

WHITEPAPER



BUILDING A STATE EQUITY STRATEGY

Dr. Stacy L. Scott

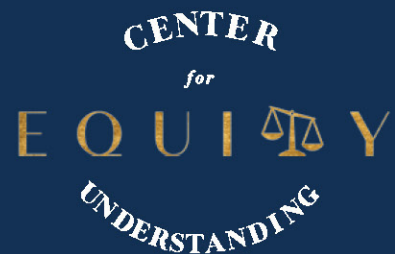
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REGION 5
Kentucky
Tennessee
Virginia
West Virginia



Building a State Equity Strategy

Region 5 Comprehensive Center

The Region 5 Comprehensive Center (R5CC) is one of 20 technical assistance centers supported under the U.S. Department of Education’s Comprehensive Centers program from 2019 to 2024. The R5CC serves the needs of Kentucky, Tennessee, Virginia, and West Virginia by building capacity to improve policies and programs to improve student performance.

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Executive Summary

The Challenge

Even though equity has become a hot topic, the pathway to making it a reality has not necessarily become clear. The national agenda on race, racial equity, and dealing with COVID-19 has pushed the challenge of equity to the front and center for schools.

This pressurized moment in our history has raised important questions: What are the steps to an effective equity journey? What are the standards and targets to guide the pursuit of equity outcomes? What are the conditions for success in an effective, equitable district? What are the capacities and practices of equitable leaders and practitioners?

Sources

This paper is designed to highlight sources of tools and frameworks that you can use to manage your steps to equity. Building personal capacity will enable organizational strategy. This paper will articulate strategies that will move you along in your equity journey.

Resources (Matrix, Highlights, Models, and Tools)

This paper will highlight a few resources that may be helpful to you and it will refer to many others. There are multitudes of resources available today to support equity development on a personal, organizational, institutional, and societal level. This can make it even more confusing at times. The pathway to equity requires creating your own plan to build capacity and make progress. There are tools and resources that will fit well into your organization. Be selective.

Districts and States (Case Studies and Exemplars)

Some practitioners have a head start on certain issues or on the journey overall but do not let that deter you. Facilitating equity is not a race, at least not one that can be won by speed alone. This paper will help you create a strong foundation with ideas for training and consensus-building on the definitions and strategies that you choose.

Personal Development (Being the Change We Want to See, Assessment/Development Plans)

Since you cannot go it alone, this paper will emphasize the skill development that will help leaders build a team around the work and then bring the community along.

Visions of Healthy Schools

Effective state education agency (SEA) support and equitable schools can be defined by quality practices and strategies.



Mapping the Journey

The journey to equity requires planning and guidance. This paper will outline ways to map your journey that can show how to get started and how to support an equity process at various levels.

Outcomes

This paper will offer guidance on how to pursue equity on a variety of topics.

Introduction

Determining how to meet the needs of all learners has become an increasingly poignant challenge for all SEAs. Understanding how this endeavor impacts all learners and learning what to do to rectify deficiencies in our systems has not been an easy journey. Fortunately, there has been a plethora of new sources recently creating resources to aid in this process. This report aims to highlight those resources.

The demand for support in the work of remedying inequities in education places pressure on SEAs to come up with additional, tailored technical assistance and guidance to help states and districts build capacity for managing the development of strategies to meet the needs of all learners as well as the needs of all leaders.

As technical advisors to schools and districts across the country, SEAs have a myriad of questions about what to do, how to do it, and what parameters to use in their efforts. Their questions can sound like these:

- » What can states realistically expect to be able to do to support districts?
- » What does the state's role look like in terms of inspiring and guiding districts to champion meeting the needs of all learners?
- » What support do technical assistance (TA) providers need to guide districts and manage the state's intervention strategies?
- » Who has a handle on how to do this work?
 - › What are they doing that is working?
- » Where do you begin?
 - › How much of the preparation to support states and districts is about personal development and cultural proficiency?
 - › What methodologies and frameworks are most helpful?
- » Where does the journey end?
 - › What are benchmarks for the journey?
 - › What is the optimal vision of equitable states, schools, and districts?

These are among the questions that we will seek to answer in this report. Here's what we hope you derive from this report:

1. ideas for personal development;
2. an overview of what is happening in the field;
3. methodologies and frameworks to guide the work;
4. recommended best practices; and



5. tools needed to facilitate the work.

As a starting point in answering these questions, here are some thoughts we want you to keep in mind.

» **What can states realistically expect to be able to do to support districts?**

SEAs can guide the way to effective practice. Entering the journey toward more equitable SEAs, districts, and schools can be murky. There is no one rulebook for where to begin or what to start with. Each of us has to identify the most salient variables in our areas of responsibility and decide how to assess and intervene in those challenges. The tools we may need may vary. SEAs can provide resources and support that builds capacity and makes it easy to identify models, strategies, and partners for the journey. Capacity building can be done at scale by a state that recognizes that there is a general need for building certain capacities such as cultural proficiency or systems analysis. Strategic planning is something that all states, districts, and schools must do. They should not all have to find supports and models individually. If SEAs curated best practices, then districts would benefit from the help, especially if they have limited resources for planning and capacity building.

» **What does the state's role look like in terms of inspiring and guiding districts to champion meeting the needs of all learners?**

Creating a menu of targeted SEA resources can go a long way to helping districts build effective plans to advance their equity strategies. SEAs can retrofit resources to fit in the local climate and culture in a way that avoids known traps and trip wires that can stall or derail the work. Highlighting districts and schools that are pioneers in the work can make the journey more accessible. While the state has the bully pulpit and can require that civil rights be protected, it is not an expedient long-term strategy to try to tell people to be more equitable. It must appear to be in the mutual interest of all stakeholders to build a more equitable society. Otherwise, they will only make superficial changes that obscure the real work that needs to be done. Sharing the state of the art in creating a plan for an effective journey towards equity is the best role a state can plan. Then, creating collective accountability can help peer support drive true collaboration and common learning that benefits everyone.

» **What support do TA providers need to guide districts and manage the state's intervention strategies?**

TA providers need to stay abreast of best practices. They need to have a thumb on the pulse of what the latest thinking is and what strategic tools and processes can help move states and districts to the desired outcomes.

» **Who has a handle on how to do this work? What are they doing that is working?**

This paper and the accompanying tools share a collection of practices, frameworks, and models from varying partners in the work, including SEAs and other public entities, foundations, and think tanks, as well as journals and other sources. There are a plethora of groups that have entered the



space of working on building capacity for equity. We make no attempt to collect them all. We do seek to show what some key partners have learned and the tools they have had success in using.

» **How much of the preparation to support states and districts is about personal development and cultural proficiency?**

We make the point here that the personal journey is essential for organizational success. Having tools can be of marginal value if there is no plan or blueprint for how to build. Even having a plan is not sufficient if it is not accompanied by a commensurate will to endure the process of deconstructing and building anew. In most cases, states and districts will seek to reform as opposed to total redesign. The political realities of education do not often lend themselves to the deconstruction or demolition of antiquated systems. Effective reform requires a clear vision of the outcomes. Then, with a clear plan, change can be progressive, and buy-in can be comprehensive.

» **As you begin, what methodologies and frameworks are most helpful?**

The framework you need explains the variables that you have to deal with in your environment. These will not be the same from one state or district to another. Even if they follow the same themes and categories, they will still look different as you cross the border. You need a model and a framework that explains your circumstances. That is why we will present a few prospects for you to consider and connect you to others if you need to search further for the right fit for you.

» **What is the optimal vision and adequate benchmarks for the journey?**

The *conditions for success* in managing for equity must include:

- » norms for equity conversations;
- » standards for systems in the practice of equity;
- » processes and strategies for managing equity;
- » standards for individual development in the practice of equity;
- » standards for leadership in the practice of equity; and
- » a leadership development model *and capacity-building strategies*.

Each of these is critical to establishing a baseline for moving equity forward. This combination of activities helps move an initiative beyond the basic definition of equity, which involves ensuring access to opportunities to learn and the achievement of equitable outcomes. It provides for capacity building so that all stakeholders have buy-in and the capacity for using an equity lens to evaluate decisions and outcomes. Only then can practitioners help the systems they manage achieve systemic reforms that undo the historical antecedents and drivers of inequity.



Chapter One: Conditions for Success

Setting the Norms for Personal and Organizational Growth

Defining Equity

Equity is both the state of access to critical opportunities related to accomplishing what is important, such as living a full and unencumbered life and the process of creating it. Removing barriers and structural impediments to opportunity is the work of equity. The eradication of policies that prevent free and fair access to society's privileges is the beginning of equity undoing cultural norms that protect exclusionary practices is the deeper work that involves changing longstanding biases and prejudice. Districts create equity when they set the conditions so that all students can achieve excellence. Providing all students the same resources may achieve equality, but it will not remediate past issues impacting performance. Therefore, that nominal equality of resources would not achieve equity because of prior conditions and continuing obstacles.

The pursuit of a more equitable society and our organizations requires defining some basic terms in our dialogue. Workforce Matters (Workforce Matters Funders Network) provides a useful set of terms, which we will reproduce here:

- » **Racial Equity** – The condition that would be achieved if one's racial identity no longer predicted, in a statistical sense, how one fares. When we use the term, we are thinking about racial equity as one part of racial justice, and thus we also include work to address root causes of inequities, not just their manifestation. This includes elimination of policies, practices, attitudes, and cultural messages that reinforce or fail to eliminate differential outcomes by race.
- » **Antiracist** – Used as an adjective, this describes action to dismantle systems of racism; support for policies that reduce racial inequity; and expressions of the idea that racial groups are equals.
- » **Diversity** – Diversity includes all the ways in which people differ, and it encompasses all the different characteristics that make one individual or group different from another. It is all-inclusive and recognizes everyone and every group as part of the diversity that should be valued. A broad definition includes not only race, ethnicity, and gender, but also age, national origin, religion, disability, sexual orientation, socioeconomic status, education, marital status, language, and physical appearance. It also includes different ideas, perspectives, and values.
- » **Inclusion** - Authentically bringing traditionally excluded individuals and/or groups into processes, activities, decisionmaking, and policymaking in a way that shares power.
- » **Intersectionality** – The interconnected nature of social categorizations such as race, class, and gender, regarded as creating overlapping and interdependent systems of discrimination or disadvantage; a theoretical approach based on such a premise.
- » **Multicultural Competency** - A process of learning about and becoming allies with people from other cultures, thereby broadening our own understanding and ability to participate in a multicultural process. The key elements to becoming more multiculturally competent are respect for the ways that others live in and organize the world and openness to learn from them.



- » **Power** – Power is unequally distributed globally and in U.S. society; some individuals or groups wield greater power than others, thereby allowing them greater access and control over resources. Wealth, whiteness, citizenship, patriarchy, heterosexism, and education are a few key social mechanisms through which power operates. Learning to “see” and understand relations of power is vital to organizing for progressive social change. Power may also be understood as the ability to influence others and impose one’s beliefs. All power is relational, and different relationships either reinforce or disrupt one another. The importance of the concept of power to antiracism is clear: racism cannot be understood without understanding that power is not an individual relationship but a cultural one and that power relationships are shifting constantly.
- » **Targeted Universalism** – Targeted universalism rejects the concept of a blanket universal solution, as that would likely be indifferent to the reality that different groups experience the institutions and resources of society in different ways. Targeted strategies to achieve a goal or solution address the realities of the different groups. Targeted universalism also rejects the claim of formal equality that treats all people the same as a way of denying difference. In targeted universalism, any proposal is evaluated by the outcome, not just the intent. For example, while a goal for employment may be universal, strategies used to achieve that goal may differ to be especially sensitive to the needs of the most marginal groups.
- » **Race Explicit/Race Conscious vs. Race Neutral** – This framework identifies a need for race-explicit (or race-conscious) recommendations to drive toward equity in workforce development and philanthropic practices, policies, and programs. To develop effective approaches and achievable outcomes, it is necessary to disaggregate data by race and identify as well as engage the People of Color affected by grantmaking in shaping solutions and goals. It is not possible to achieve the goal of racial equity using race-neutral methodologies or measures blind to the impacts and legacies of systemic racism.
- » **Implicit Bias** – Also known as unconscious or hidden bias, implicit biases are negative associations that people unknowingly hold. They are expressed automatically, without conscious awareness. Many studies have indicated that implicit biases affect individuals’ attitudes and actions, thus creating real-world implications, even though individuals may not be aware that those biases exist within themselves. Notably, implicit biases have been shown to trump individuals’ stated commitments to equality and fairness, thereby producing behavior that diverges from the explicit attitudes that many people profess.
- » **Race** – A socially constructed system of categorizing humans largely based on ancestry and on observable physical features (phenotypes) such as skin color. There is no scientific basis for or discernible distinction between racial categories. The ideology of race has become embedded in our identities, institutions, and culture and is used as a basis for discrimination and domination. The concept of racism is widely thought of as simply personal prejudice, but in fact, it is a complex system of racial hierarchies and inequities.
- » **Racism** – is different from racial prejudice, hatred, or discrimination. Racism involves one group having the power to carry out systematic discrimination through the institutional policies and practices of the society and by shaping the cultural beliefs and values that support those racist policies and practices.



