two years ago—when Mr. and Mrs. America get up in the morning and go out into the world, they don't do social studies, they do life. Parents are very responsive to these ideas. School systems are being criticized for not preparing kids for life, largely because their whole agenda has really been about getting "smart" kids into college. And that is the struggle that every district that wants to take outcome-based education seriously is going to have to deal with.

***You criticize subject-based outcomes, but our nation is busy developing new sets of standards which, to some degree at least, will be subject-matter based. Groups are working on standards for science, geography, English, and the arts, and we already have a challenging standard in mathematics. Can outcome-based education help students meet these new high-level standards?***

Absolutely—if that's what's important. The OBE classes in Glendale Union High School District in Arizona have blown the top off of the district's criterion-based subject matter tests that they've carefully developed and used for years. But is that the stuff we should be staking our educational system on? Even Glendale, with all of its traditional OBE success, is saying "No!" Should subject matter test scores be the outcomes of an educational system for the 21st century, or are those the outcomes of the last century? If you define something else as your outcomes—like higher-order role capabilities—kids will learn a lot of that content anyway but have much more to show for their time in school.

***I asked earlier about parents and other citizens. What about all the teachers who are caught up in the everyday work of teaching the traditional curriculum? They don't have the time to even think about an outcome-based approach. Wouldn't it make more sense to do some extensive retraining before dropping outcome-based education on them?***

Well, implementing authentic OBE is an evolutionary process and no one should try to drop it on them.

***Apparently, that has been the case in some places.***

You cannot mandate outcome-based education and hope to have it successfully implemented.

### *Pennsylvania just did, didn't they?*

No. Pennsylvania said you don't have to run your school district according to the calendar anymore. Now, that opens the door to how you *are* going to run your system. What the state is saying is that there will be a set of outcomes that are important for all Pennsylvania kids, but local districts will still have lots of discretion in how to achieve and document those outcomes. This is what we've been urging many states to do.

### *Okay. Suppose I'm a local educator who'd like to get started in the direction of OBE. What should I do?*

I think local educators need to do two things. First, they are going to have to petition, plead, or protest to their state boards and state departments of education for waivers from a lot of the traditional, time-based requirements that keep them from implementing a genuine outcome-based approach. That may not eventually be such a problem since states like New York and Texas are already taking the initiative to offer such waivers willingly to districts that apply for them.

The second thing is to keep reminding everybody that outcome-based education is a matter of consistently and creatively implementing the four principles. Keep asking the critical questions about the four principles. First, do we have a clear focus on what we expect of our kids? Second, are we willing to provide expanded opportunities for our kids to be successful? Third, what can we say about the system of expectations we have in our district? Look at our tracking; look at our grading system. And fourth, how do we design curriculum? Are we designing down from clearly-established outcomes, or are we simply buying textbooks and perpetuating what has been done for 100 years?

If you stay focused on the four principles, you will become more and more successful in applying them. And more and more of your students will be achieving the outcomes you value.

### **Endnote**

<sup>1</sup> W.G. Spady, and K.J. Marshall, (October 1991), "Beyond Traditional Outcome-Based Education," *Educational Leadership* 49: 67-72

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