- » **Structural Racism** – Racial bias across institutions and society. It describes the cumulative and compounding effects of an array of factors that systematically privilege White people and disadvantage People of Color.
- » **Systemic Racism** – Policies and practices that exist throughout a whole society or organization, and that result in and support a continued unfair advantage to some people, and unfair or harmful treatment of others, based on race.
- » **White Supremacy** – the idea (ideology) that White people and the ideas, thoughts, beliefs, and actions of White people are superior to People of Color and their ideas, thoughts, beliefs, and actions. This term also refers to a political or socioeconomic system where White people enjoy structural advantage and rights that other racial and ethnic groups do not, both at a collective and an individual level.
- » **White Supremacy Culture** – refers to the dominant, unquestioned standards of behavior and ways of functioning embodied by most institutions in the United States. These standards may be mainstream, dominant cultural practices; they have evolved from the United States’ history of white supremacy. It is an artificial, historically constructed culture which expresses, justifies, and binds together White-controlled institutions into the United States’ white supremacy system. It is the glue that binds White-controlled systems into the global white supremacy system.

Black, Indigenous and People of Color (BIPOC) – a term that seeks to highlight the Black and Indigenous communities, who in the United States have historically experienced racism and discrimination in a unique relationship to whiteness and white supremacy. The term includes all People of Color, including people of Latinx/Hispanic and Asian and Pacific Islander descent.

The underlying philosophical approach used in this report is **targeted universalism**, which focuses on the needs of the entire student body. The needs of specific groups are viewed in relation to the goals for the whole. Strategies that bind us together with a common goal can help us achieve success for all our children for the sake of future generations.

“We urgently need aligned and coherent strategies that create belonging and promote bridging. Targeted universalism provides an approach for orchestrating these efforts”.

–powell et al. 2019.

The evolving pursuit of equity has helped remedy past hindrances to performance for various subgroups and systemic breakdowns. Each state and district has had its own unique journey and experience with enhancing equity. Our continuing challenge is to find approaches that bind us together and help us tackle the problems of inequity head-on. In this way, our politically-vested interests will not become obstacles to our goals. Targeted Universalism is an approach that leads to beneficial change that lifts everyone while meeting the needs of varied groups. The hope embedded in this strategy is that we may build a sense of belonging for all groups by focusing on universal goals that meet all needs in general and of each group in particular. Beyond this initial introduction



to the idea as a philosophical approach, further detail will be provided at the end of Chapter Four. Here are five initial steps that can begin the exploration of targeted universalism:

“Five Steps for Targeted Universalism

1. Establish a universal goal based upon a broadly shared recognition of a whole problem and collective aspirations.
2. Assess general/whole population performance relative to the universal goal.
3. Identify groups and places that are performing differently with respect to the goal. Groups need to be disaggregated.
4. Assess and understand the structures that support or impede each group from achieving the universal goal.
5. Develop, prioritize, and implement targeted strategies for each group to reach the universal goal (powell et al. 2019).”

The following chart in Figure 1.1, developed by the Education Development Center (Hanover Research p.13), offers guiding questions that can be used in discussion as you identify the current state of equity in your organization.







Figure 1.1. Guiding questions on interrelated elements/indicators of equity



Guiding Questions on Interrelated Elements/Indicators of Equity

Description: District leaders can use these guiding questions to facilitate a discussion or individual reflection on the interrelated elements or indicators of equity. District leaders should look at district- and school-level data when reflecting on these questions. The EDC recommends that districts obtain data from district data systems, surveys, focus groups, interviews, and classroom observations.

 ACHIEVEMENT STATUS
<ul style="list-style-type: none"> ▪ How are students performing? ▪ How have achievement rates for subgroups changed over time? ▪ What teacher and staff qualities are related to student achievement across subgroups?
 EDUCATIONAL OPPORTUNITIES
<ul style="list-style-type: none"> ▪ What types of in-school and afterschool opportunities are offered, and which students participate in them? ▪ What are the teaching and learning conditions?
 SOCIAL-EMOTIONAL SUPPORTS
<ul style="list-style-type: none"> ▪ How is school discipline implemented? ▪ What social-emotional supports exist for students and who has access to them? ▪ What policies and practices are in place to address historical and social inequities?
 CLIMATE AND CULTURE
<ul style="list-style-type: none"> ▪ What is the culture of the school and district? ▪ What practices are in place to support engagement among multiple stakeholders (students, teachers, administrators, families, community members)?

Source: [Toolkit: Systemic Implementation of Equity. Hanover Research 2019. p.13.](#)

Components of Equity

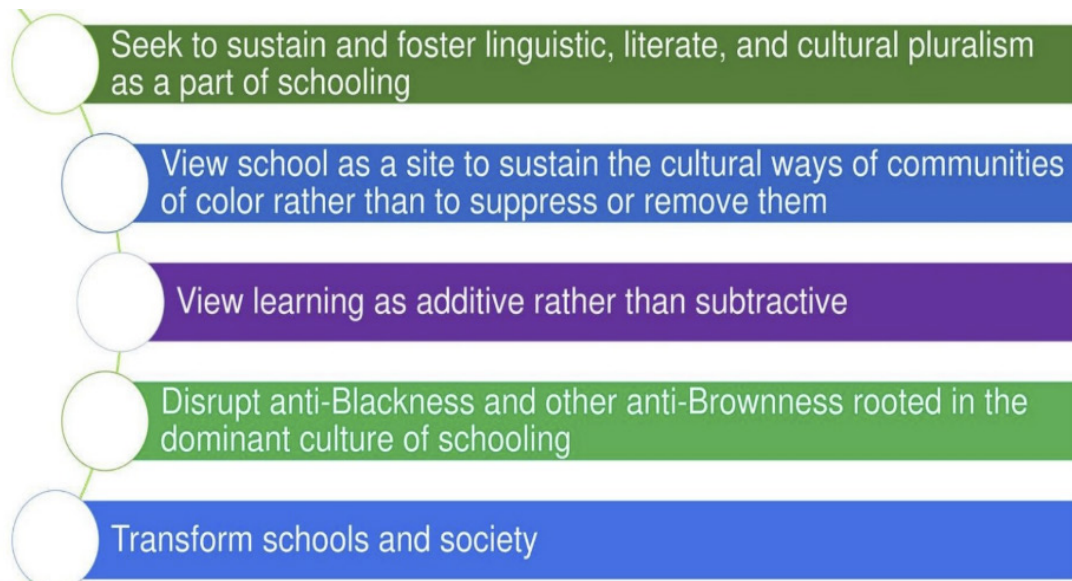
It is important to be clear about what the core components of equity are, although it is difficult to talk about equity in some venues. It is even more difficult to talk about equity if it remains obscure. The systematic implementation of equity begins with the management of resource distribution, education programs, school climate, and achievement. Thoughtful resource distribution requires outlining how decisions about resources will impact basic district goals, administrative practices, finances, support services, and personnel. Since the basic premise of equity is that we all do best when all of our students succeed, equity requires programming to counter the social disadvantage with which some students enter school. We need programs to eradicate segregation in schools that privilege some with greater academic rigor, quality instruction, extracurricular activities, and



challenging career pathways. Attention to climate and achievement are leading and lagging indicators, respectively, which can help monitor and manage equity overall.

Beyond elaborating on the aspects of equity, a further step is to define what its role is in education. Creating culturally responsive education and learning that reinforces the identities of all learners fosters pluralism and appreciation for the varied cultural ways of different communities. A focus on equity adds to the base of cultural knowledge that children bring to school and interrupts ways in which dominant culture may undermine positive identity. It is, therefore, transformative, in that it undoes antagonistic elements rooted in society and our education systems that are contrary to effective development. Figure 1.2 shows the role of culturally responsive instruction (Gay 2017; Paris & Alim 2017).

Figure 1.2. The role of culturally responsive and sustaining education



Source: Excerpt from *Culturally Responsive Teaching: Theory, Research, and Practice* (Gay 2017); *Culturally Sustaining Pedagogies: Teaching and Learning for Justice in a Changing World* (Paris & Alim 2017).

Components of Inequity and its Impact on Education

If we fail to call out the manifestations of inequity in our systems, we may not be able to clearly see what is needed to create healthy educational systems. We need to know what to say when asked, *what are the ways in which our system is underperforming, unfair, or inequitable? And, what is the work we must do?*

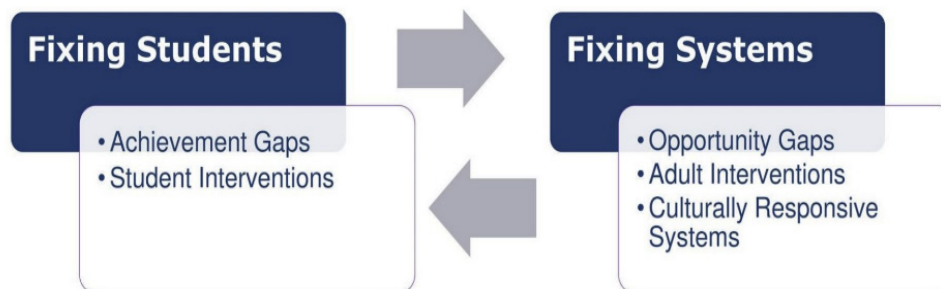
There are many examples of inequity in our systems. Conscious and unconscious discrimination can occur in schools affecting how students learn, what they aspire to, and what opportunities they will be ready for after graduation. Usually, discrimination happens related to race, ethnicity, nationality, language, religion, class, gender, sexual orientation, or disability. Students from lower-income households may arrive at school with less preparation and social capital than students from higher



incomes. If they arrive at a school in a poorer rural or urban community, then they may encounter fewer teachers, outdated facilities, and limited opportunities. Students who arrive at school with a cultural background that is not represented in the texts and school culture are at risk of not understanding norms, customs, expectations, slang, or policies. Common assessments are often not designed to adapt to the social and linguistic differences of children. Students may receive lower levels of rigor because of their language skills. Lower expectations and varied quality of instruction can consign students who do not fit the norm to a career of underperformance in American education.

Historically, closing gaps in achievement meant that the problem was centered on the students. Our interventions were designed to fix students. Today, we realize how much more apt it is to focus on fixing our broken systems which have failed to meet the needs of all students. Opportunity gaps more aptly speak to the notion that the students are not being provided the opportunities to learn with adequate support and resources. The intervention must be at the systemic level and it must outfit teachers and administrators with the tools, training, and support to meet student needs. The notion of refocusing our attention was captured by Dr. Seena Skelton as seen in Figure 1.3 (Byrd et al., n.d.; Fergus, Munk, and Skelton 2020).

Figure 1.3. Refocusing our gaze towards opportunity gaps



Source: [Byrd et al., n.d.](#); [Fergus, Munk, and Skelton 2020, p. 18.](#)

No doubt, it is humbling to consider that the fault has been in our own failure to see the performance problems in our systems as societal, cultural, and organizational instead of focusing on lagging outcomes data which were artifacts of our historic systemic perspectives.

The problem of disproportionality (Lopez et al. n.d.) is complex and the solution requires a multi-faceted approach. When we fail to consider the many facets of the issue, we are destined to fall short of addressing the issue writ large. Figure 1.4, from WestEd, describes the state of outcome inequalities in education in Arkansas and shows the degree of complexity in this issue (Fergus, Munk, and Skelton 2020).

Figure 1.4. Example of the complexity of outcomes due to inequality, Arkansas

Factors Implicated in Outcome Inequalities

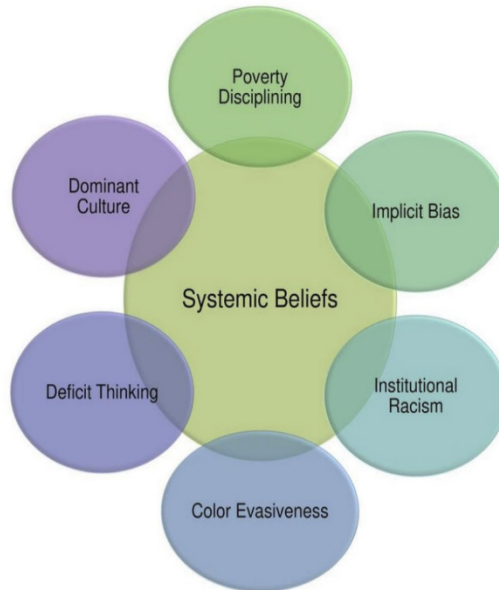


Source: [Fergus, Munk, and Skelton 2020, p. 36.](#)



It is important to carefully identify the inequities that plague a system. A poor diagnosis leads to a poor treatment plan. An analysis that accounts for the interaction between the contributing factors will enable the creation of a solution set that addresses each critical issue with sufficient gravity and intensity to create a real prospect of success. A focus on systemic beliefs and practices can help to identify the root causes of key problems as laid out in WestEd Figure 1.5. (Lopez et al. n.d.).

Figure 1.5. Example of systemic beliefs to identify and help address root causes, Arkansas



Source: [Fergus, Munk, and Skelton 2020, p. 41.](#)



Chapter Two: Leadership for Equity

The Work of Equity

The work of enhancing equity begins with personal transformation. Equity requires adaptive strategy formulation and reformulation during implementation. Leading for equity cannot be a transactional process managed by technical solutions. This adaptive work requires an equity mindset and using an equity lens to respond to emergent issues. An equity mindset is trained to view structures, processes, and resources in terms of their differential impact on various stakeholders. Using an equity lens, a practitioner can identify the impact of equity-related decisions on individual, organizational, and systemic levels. They can articulate strategic responses to remedy inequities that can transform the culture of organizations and build equitable systems.

Learning About Equity in the Field and Getting Comfortable With It

In the last quarter century, the work of equity has grown exponentially. The early emphasis of equity initiatives before 2000 was on integrating immigrant populations into states like Minnesota, where waves of newcomers needed the protection and support of policies that ensured they would be given equal treatment in public services, most notably in education. The broader conversation about equity waited until the 2000s when questions arose about how to go beyond diversity efforts, which were popular in corporate settings. Over the last decade, equity resources, centers, models, and supports have become ubiquitous. The volume of resources can be overwhelming as you try to find useful guidance for the work.

As leaders and coaches, it is important to gain a level of comfort with using equity-related definitions and terms, approaches, and resources so that individual growth can mirror our aspirations for organizational strategy and the societal demand for equitable solutions. Self-reflection and intentional learning are important parts of engaging in growth on this topic. Figure 2.1 highlights a rubric for engaging in self-reflection and growth for equity. Finding a few trusted sources can help you on your way and learning about what equitable practice looks like can help you identify where you are now in your journey and practice. Remember that the journey is about getting started and not getting things perfect. You want to build a road map for yourself and your specific organizational needs that makes sense since we all have different needs and starting places. There is no one-size-fits-all: you will have to retrofit the strategies you see to your political and cultural environment.



Figure 2.1 Practice/rubric for self-reflection and leadership in equity awareness and growth

Little or no equitable practice	Emerging equitable practice	Proficient equitable practice	Exemplary equitable practice
<p>Leadership does not have an existing plan to grow its understanding of how privilege, power, and oppression operate in school and society.</p> <p>Leadership has not examined its own biases, assumptions, or positions related to racism, classism, sexism, sexual orientation, religion, age, disability, or home language, or other forms of oppression.</p> <p>Leadership has not yet developed capacity to address equity issues or disparities for diverse groups.</p>	<p>Leadership has a plan to further develop awareness, knowledge, commitments, and skills regarding personal growth focused on equity.</p> <p>Leadership begins to examine its biases, assumptions, and positions related to racism, classism, sexism, sexual orientation, religion, age, disability, and home language, or other forms of oppression, but does not make personal growth for equity a high priority in its practice.</p>	<p>Leadership makes equity a central focus on its growth plan and seeks out necessary resources to facilitate personal and intellectual work to understand how privilege, power, and oppression operate in school and society.</p> <p>Leadership regularly examines its biases, assumptions, or positions related to various forms of oppression.</p> <p>Leadership has evidence of improvement in personal awareness, knowledge, commitments, and skills in addressing equity issues.</p> <p>Leadership articulates core values of democracy, social justice, and equity, and takes risks when equity conflicts with status quo practice.</p>	<p>Leadership prioritizes ongoing personal and intellectual work to understand how privilege, power, and oppression operate—both historically and currently—in school and society, as well as to examine its own identities, values, biases, assumptions, and privileges.</p> <p>Leadership has evidence of high levels of awareness, knowledge, commitment, and skills to address equity issues.</p> <p>Leadership consistently exacts core values of democracy, social justice, and equity; has the will to act, taking risks to put itself on the line; and models continuous learning and inquiry in pursuit of equity.</p> <p>Leadership continually asks: Who are we serving/not serving and why? Who is being included/excluded and how?</p>

Source: [Larson et al. 2012](#).

Engaging in Self-Reflection and Growth for Equity

This practice explores the personal and intellectual work your team is doing to understand how privilege, power, and oppression operate—both historically—in your school and in society at large. It also looks at how you examine your own identities, values, biases, assumptions, and privileges. This includes your leadership team members defining core values around democracy, social justice, and equity; having the will to act; taking risks to put themselves on the line; and modeling continuous learning and inquiry in pursuit of equity. An exemplary score on this practice means your leadership team continually asks questions like: Who are we serving/not serving and why? Who is being included/excluded and how?

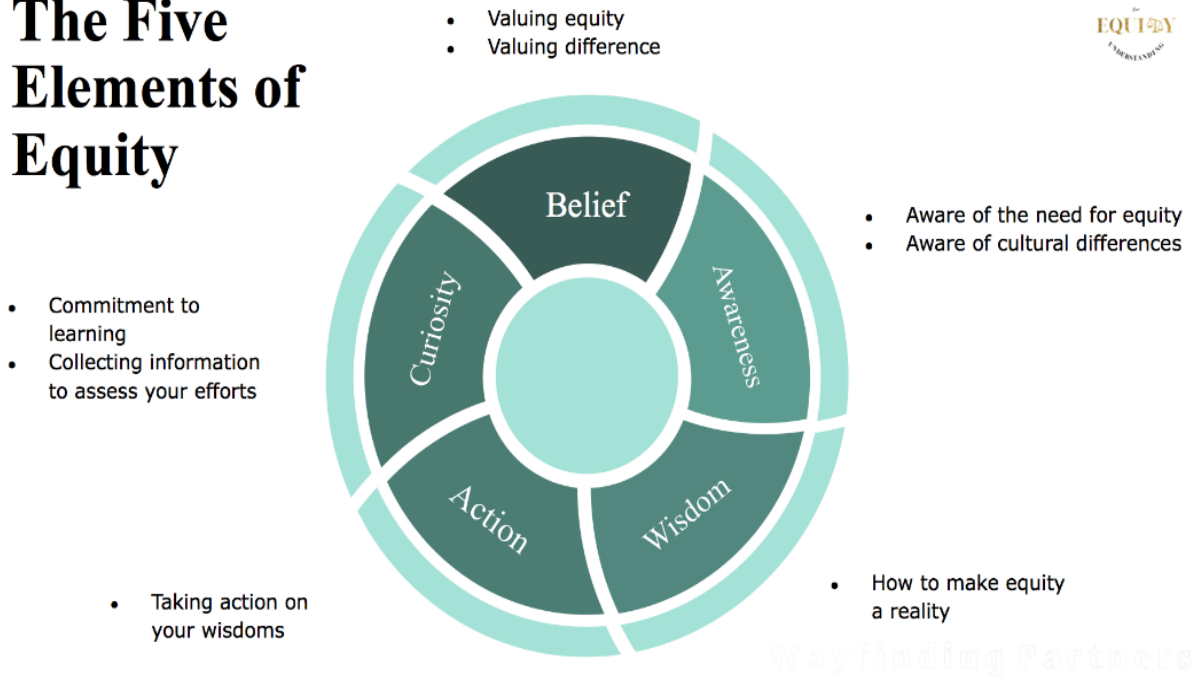


Build Competency for Managing Diversity and Using an Equity Lens

The Center for Understanding Equity has developed an Equity Development Theory for managing your *personal* equity journey and to develop your capacity for equity. Values, beliefs, awareness, action, wisdom, and curiosity are all critical aspects of growth and development for cultural competency and the capacity for managing equity (Scott 2021).

Figure 2.2. Five elements of equity for managing your personal journey

The Five Elements of Equity



Source: Excerpt from *Fearless Leadership for Making Equity Work* (Scott 2021).

As we traverse through the stages of development of our equity capacity, we develop our cultural competency. Cultural competency includes awareness of the differences between groups, the implications of their experiences in our society, and the differential needs. From that foundation, capacity for equity enables you to be able to detect and respond to inequity in its various manifestations. The Equity Development Theory along with the accompanying tools and assessments offer insight into personal development and a baseline for personal insight into the capacity to manage equity (Scott 2021).

Assessment of Individual Capacity for Dealing With Equity

The Equity Proficiency Check is an assessment for growth based upon the Five Stages of Equity Development. It offers insight into the progress of development in proficiency for cultural awareness as well as knowledge and experience with equity. Your equity journey is personal, and it influences your impact on society and your work. Most of us will find ourselves in a state of “emerging,” figuring out the best way to develop the skills needed to view the world in ways that



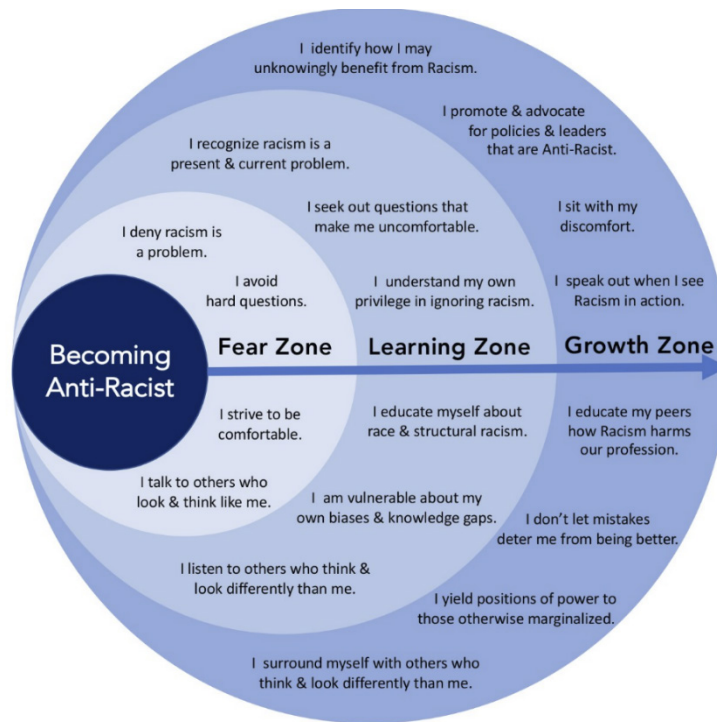
allow us to see inequities and to understand how they disadvantage everyone involved in one way or another (Scott 2021). Even those who are “advantaged” by preferential status are deprived of the opportunity to prepare and live in a pluralistic society that is healthy enough to care for the least and the greatest among us. An assessment can help create the basis of conversation with a common language and personal reflection.

Zones on Becoming Antiracist

A frequently used tool for entering discussions on race and racism is called the Zones for “Becoming Antiracist” (Figure 2.3, Ibrahim 2019, inspired by Dr. Kendi’s work: How to Be an Antiracist).

This tool helps participants identify their current status in their response to opportunities to grow in this area. It facilitates discussion on typical areas that surface fears on the topic and lays out aspirational goals for those seeking to continue their growth.

Figure 2.3. The zones for becoming antiracist



Source: [Ibrahim 2019](#).

Building Leadership Capacity for Equity

Leadership capacity is the natural next consideration after the development of your personal equity sensitivities. Leadership is difficult enough without layering on the issues of race and dealing with equity issues. Developing sensitivity to issues of race is a core competency for the era we are living in. Fortunately, there are resources to help process the challenge of leading with race in mind. This graphic in Figure 2.4 is drawn from one such useful resource – [Navigating EdEquity VA: Virginia’s Roadmap to Equity](#) (Virginia Department of Education 2020, p. 24).



Figure 2.4. Key descriptors of courageous leaders

COURAGEOUS LEADERS:



- Make inequities visible;
- Disrupt discourse, practices and policies that perpetuate inequities;
- Encourage programs that support multi-lingual language and literacy development;
- Normalize conversations about race, racism, and inequity;
- Support teachers and building level administrators in efforts to address equity and racism;
- Promote diversity and cultivate responsibility for equity;
- Establish and communicate anti-racism and equity polices to ALL stakeholders;
- Establish and communicate clear equity goals;
- Allocate resources to advance equity goals.

Source: [Virginia Department of Education 2020, p. 24.](#)

Another approach to the work of creating equitable schools is the focus on results-based leadership.

Results-based leadership equips people with the skills, the tools, and the collaborative mindset they need to make a real and measurable difference for children and families.

— Patrick McCarthy, former president and chief executive officer of the Annie E. Casey Foundation (Annie E. Casey Foundation 2013).

Five Core Competencies of Results-Based Leadership

1. **Be results-based and data-driven**, establishing clear goals and using data to assess progress and change course as needed.



2. **Use the self** as an instrument of change to move a result, based on the belief that individual leaders are capable of leading from whatever position they hold.
3. **Bring attention to and act on disparities**, recognizing that race, class, and culture impact outcomes and opportunities for vulnerable children.
4. Master the skills of “**adaptive leadership**” which makes leaders aware of the impact of values, habits, beliefs, attitudes, and behaviors associated with taking action to improve results.
5. **Collaborate** with others, understanding that the capacity to build consensus and make group decisions enables leaders to align their actions and move work forward to achieve results

(Annie E. Casey March 2014)

In results-based work, there are four key concepts leaders are trained on and embrace in order to transform talk into action:

- » A form of leadership founded on the five core competencies noted above that enable leaders to make changes intended to produce results
- » Defining results, engaging partners to achieve results, and holding individuals and the group accountable by using data to assess progress
- » Using Results-Based Accountability to design, participate in, and facilitate meetings to help groups to move from talk to action
- » Recognizing the already present resources, authority, and influence to bring one’s leadership to bear on the issues they care about

“Results-based leadership is the perfect marriage between the use of self as an agent of change and the principle of always working toward measurable results.”

– Donna Stark, former vice president of Talent and Leadership Development at the Annie E. Casey Foundation (Annie E. Casey Foundation 2013).



Designing Leadership Programs for Change

One successful strategy for building leadership capacity is bringing groups of leaders together to support the growth of leadership skills and abilities to align and focus their efforts, choosing one area, and building a sense of urgency from there. The first step is to look at the data to inform the current state as critical and create personal accountability for ongoing progress and monitoring. Also important is building capacity for working collaboratively with diverse groups and community partners toward common goals. Alignment on singularly focused goals is key to success (Annie E. Casey Foundation 2013).

The Alignment/Action Framework, in Figure 2.5, developed by the Results-Based Leadership Consortium (Pillsbury & Chawla, 2017), helps leaders determine their degrees of action and alignment.

Case Study: Annie E. Casey Leadership Program

Vision: All children in Maryland enter kindergarten ready to learn (49% in 2001)

First Leadership in Action Program (Annie E. Casey's program) sponsored by the Maryland Governor's Subcabinet for Children, Youth and Families launched in 2001, enlisting 40 leaders from government and the nonprofit sectors to engage in an intensive program of research, learning, dialogue and action. After 10 months, the group developed an "action agenda" for achieving school readiness that was adopted by the state legislature for implementation.

Outcome: 82% of Maryland children entering kindergarten ready to learn, 2012

Source: Maryland State Department of Education (Annie E. Casey Foundation 2013, p. 9)



Figure 2.5. Action-alignment 2x2 matrix

<p>HIGH</p> <p style="color: red; transform: rotate(-90deg);">Takes actions that contribute to results</p> <p>LOW</p>	<p>High action, low alignment A leader working actively and independently to contribute to the result, but not reaching out to build relationships with others to achieve complementary efforts.</p> <ul style="list-style-type: none"> • A leader acting on his or her own agenda • A leader uninterested in adapting to maximize impact 	<p>High action, high alignment A leader with resilient relationships acting on collaborative decisions and being accountable for measurably improving results.</p> <ul style="list-style-type: none"> • A leader implementing shared strategies • A leader working to strengthen relationships
	<p>Low action, low alignment A leader observing what is going on and not engaging in either relationship building or taking action that can contribute to the result.</p> <ul style="list-style-type: none"> • A leader sitting on the fence • A leader not connecting with others 	<p>Low action, high alignment A leader joining with others and fostering relationships, but not using the relationships to leverage contributions to the result.</p> <ul style="list-style-type: none"> • A leader not in action to implement strategies • A leader getting to know and connect with others
<p>LOW Works to be in alignment with others HIGH</p>		

Source: [Annie E. Casey Foundation 2013, p. 19.](#)

Leadership Development Frameworks

Rubrics can be an effective way to help leaders self-assess their practices and skill sets. You can use the earlier rubric in Figure 2.1 to ground the conversation with leaders on effective leadership skills and using an equity lens on their leadership. Another comprehensive tool you could reference is the LEAD Tool™ (Larson et. al. 2012). Other guiding questions to consider in regards to leadership and equity can be found on page 20, table 5 of the report “Equitable leadership on the ground: Converging on high-leverage practices (Galloway and Ishimaru 2017).”

Whatever tool you decide to use, the challenge is to fully engage leaders in discussions that build capacity for managing with a lens that takes into account the implications of race in the distribution of resources and opportunities. This lens has to involve both effective leadership strategies as well as setting a vision for managing equitable outcomes.



Figure 2.6 is a summary of the Principal’s Rubric from Oakland Unified School District’s leadership resources. It is also supported by the Leadership Practices Inventory® (Kouzes and Posner 1987). These resources offer guidance for leadership to support and develop leadership practices that focus on equity.

Figure 2.6. Summary of the principal’s rubric from Oakland Unified School District






Source: [Oakland Unified School District Leadership Task Force, p. 3.](#)

Managing Your Organizational Equity Journey

The process for incorporating equity systematically starts with the foundational steps outlined in Figure 2.7 (Hanover Research 2019, p. 8).



Figure 2.1. Foundation steps to systematically incorporating equity

 <p>ASSEMBLE AN EQUITY TEAM</p>	<p>Districts should assemble a team of stakeholders (e.g., administrators, staff, students, community members, parents, and/or school board members) that is responsible for overseeing the development and implementation of initiatives, practices, and policies aimed at improving equity within the district.</p>
 <p>EVALUATE CURRENT EQUITY PRACTICES</p>	<p>Districts should use guiding questions, audit tools, and implementation rubrics to understand where they currently are in terms of equity. This process often involves looking at district data to investigate how student outcomes vary across subgroups.</p>
 <p>DEVELOP AN EQUITY PLAN</p>	<p>After getting a clear picture of what the current state of equity is within the district, the district should develop an equity plan to target identified areas for development. Broadly, equity plans should outline strategies for improving educational equity, communicating about equity to internal and external stakeholders, involving stakeholders in the change process, and evaluating efforts made to improve equity. Districts should also consider how to prepare staff to be ready to implement the new practices outlined in the equity plan.</p>

Source: [Hanover Research 2019, p. 8.](#)

The first step in a journey is figuring out who is getting on the bus and where the bus is going. Who is planning the journey? Who is tagging along? What are the roles of the various stakeholders in the process? Hanover Research’s model outlines a simple way to frame the who, what, and how questions of starting the journey.

Any journey begins with pinpointing the destination, knowing your current location, and reviewing your method of travel. The equity journey is no different. It is natural to experience disorientation as you start this journey because, by its nature, an equity journey causes a reconsideration of all the assumptions and paradigms you have about mission-driven work. We tend to think of the military as operating on a simple premise that the mission is central and nothing else matters. A military objective seems purely focused on the outcome at any cost. The challenge when equity is at the center of a mission is that you cannot make the journey without the people, their engagement, and their ongoing reaffirmation of the journey, the cost, and the process. Even the military knows they cannot meet their objectives without building clarity of purpose and engagement of all its members. (Hanover Research 2019).

So, how do we engage the stakeholders in the mission, especially when it may mean going against patterns of historic practice and past wisdom? Without question, the adage from Maine, “You can’t



get there from here,” was never truer than in our journey to more equitable schools: The old pathways that have gotten us here will certainly not get us where we are going. The educational structures rooted in American history are replete with examples of exclusion and privilege. While it does not serve us well to dwell on the shame of our past, we ignore its lessons at our own peril. Rather than feeling bad about the past, we can double our efforts to make the future brighter and more inclusive. The chart in Figure 2.8 from LEAD Tools offers a rubric for visioning equitable practices.

Figure 2.8. Practice/rubric for visioning equity in schools or districts

Constructing and enacting an equity vision

This practice focuses on your leadership team’s capacity to develop a vision for equity in your school or district. An exemplary score here means the leadership engages in an inclusive process with the entire school community—particularly those traditionally marginalized in educational processes—to develop an explicit vision of collective responsibility for the educational success of each and every student. Leadership also explicitly recognizes inequities as systemic in nature, rather than as something rooted in individual children or their families. By modeling the vision in action, your leadership team demonstrates high expectations for educators and students, utilizing inclusive, democratic decisionmaking processes, and employing strategies for sustaining the vision and its enactment.


Little or No Equitable Practice	Emerging Equitable Practice	Proficient Equitable Practice	Exemplary Equitable Practice
<ul style="list-style-type: none"> The vision is developed based primarily on leadership’s own views. Leadership does not examine whether nondominant voices in the school community are heard, valued, or shape the vision. Leadership’s vision of achievement for “all students” does not explicitly focus on disparities that exist for nondominant students and families, or the systemic nature of these disparities. 	<ul style="list-style-type: none"> Leadership begins to articulate a vision that recognizes inequities as systemic in nature, rather than rooted in individual children or their families, and invites teacher and staff input on the vision. The vision considers the needs and achievement of federally defined student subgroups. Leadership begins to examine whether nondominant voices in the school community are heard, valued, or shape the vision, and has taken initial steps to incorporate nondominant perspectives into the vision. Leadership begins to develop teacher and staff collective responsibility for the educational success of each student. 	<ul style="list-style-type: none"> Leadership collaborates with teachers and staff to create and enact a vision that prioritizes eliminating systemic disparities by race, ethnicity, class, and/or home language. Leadership collaborates with teachers and staff to value and include the perspectives and priorities of nondominant students, their families, and their communities. Leadership has evidence that teachers and staff have collective responsibility for the educational success of each student regardless of background. 	<ul style="list-style-type: none"> Leadership engages in an inclusive process with the entire school community—particularly diverse groups—to develop a vision that prioritizes eliminating systemic disparities by race, ethnicity, class, and/or home language. The vision is collectively owned, and perspectives and priorities of nondominant students, their families, and their communities are central. Leadership models the vision in action, demonstrating high expectations for educator equitable practices and for student learning; leadership uses inclusive, democratic decisionmaking processes. Leadership employs strategies for countering resistance to sustain the vision and its enactment. Leadership has evidence that students, teachers, staff, families, and community members hold collective responsibility for the educational success of each student regardless of background.

Source: [Larson et al. 2012](#).

We will share examples of how you could do this well. First, those receiving the vision must want to believe it can be so or the examples of its success will seem infeasible, if not implausible. We will share examples of effective practice. Before you use them in the process of TA to support the redirection of the mission, check to ensure that there is a desire to believe in the possibility. If not, then start with building an image of a shared future that improves upon our current reality. This conversation begins with one question – how far do we dream we can improve? Figure 2.9 highlights the work of Denver Public Schools as it calls out the work of visioning for equity based upon careful diagnostics (Hanover Research 2019, p. 14). What would be our ideal for meeting the needs of those whom we serve? What do we want our system to become?



Figure 2.9. Three-step district-level framework to guide transformation, Denver, CO



DISTRICT SPOTLIGHT: DENVER PUBLIC SCHOOLS (CO)

Denver Public Schools (DPS) in Colorado partnered with Education Resource Strategies (ERS), a non-profit organization, to improve its district-wide equity. The district employed ERS' School System 20/20, "a framework to guide district transformation so that every school succeeds for every student because of the system."⁴⁴ The framework involves three steps:⁴⁵

- A **vision** of school system success, comprising key strategies that a district can use to initiate and support transformation.
- A **diagnostic** that includes qualitative and quantitative assessments to help districts measure and track their progress in creating the conditions that promote practices and resource use to support excellent instruction.
- A **process** for reviewing those assessments and collaboratively identifying changes to system conditions and practices that will lead to improved student performance.

This process illustrates the importance of evaluating a district's current equity practices and identifying areas for improvement. DPS focused on four key elements within the School System 20/20 framework: investing in leadership at all levels; recruiting, developing, and retaining high-performing teachers; managing high-performing district-run and charter schools; and providing high-quality, differentiated support to schools.⁴⁶

Source: [Hanover Research 2019, p. 14.](#)

Four Steps for Your Equity Journey

Step one: Identify where you want to go. Vision-making is an art that requires patience and planning. We do not easily dream of futures that we have not already apprehended. Compounded by fear of loss, failure, and our own inadequacy for the task, we do not easily step off the ledge into new unexplored futures. We can, however, learn to dream and join in the dreams of visionaries who open our eyes to new possibilities. Before apprehending the light of the new vision, it is natural to fear the darkness that precedes it. TA has to include the hand-holding required to step off into the abyss. We must expect the flailing and tendency for rejection since change can be as unpleasant as any birthing process. But once the vision is established deeply in the consciousness of the team that can move it forward, there is no stopping determined soldiers of change. Therefore, it is important to build consensus on the new vision.

Step two: Clarify where you are. Determine what the critical issues are that must be addressed through a focused conversation about the present challenges. Data review focused on the differential experience of various subgroups will be important here. While this could just as easily come as step one in any journey, it is placed second here because, unlike a drive to the country on a sunny Sunday, this journey benefits from the emotional boost of a well-articulated statement of purpose. A vision for the future that is inclusive, not frightening, invigorating, and plausible can go a long way to assuaging fears and existential concerns about losing historically cherished benefits



and access. Many states offer district assessments, albeit often when they are determining the possibility of a take-over or intervention. Nevertheless, these assessments are often invaluable to districts in the shaping of community-level mandates for change and district reform. They can provide dramatic and highly effective political cover for otherwise objectionable strategic necessities.

Step three: Decide how you want to get there. Some dramatic reformers (Lewin 2010) may want to sweep away their current team of teachers and start the system fresh with new staff, thinking that once remedied of the problem-people who stand in the way of reform that all will be well. These naive approaches, though good fodder for New York Times Magazine covers, ignore that the deeper problem the system faces is the system itself and not the people it employs. The system is built on ways of developing and motivating people that do not serve the needs of change. If we are not careful, these old habits will perpetuate themselves in current and new staff. (Brown, Strauss, and Stein 2018) Deciding how you want to get to the desired outcomes means contemplating what real change may look like, what leadership and system-level changes will facilitate the desired new direction, and how the culture of the organization has fostered the current outcomes. Deciding *how* means choosing a philosophical stance to change and a logic for change that encompasses clear thinking about the history and cultural drivers of the problems. James Collins, in his book, *Good to Great*, was right about the importance of getting the right people on the right bus and in the right seats (Collins 2001). We must make some changes to lead our people to challenge the past and build a better future. Leaders will need TA to meet this challenge, helping to build their capacity, tools, and processes so they can lead change. We can get them there by modeling strong leadership, clear vision, and effective organizational practice.

Step four: Ongoing maintenance can be supported by tools such as an Antiracism Audit (McKnight 2022). Montgomery County Public Schools in Maryland's Equity Initiative Unit is another example of an effective equity initiative providing a variety of tools. Careful progress toward equity requires ongoing attention. Using data from a variety of sources provides the necessary fuel for driving change.

After getting a clear picture of what the current state of equity is within the district, the district should develop an equity plan to target identified areas for development. Broadly, equity plans should outline strategies for improving educational equity, communicating about equity to internal and external stakeholders, involving stakeholders in the change process, and evaluating efforts made to improve equity. Districts should also consider how to prepare staff to be ready to implement the new practices outlined in the equity plan. The district equity team can be composed of stakeholders (e.g., administrators, staff, students, community members, parents, school board members) responsible for overseeing the development and implementation of equity initiatives, practices, and policies aimed at improving equity within the district. Figure 2.10 offers assistance in developing a theory of change which can serve as a guide for equity teams (Hanover Research 2019, p. 23).



Figure 2.10. District-level theory of change development guide



Theory of Change Development Guide

Description: Districts can use this process to evaluate their data, identify areas for improvement, and develop a theory of change. The resulting theory of change should inform the development of the district’s equity plan.

<p>STEP 1: IDENTIFY WHAT YOU WANT</p>	<p><i>Define Your Desired Equity Outcomes</i></p> <p>The first task is to produce an outcomes statement that specifies the racial or other disparities you would like to reduce or eliminate in a given place and timeframe. This process involves defining, as clearly as possible, the focus of your reform/change effort over the coming months and years.</p>
<p>STEP 2: SET YOUR PRIORITIES</p>	<p><i>Identify the "Building Blocks" of Your Racial Equity Outcome</i></p> <p>Unpack the big outcome from Step #1 into smaller building blocks so that you can be focused, realistic, and consistent in your planning and action.</p> <p>These building blocks will be your priorities since they are the essential preconditions for the change you want to see. You should frame them as the policies, regulations, information, resources, or anything else that must be in place, at a minimum, to support the outcome you want.</p>
<p>STEP 3: DETERMINE WHAT HELPS OR HINDERS YOUR BUILDING BLOCKS</p>	<p><i>Identify Public Policies, Institutional Practices, and Cultural Representations</i></p> <p>Now that you know where to concentrate your attention fruitfully, you must determine what supports or impedes your building blocks. This step is crucial for deciding the action agenda you will pursue to realize your ultimate goals.</p> <p>Apply a structural racism "litmus test" to each building block. For each one, you must identify public policies, institutional practices, and cultural representations likely to determine whether or not that building block materializes or stays in place.</p>
<p>STEP 4: IDENTIFY WHAT YOU MUST KNOW</p>	<p><i>Map the Local Change Landscape</i></p> <p>Now that you know what you want to accomplish and your strategic priorities, you must become familiar with the terrain that you and your colleagues will have to negotiate as change agents. You must understand the politics of change in your district—the "nuts and bolts" of power and governance.</p> <p>Learn how governance works in your school district. Find out where the critical decisions are made and what current and past alliances influence specific issue-areas. Without this knowledge, it will be hard to know where and how to intervene to make a change.</p>
<p>STEP 5: DETERMINE THE ACTIONS YOU MUST TAKE</p>	<p><i>Assess Your Capacity, Planning, and Gearing Up for Action</i></p> <p>Now you can see that the work of equity involves taking actions to change or support a specific set of building blocks, most often in collaboration with others. These actions must target those who most influence the characteristics of those building blocks in your school district.</p>

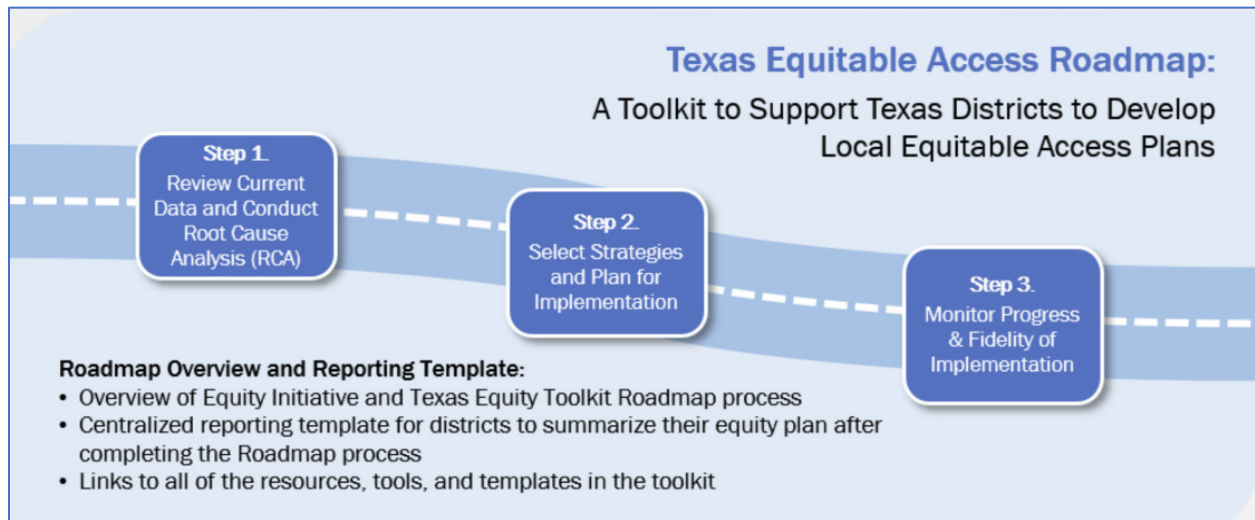
Source: [Hanover Research 2019, p. 23.](#)



A state example of using a roadmap

Texas shows another example of mapping out your equity journey, in Figure 2.11 (Texas Education Agency (TEA) 2022). Like every state, Texas offers its roadmap, its *Every Student Succeeds Act* (ESSA) plan, and its equity resources.

Figure 2.11. Pragmatic three-step state-level equity roadmap, Texas



Source: [Texas Education Agency 2022](#).

Like most states, Texas developed an equity plan in response to ESSA and submitted that plan to the U.S. Department of Education (TEA 2018).

ESSA consolidated plans for each state were submitted to the U.S. Department of Education and are available online (U.S. Department of Education 2017).

Equity Plan Development Checklist

Once you have created your plan and begun your implementation, you can use checklists to review whether you are taking all the important areas of concern in hand. A checklist for your equity planning can help you orient your team around the key steps in the process. Although there are many tools presented in this report, you need to identify the particular tools that will fit well in your environment, for this moment in time, and for the particular team that you are working with. An example of a useful checklist is the Equity Plan Development Checklist developed by the Colorado Department of Education. (See Figure 2.12 below; Hanover Research, p. 19)



Figure 2.12. Example of equity plan development checklist, Colorado Department of Education

 Equity Plan Development Checklist	
GOALS FOR IMPROVEMENT OR CHANGE	<input type="checkbox"/> Address the emotional aspects of equity, racism, and discrimination <input type="checkbox"/> Integrate educational equity throughout the entire curriculum and school climate <input type="checkbox"/> Identify areas for change needed to achieve equity <input type="checkbox"/> Determine how to evaluate progress
PROFESSIONAL DEVELOPMENT FOR TEACHERS AND STAFF	<input type="checkbox"/> Develop cultural competence and cultural proficiency <input type="checkbox"/> Examine biases, norms, and values <input type="checkbox"/> Work on school goals for improvement or change
COMMUNICATION STRATEGY	<input type="checkbox"/> Determine audience – students, school personnel, parents, community <input type="checkbox"/> Encourage open dialogue and honesty <input type="checkbox"/> Articulate goals and messages <input type="checkbox"/> Clearly define roles and responsibilities <input type="checkbox"/> Use purposeful conversation
STRATEGIES TO RESOLVE A SPECIFIC DISCRIMINATION EVENT	<input type="checkbox"/> Acknowledge the incident and determine the impact on the parties involved <input type="checkbox"/> Contact parents and use purposeful conversation regarding the incident <input type="checkbox"/> Whole school discussion on causes/impacts <input type="checkbox"/> Larger community discussions
PARENTAL INVOLVEMENT	<input type="checkbox"/> Make parents feel welcome at school <input type="checkbox"/> Include parents to give them ownership of the equity plan <input type="checkbox"/> Share research showing increased academic achievement of children whose parents are involved in their school <input type="checkbox"/> Communicate regularly on the progress of the plan in school newsletters
COMMUNITY ENGAGEMENT	<input type="checkbox"/> Invite community leaders to discuss issues and goals <input type="checkbox"/> Engage the community as a problem-solver <input type="checkbox"/> Include community members to build their ownership of the equity plan
EVALUATION	<input type="checkbox"/> Determine how to assess whether goals and objectives are being met <input type="checkbox"/> Develop a timeline <input type="checkbox"/> Create benchmarks

Source: [Hanover Research 2019, p. 19.](#)

Improvement Planning Guide

Improvement planning can take many forms. Different groups have devised models that help focus on the issues they care about. Coalition of Schools Educating Boys of Color (COSEBOC) uses a model, which is sampled in Figure 2.13 below (COSEBOC 2015).



Figure 2.13. Example of improvement planning guide, COSEBOC

CORE AREA	4	<i>School Climate is the social atmosphere of a setting or learning environment in which students have different experiences, depending upon the protocols set up by the teachers and administrators. School climate refers to the quality and character of school life as it relates to norms and values, interpersonal relations and social interactions, and organizational processes and structures.</i>						
	SCHOOL ENVIRONMENT AND CLIMATE	PERFORMANCE LEVEL		PLAN TO IMPROVE			EVIDENCE	
<i>School Quality Indicators:</i>		1	2	3	4	Right Now	This Year	Next Year
A Quality School and School Program has:								
4. School Culture Activities that:								
a. Intentionally develop cognitive (intellectual interest), behavioral (concrete strategies doing school well), and relational (adult attention to each child) engagement strategies.								<i>Examples: character education programs that intentionally build resilience and other coping skills; advisory schedules; classroom displays of expected norms</i>
b. Intentionally enhance coping skills such as resilience, perseverance, and emotional management								

Source: [COSEBOC 2015, p. 25.](#)

An equity journey map can support your efforts by providing specific benchmarks. Critical practices can include:

1. Take time to cultivate and deepen relationships, build partnerships, and plan for equity
2. Design opportunities where adults can connect, heal, and build their capacity to support students and learn about the impact of equity issues on students
3. Create safe, supportive, and equitable learning environments that promote all students’ social and emotional development
4. Use data as an opportunity to share power, deepen relationships, and continuously improve support for students, families, and staff
5. Investigate the culture and organization for areas of concern to identify target areas to improve.

No matter what topics or areas of improvement arise, these steps can help facilitate healing, connection, and action.

In summary, leadership begins with an acknowledgment that we are all on a personal journey and must begin with reflection and personal growth. Specific competencies are important for equity leadership, including cultural and equity-related competencies. Having a sense of the roadmap that can guide your journey can give you a starting place and benchmarks to support your planning and implementation. You can deploy these plans and skills to impact numerous topics and challenges, depending on your circumstances.



Chapter Three: What is Happening in the Field?

Sometimes, managing improvement in education can feel like trying to hit a constantly moving target. Many emerging trends and new resources will be helpful in the journey toward excellence for schools. States and districts that can explicitly call out issues of race and equity can more directly apply tools and strategies to improve. Other schools may need to retrofit tools and lessons learned to the realities on the ground at present.

The “racial awakening” in America spawned national concern for equity issues in many aspects of American life. It also created an undercurrent of discomfort manifested by efforts to suppress activity designed to focus on race and equity issues. The push to limit or eliminate professional development that focuses on culture, race, and any seemingly progressive ideas has created obstacles for districts interested in tackling pervasive achievement issues for some students. Perceptions that the “radical left’s agenda” allegedly includes Critical Race Theory in K-12 curricula have made discussions about equity tenuous at best (Meckler 2022). Critical Race Theory is not something that would be taught to Kindergarten students, as some may fear. As a framework that is designed to interrogate systems and the historical roots of racial prejudice in American institutions, Critical Race Theory has not formally made its way into K-12 curricula. Nevertheless, such outcries have raised significant points of tension, making it difficult to pursue equity issues directly in some parts of the United States. Teachers are struggling to teach anything that investigates the history of institutional racism, not to mention anything that is critical of U.S. history or culture in general. But until race no longer impacts outcomes in education, it will need to be taken into account.

What are educators to do when issues of racial discrimination are all but prohibited from public discourse (Pendharkar 2022; Ray and Gibbons 2021; Schwartz 2021; Sykes, Emerson, and Hinger 2021)?

How can we undo the historical patterns of exclusion and under-servicing of marginalized people when their plight and patterns of disenfranchisement cannot be openly acknowledged, prioritized and addressed, including health (Osei Baah, Teitelman, and Riegel 2018), privacy (Gilman and Green 2018), voting (Human Rights Watch and American Civil Liberties Union 2022), education, and the continued federal government’s “march” towards International Convention on the Elimination of All Forms of Racial Discrimination (ICERD) compliance since 1966 (Human Rights Watch and American Civil Liberties Union 2022), to name only a few?

If schools functioned effectively as an agent of effective education for all students, we would have no need for an explicit agenda on race or solutions for inequities in our systems. So, the priority is to get our schools to function at a healthy level where excellence is available for any student who comes through the door. An effective strategic agenda that creates a well-run school system would, in theory, address any historic inequities and current underperformance issues. In the absence of a public equity agenda, the next best strategy is a well-run district that meets the needs of all students. If this can be done without referring to race, privilege, or systemic oppression, then such



systems will model effectiveness for others. Where bias is involved, it will have to be addressed eventually if change is expected.

At the State Level

In response to ESSA requirements, some states are doing a great job in designing their vision and mission, to embed their equity principle, and some show how they're aligning with ESSA measurement requirements and reporting indicators. Here is an example of how West Virginia is fleshing out its strategic vision for improving its outcomes (West Virginia Department of Education 2021).

Figure 3.2. Example of equity-considered state-level vision statement, West Virginia

OUR VISION

- To provide effective and equitable access to high-quality learning opportunities to empower West Virginia students to:
- *develop and demonstrate the **knowledge and skills** to maximize their intellectual and personal potentials;*
 - *encourage and promote a culture of responsibility, personal health, and social-emotional well-being to become engaged **community** members; and*
 - *anticipate and prepare for the future with a pathway to **workforce** readiness.*

Source: [West Virginia Department of Education 2021](#).

Many states have set out to create mandates to improve educational outcomes, reduce disparities, and eliminate disproportionalities. As stated earlier, the best solution to equity issues is a well-run system that privileges everyone and creates equitable access to opportunities and growth. West Virginia's mission and goals are shown in Figure 3.2, where it sets as its number one goal to "Lead a Thorough, Efficient, and Effective Educational System." It continues on to state as part of its goal, to "Create Access and Equity to West Virginia's Public Education System" (West Virginia Department of Education 2021).

"The West Virginia Department of Education was charged with developing an ESSA state plan to articulate how West Virginia will strengthen and support student achievement. The major components of the ESSA state plan address school accountability and support for improvement, academic standards and assessment, support for excellent educators, and support for all students. West Virginia's plan is a comprehensive, individualized system of support that will utilize education partnerships to promote student growth."

–West Virginia Department of Education 2021.



Figure 3.2. Example of comprehensive, equitability-based, state-level mission and goals, West Virginia

OUR MISSION

The **West Virginia Board of Education (WVBE)** and **the West Virginia Department of Education (WVDE)** work collaboratively to establish policies and procedures to promote equitable implementation of the WVBE's education goals and the general supervision, oversight, and monitoring of a thorough, efficient, and effective system of free public schools.

Goal 1. Lead a Thorough, Efficient, and Effective Education System

- » Create Access and Equity to West Virginia's Public Education System
 - Develop policy, funding, and legislative collaboration
 - Partner with schools, communities, institutions of higher education, state/federal agencies, and businesses
 - Facilitate access to technology, connectivity, and innovative practices

Goal 2. Improve Student Achievement and Accountability

- » Provide Access to Student Achievement and Accountability Resources/Data to County School District Staff
 - Offer technical support to counties on data-driven, evidence-based best practices to improve student performance
 - Gather, interpret, and report student achievement and accountability data
 - Create data for county boards of education to utilize in responsible local decision-making

Goal 3. Develop Economic Preparedness of Students

- » Advance the Three Post-Secondary E's: Education, Employment, and Enlistment
 - Increase school readiness and achievement
 - Expand college readiness, career readiness, workforce readiness, and entrepreneurship
 - Support military career options

Goal 4. Expand the Number of High-Quality Educators and Leaders

- » Elevate Educator Preparation, Recruitment, Retention, and Professional Learning
 - Research and implement effective educator recruitment strategies, such as multiple pathways to teacher licensure
 - Collaborate with Institutions of Higher Education
 - Invest in professional learning opportunities for educators and leaders

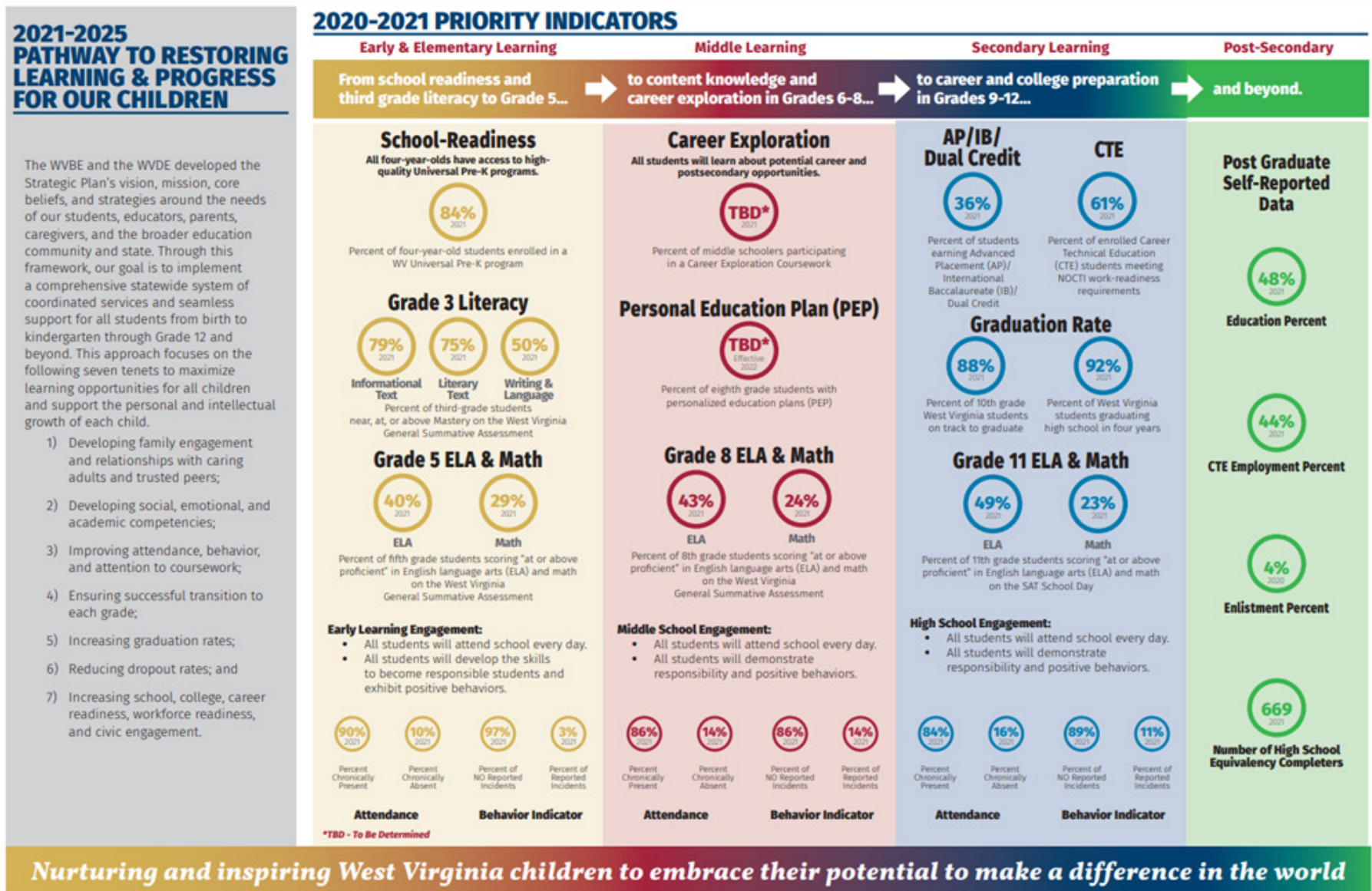
Source: [West Virginia Department of Education 2021](#).

West Virginia's student performance data presents a clear need for intervention in response to low performance in key target populations. Student readiness is high relative to elementary performance, indicating the need for strengthening core functions within the education system. West Virginia outlines a vision, a comprehensive plan to build workforce readiness, shown in Figure 3.3, and guiding core beliefs and key strategies, shown in Figure 3.4.

As long as the system is not hampered by systemic biases that are likely to have caused historic underperformance, then the creation of a well-run system itself will significantly benefit all learners and leave none behind.



Figure 3.3. Example of comprehensive 5-year, educator workforce readiness state-level plan, West Virginia



Source: West Virginia Department of Education 2021, p. 2-3.

Figure 3.4. State key strategies and core beliefs, West Virginia Board and Department of Education 2021 Strategic Plan for Public Schools

CORE BELIEFS:

We believe all West Virginia students can succeed when led by effective, well-trained educators in supportive, safe, and adequately funded learning environments.

- ▶ We believe this vision for students is achieved through equitable, sustained support of a thorough and efficient public school system focusing on the West Virginia Standards for Effective Schools.
 - 1. Clear, Focused, and Shared Mission**
Definition: Supporting the school's purpose and approach for learning for all.
 - 2. Instructional Leadership**
Definition: Ensuring that the effectiveness of instruction leads to student achievement.
 - 3. High Expectations for Success**
Definition: Purposefully providing a climate in which all students can learn and succeed.
 - 4. Positive and Safe Environment**
Definition: Promoting an orderly, purposeful, and accommodating environment for all students.
 - 5. Equitable Opportunities to Learn and Effective Instruction**
Definition: Providing sufficient time for meaningful learning to all students.
 - 6. Frequent Monitoring of Student Progress**
Definition: Using a variety of data as the basis for adjusting instructional approaches to ensure the successful completion of all core beliefs.
 - 7. Family and Community Partnerships**
Definition: Promoting purposeful relationships exist between families, community, and the school.
- ▶ Educational Equity in West Virginia public schools is the belief that our state education system and all of those within its purview have the duty and responsibility to create environments, provide access and structure supports for the individual child that will assist them in their social/emotional/academic growth, regardless of the child's identity or background. As the WVBE and the WVDE, we implement policies, programs, and structures to focus and target attention to address and eliminate educational gaps.

Source: [West Virginia Department of Education 2021, p. 4-5.](#)

KEY STRATEGIES

To fulfill the WVBE Strategic Plan, the WVDE works with county school districts to provide equitable access to quality educational opportunities and to build capacity across classroom settings, grade levels, schools, and communities. From a nationally-recognized early learning environment to nationally-recognized workforce and Simulated Workplace environments, the WVBE/WVDE has developed three key strategies to revitalize and drive the vision, mission, goals, and core beliefs of the West Virginia Strategic Plan. These broad and over-arching strategies are as follows:

Provide Evidence-Based Best Practices with Fidelity

The WVDE will provide evidence-based best practices and resources to address school, college and career readiness, workplace readiness, and achievement to ensure access to a strong system of support for all students. To ensure equitable access to high-quality instruction, the WVDE will use a variety of delivery methods to promote effective, ongoing professional learning that will include such topics as grade-level content and pedagogy, social and emotional awareness, mental health, special education, CTE, entrepreneurship, STEAM, adult learning, and integrated tiered system of academic and behavioral supports.

Apply Data-Informed Decisions

The WVDE will increase the capacity to make data-informed decisions at the state and local levels by providing access to student data (including formative evaluations, observational and anecdotal documentation, self-reported data, interim, and summative assessments) and professional learning to ensure a strong system of support. The data is designed to be user-friendly and available for data-based decision-making. The WVDE will offer customized data analysis to local school districts to incorporate into their decision-making process.

Engage Informed Partnerships

The WVDE will create and sustain partnerships to ensure a strong system of support for all students. The WVDE will: 1) engage in strategic collaboration with county school districts, state, regional, and national agencies that support student well-being, workforce readiness, and post-secondary opportunities; 2) promote legislative partnerships through collaborative efforts to support, fund, and improve the West Virginia public education system; and 3) encourage school, community, healthcare, institutions of higher education, and business partnerships to motivate school and family efforts to make informed decisions that contribute to children's success and overall economic well-being.

To review the WVDE data, please visit wveis.k12.wv.us/essa.

These documents articulate the aspirations of each state as it grapples with the challenge of managing disproportionate performance levels of marginalized groups. Despite the political unpopularity of equity in some states, many are laying out guidelines for effective practice at the state and local levels that could remedy the equity issues if implemented without bias.

At the District Level

A variety of models and strategies have emerged to respond to critical issues. In Boston, an analysis done by Ernst and Young on high schools, in terms of how students managed in public exam schools, charter schools, and open-enrollment schools, demonstrated an analytical strategy for how to break down the data into actionable chunks. It emphasized the need for systemic analysis of the factors that clearly and predictably advantaged some students and not others. The data does not ensure the problem will be solved but it makes the issues transparent and available for action. In Newark, NJ, the need for a culturally responsive curriculum led to a comprehensive study of the status and cultural relevance of the curriculum and the systemic factors that caused it to become unrepresentative of and out of line with the needs of the current student population (Wells 2018). The data highlight the challenges and opportunities for improvement. In the right hands, data can drive dramatic changes. Often, it falls prey to the political maelstrom that exists in many states and districts, making it hard to see, not to mention to resolve, the underlying problems that drive the data.

As districts work towards **designing equity plans**, SEAs can draw on the many examples and current practices of their peers in other states and leading districts to guide them. Two such examples are presented in Figures 3.5 and 3.6.

Figure 3.5. Example of district-level equity initiative in a school, Chandler, AZ

The graphic features a light blue background with a dark blue border. At the top left is a lightbulb icon with a gear inside. To its right is the title "DISTRICT SPOTLIGHT: CHANDLER UNIFIED SCHOOL DISTRICT (AZ)" in dark blue, all-caps font. Below the title is a paragraph of text in black font. Underneath the paragraph is a bulleted list of three items. At the bottom of the graphic is another paragraph of text.

DISTRICT SPOTLIGHT: CHANDLER UNIFIED SCHOOL DISTRICT (AZ)

Chandler Unified School District (Chandler USD) in Arizona hired a Director of Equity and Inclusion to lead the district's equity initiative, called the Deep Equity Initiative.³⁵ The district is focused on improving equity in academics and discipline. The newly hired Director stated three areas in which the district needed to focus to improve its equity:³⁶

- Teachers need to reflect on their implicit biases and beliefs about people of different backgrounds;
- The district needs to review its policies and practices to see how its disciplinary practices might be inequitable and identify how it could strive for more objective discipline; and
- The district needs to review its curriculum and instruction to identify areas in which the district could offer more equitable instruction.

The Director of Equity and Inclusion plans to create an equity advisory board to lead the implementation and evaluation of initiatives around these three areas. Further, each school in the district has an equity team that will be trained on recognizing implicit biases and fostering educational equity. The Director of Equity and Inclusion would also like to "start a film and lecture series about diversity and equity" and develop "an annual equity institute for teachers and the public."³⁷

Source: [Hanover Research 2019, p. 11.](#)

<https://region5compcenter.org>

Figure 3.6. Example of district-level strategies for an equitable school

CRITERIA FOR AN EQUITABLE SCHOOL

An equitable school provides the climate, process, and content which enable students and staff to perform at their highest level. An equitable school ensures successful academic outcomes by providing equitable resources and appropriate instructional strategies for each student. The equitable school:


- Has a clear mission which is committed to equitable access, processes, treatment, and outcomes for all students, regardless of race, gender, national origin (English learners), disability, or socioeconomic status;
- Provides an inclusive visual environment – halls, displays, and classrooms exhibit pictures and information about diverse students and cultures;
- Reflects and works in collaboration with the various socioeconomic, racial, ethnic, language, gender, and disability groups within the school community; and
- Works in partnership with parents, the business community, and civic and community organizations to enrich the curriculum, provide consistently high expectations for all students, and develop supports and opportunities for all students.

Source: [Hanover Research 2019, p. 15.](#)

In the **Chicago Public Schools Equity Report**, a systematic analysis of current practice creates the basis for action in response to several key equity issues, including engagement, climate, leadership, learning, access, and fiscal, among others (Chicago Public Schools n.d.).

The Hamilton-Wentworth District School Board in Ontario, Canada, equity guide is another example, shared in Figure 3.7, of the stepwise process a district can use to pursue educational equity (Hanover Research 2019).

Figure 3.7. Example of district-level content and development of an equity guide, Hamilton, Canada



**DISTRICT SPOTLIGHT: HAMILTON-WENTWORTH DISTRICT
SCHOOL BOARD (CANADA)**

Hamilton-Wentworth District School Board (HWDSB) in Ontario, Canada developed an **Equity Guide** to help its schools foster educational equity. The guide covers the following areas: school climate/physical environment, leadership, school-community partnership, curriculum, student languages, assessment, counseling and support, and harassment and bullying prevention. For each area, HWDSB developed:⁵⁸

- A guiding principle that outlines the work to be done in the area;
- The theory and context underlying the guiding principle;
- Guiding questions to facilitate an examination of the school’s practices as they related to the guiding principle; and
- An organizer that displays the expected outcomes and their associated strategies to be implemented, relevant initiatives, and relevant resources.

Source: [Hanover Research 2019, p. 21.](#)

At the Classroom Level

While this report focuses more on state and district issues, the challenge of building capacity for supporting equity at the classroom level is parallel to those at the state level. Figure 3.8 shares characteristics of an equitable classroom, which is a general reflection of an overall school environment. Organizational capacity building is needed to build cultural proficiency, which can drive greater clarity on the equity issues that plague districts. Human capital requirements are similar in that the need for diverse staff is vital at state and local levels to balance perspectives, experiences, and diverse voices. This raises the importance of training staff in cultural competence, which can ensure that teachers connect with students and minimize performance gaps that may result from limitations in teacher capacity and cultural awareness. Supporting staff in building the cultural relevance of instruction also contributes to student performance and experience. Hiring diverse staff also supports efforts to manage equity and improve student experience. The Division of Elementary and Secondary Education (DESE) Equity Assistance Center offers a Teacher & Administrator Recruitment & Retention Plan designed to promote recruitment and retention of minority races and ethnicities to increase diversity among the district staff and, at a minimum, reflect the racial and ethnic diversity of the district's students (DESE Equity Assistance Center 2022b; Arkansas Department of Education 2022).

Figure 3.8. Example of criteria for an equitable classroom

CRITERIA FOR AN EQUITABLE CLASSROOM
An equitable classroom reflects the overall school environment and is characterized by: <ul style="list-style-type: none">▪ An inclusive climate and visual environment;▪ Multicultural and culturally responsive pedagogy, curricula, and materials;▪ A wide variety of instructional strategies to meet differing learning styles and backgrounds;▪ Utilization of student funds of knowledge and outside resources to provide diverse tools, strategies, and role models;▪ Availability of extracurricular activities to enrich the curriculum and provide multicultural experiences;▪ Active outreach to and substantive involvement of parents/families from all groups in varied aspects of the educational program, both planning and instructional; and▪ Recognition of multiple intelligences and student strengths through academic opportunities, honors, leadership roles, and creative options.

Sources: [Hanover Research 2019, p. 16.](#)

Leading Practices

Each state is responsible for articulating how it will follow state and federal guidelines. In most states, there is clear legislation compelling compliance with state and federal policies for implementing and monitoring equity. In Arkansas, for example:

Arkansas Code Annotated § 6-10-111(d) requires each school district or charter school to annually report to the Arkansas DESE Equity Assistance Center regarding its compliance with civil rights responsibilities, which is



documented in the Equity Compliance Report (DESE Leadership Support Service n.d.).

This coincides with federal statutes from the Office for Civil Rights of the U.S. Department of Education, which is responsible for enforcing Title VI. However, the role of the DESE Equity Assistance Center is to provide TA to school systems concerning Title VI.

Each state has to define best practices and offer guidance as to how to select those practices. DESE's Empowering Schools for Success: Using Effective Evidence-Based Practices to Impact Student Outcomes (Arkansas Division of Elementary and Secondary Education 2021) outlines what evidence-based practice looks like using ESSA's five levels of criteria. One tool used especially by charter schools is the DESE Equity Assistance Center Diversity and Inclusion Practices Guide (Arkansas Division of Elementary and Secondary Education, Equity Assistance Center. (2022, January) which outlines questions for consideration when understanding equity issues and setting goals as well as recruiting and retaining a diverse staff while amplifying students and family engagement. It can also be used as a template to guide teams in prioritizing and identifying gaps between their student diversity/inclusion current reality and goal.

Another useful tool that is common for states is its data center. **Arkansas' Statewide Data Center** houses the latest high-level performance "Report Card" for the state or any school (Arkansas Department of Education 2022). Naturally, the power of any state's data center and data itself is dependent on the TA that helps bring the data to life. Arkansas created its own state-level Equity Assistance Center (EAC) as an intermediary between the State Department of Education and the Regional EAC. It helps by providing resources, training, and guidance on practices around diversity, equity, and inclusion (DE&I) and compliance with the Regional EAC and the Office of Civil Rights requirements (Arkansas DESE- Equity Assistance Center).

The state-level EAC also administers a statewide Equity Compliance Report that each school district or charter school must annually report to the state-level DESE Equity Assistance Center regarding its compliance with civil rights responsibilities.

Foundations

Foundations operate more in line with the private/corporate model of supporting DE&I in their work with their stakeholders. They also offer DE&I support tools and ideas that have led them to success. Annie E. Casey and W.K. Kellogg Foundations, for example, consistently and publicly offer inclusivity-based and equity-based tool sets, frameworks, and strategies that have served them well in their organizations. They also do well partnering with consulting firms or advocacy groups to continuously learn and develop their processes. A number of their resources are embedded in this report.

Partnerships & Alliances

While there are a great number of resources available to or designed by the states, it can feel like a minefield to navigate. There are many opportunities across states to collaborate with other



organizations, like foundations. This often leads to sharing across states resources, reference materials, guides, and strategies that may be useful. The dialogue also provides very healthy discussions and roundtables around the efficacy of various strategies. One example is The Kellogg Foundation’s partnership with Equivolve Consulting for sharing out the strategies and supporting actions that researchers, evaluators, and funders can take to advance equity for boys and men of color. Another is the Tennessee Department of Education, which formed an alliance with Vanderbilt University aimed at producing research studies to inform the state’s school improvement efforts. “The Tennessee Education Research Alliance (TERA) bridges the gap between research, policy, and practice. The partnership-focused approach places research in the hands of education leaders tasked with finding policy and practice solutions” (TERA–Vanderbilt Peabody College 2022).

The Ohio Department of Education partnered with Proving Ground at the Center for Education Policy Research at Harvard University. Proving Ground identifies and tests solutions to challenges brought in by the department. Proving Ground’s role is to help district officials, by trying out different approaches to challenges and analyzing data to determine how well strategies are working (Proving Ground 2022).

These are just a few of the leading practices, partnerships, and groups that are working on improving outcomes with equity in mind. Next, there are a variety of frameworks and methodologies that can be used to guide your equity work.



Chapter Four: Methodologies & Frameworks

General Frameworks and Models

The following frameworks and models are resources that may enhance your planning processes. Some of them are standard practices and they are placed here to ensure you can use them if needed.

Logic Models

The Kellogg Foundation offers a guide for the development of logic models (W.K. Kellogg Foundation 2004). Logic models can be helpful in articulating the focus, purpose, and activities of your equity work to clarify program outcomes and outputs. They show the relationships between the various components of the work, linking them together in a manner that makes them defensible and intelligible. A logic model is particularly useful for identifying the aspects of the plan that do not make sense because they do not enhance the logic or the rationale for a particular element.

Theory of Change

A good theory of change (ToC) can clarify what needs to happen and why, for a desired outcome. It will explain how change towards the outcome is expected to happen and how change is understood. Like the logic model, its goal is clarity. In the case of the theory of action, described below, the clarity is around how change happens in a specific situation. Explaining how change happens offers a space to articulate why the actions you have decided to take in your logic model can reasonably be expected to have the desired outcome. How will people respond to the intervention model? What needs will it help manage? How and why will the outcomes be sustainable?

Figure 4.1, below, shows a practical example of an equity-centered ToC guide in use by the Aspen Institute Roundtable. Their full ToC can be found in their “Advancing the Mission: Tools for Equity, Diversity and Inclusion” 2009 report, (Annie E. Casey Foundation 2009, p. 43).



Figure 4.4. Steps to develop an equity-centric ToC

 Theory of Change Development Guide	
STEP 1: IDENTIFY WHAT YOU WANT	<p><i>Define Your Desired Equity Outcomes</i></p> <p>The first task is to produce an outcomes statement that specifies the racial or other disparities you would like to reduce or eliminate in a given place and timeframe. This process involves defining, as clearly as possible, the focus of your reform/change effort over the coming months and years.</p>
STEP 2: SET YOUR PRIORITIES	<p><i>Identify the "Building Blocks" of Your Racial Equity Outcome</i></p> <p>Unpack the big outcome from Step #1 into smaller building blocks so that you can be focused, realistic, and consistent in your planning and action.</p> <p>These building blocks will be your priorities since they are the essential preconditions for the change you want to see. You should frame them as the policies, regulations, information, resources, or anything else that must be in place, at a minimum, to support the outcome you want.</p>
STEP 3: DETERMINE WHAT HELPS OR HINDERS YOUR BUILDING BLOCKS	<p><i>Identify Public Policies, Institutional Practices, and Cultural Representations</i></p> <p>Now that you know where to concentrate your attention fruitfully, you must determine what supports or impedes your building blocks. This step is crucial for deciding the action agenda you will pursue to realize your ultimate goals.</p> <p>Apply a structural racism "litmus test" to each building block. For each one, you must identify public policies, institutional practices, and cultural representations likely to determine whether or not that building block materializes or stays in place.</p>
STEP 4: IDENTIFY WHAT YOU MUST KNOW	<p><i>Map the Local Change Landscape</i></p> <p>Now that you know what you want to accomplish and your strategic priorities, you must become familiar with the terrain that you and your colleagues will have to negotiate as change agents. You must understand the politics of change in your district—the "nuts and bolts" of power and governance.</p> <p>Learn how governance works in your school district. Find out where the critical decisions are made and what current and past alliances influence specific issue-areas. Without this knowledge, it will be hard to know where and how to intervene to make a change.</p>
STEP 5: DETERMINE THE ACTIONS YOU MUST TAKE	<p><i>Assess Your Capacity, Planning, and Gearing Up for Action</i></p> <p>Now you can see that the work of equity involves taking actions to change or support a specific set of building blocks, most often in collaboration with others. These actions must target those who most influence the characteristics of those building blocks in your school district.</p>

Source: [Hanover Research 2019, p. 23.](#)

Theory of Action


A theory of action (ToA) articulates the relationship between each key action in your plan. Your logic model describes what you plan to do and the rationale behind your actions. Your ToC explains why the outcomes are reasonable to expect. Your ToA clarifies the relationship between your beliefs and your actions. It drills down in even greater detail, demanding that if you hold certain principles then you must take a certain action to bring about the required outcomes.



An example of a complete ToA is West Virginia’s Educator Equity Plan, which focuses on access to excellent teachers (West Virginia Department of Education 2014). If a comprehensive approach to continuous improvement—in particular for low-income, high minority, and high-need schools and districts—is implemented carefully and its implementation is monitored and revised as data warrants, then West Virginia school districts will be better able to recruit, retain, and develop excellent educators and administrators such that all students have equitable access to excellent teaching and leading to help them become college and career ready upon graduation from high school.

Another example, in summary, of an equity-focused ToA is found below in Figure 4.2, for Boulder Valley School District. It builds on the ToA summary formula of “If... Then...” phrasing and focuses on the process. Similar examples of ToAs for other school districts and states can be found in “Theory of Action; Samples from States and Districts” by the New York State Education Department (New York State Education Department 2018). In a broader summary format, a ToA takes the form of: “If we do this thing/these things...Then we will see that happen...which will lead to this...and which will result in that outcome that we want to see.” Here, the ‘outcome’ generally refers to the outcome in a given situation, tied to your ToC.

Figure 4.2. Summary example of a district-level ToA, Boulder Valley, Colorado



DISTRICT SPOTLIGHT: BOULDER VALLEY SCHOOL DISTRICT (CO)

Boulder Valley School District (BVSD) in Colorado drafted an [Equity Theory of Action](#) in the 2013-14 school year. The district’s theory of action is as follows:⁶³

If we believe that culturally responsive and equitable practices will enhance the daily work, environment, and lives of students, staff, parents, families and community members, then we must make equity central to our **daily practice and work**.

Equity occurs in our interaction and relationship development with students, staff, parents, families, and community members, and in advancing equitable instructional practices and an inclusive organizational culture. Equity must be the **fundamental work** of the Boulder Valley School District to ensure the success of the entire BVSD community.

The district used the theory of action to draft a mission statement, value statements, and three distinct district-wide goals pertaining to the implementation of equity.⁶⁴

Source: [Hanover Research 2019, p. 24](#).

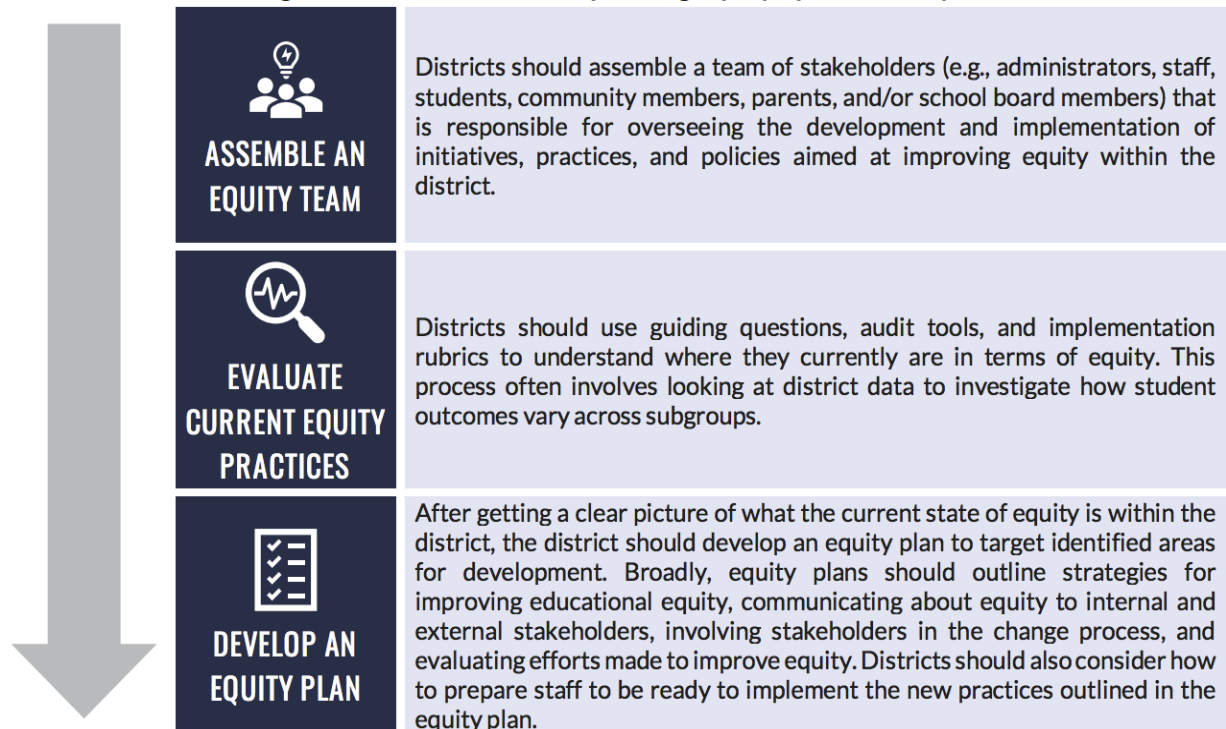
Planning an Equity Journey

Getting started on your equity journey can be the hardest part. As stated before, West Virginia’s simple model in Figure 4.3 offers a suggestion for where to get started. To elaborate further, you need to vest the responsibility for managing the journey towards greater equity in a strategic place in the organization. Setting up an equity officer can be very useful. Setting up the role of managing



for equity in a role that has line authority is even more powerful, stable, and influential. Finally, embedding equity into every role, in particular, in the lead roles in an organization, will ensure that everyone sees their role in moving forward the equity agenda. In places where equity is a nonstarter, it is important to embed the functions of equity in every role. Then, everyone has responsibility for ensuring that no child is left behind and that the system functions to serve whoever is in its purview without bias or favoritism. This can be more challenging to do without accountability measures calling out equity goals if the system has historically underperformed with specific populations. It assumes that high performance can be achieved without calling out the historical patterns and reasons for neglecting certain needs. It requires that leadership can articulate what “do your job” means to each department and hold them accountable for neglecting service to needy populations. To the argument, “I treat everyone equally,” the response needed is “equal treatment will not be enough to remedy historically underserved needs.”

Figure 4.3. Process for incorporating equity systematically



Source: [Hanover Research 2019, p. 8.](#)

Each state and district needs a team who will monitor and evaluate progress toward equity. They also need strategies and authority to step in when the system fails to effectively remedy equity issues. They need to support the dialogue at all levels about what the problems are. It cannot be assumed that the issues will be uncovered and resolved on their own or they would have been fixed long ago. A plan is needed to articulate the journey from here to there. And where there is a plan, it needs careful dialogue and consensus-building to create buy-in and collective resolve. A variety of methods and frameworks can be useful for such a team as they prepare to build capacity, consensus, and clarity of vision. We outline a sample of those tools below.

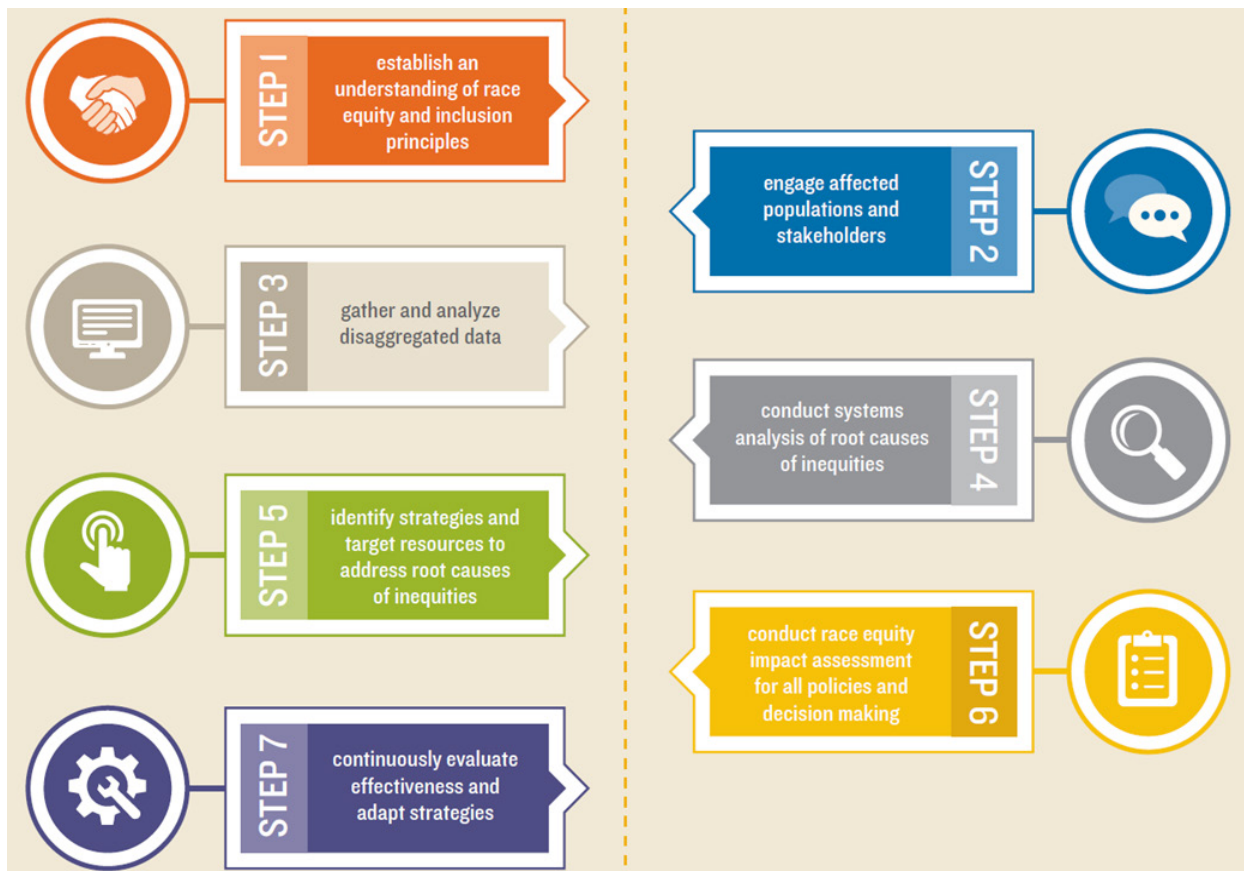


Equity Plan Template

The Annie E Casey Foundation offers their 2014 “Race Equity and Inclusion Action Guide,” which is summarized here in Figure 4.4, laying out their “7 Steps to advance and embed race equity and inclusion” within organizations.

The foundation offers that “advancing race equity and inclusion can sometimes seem daunting and often leaves many wondering how and where to start. The steps in this guide help to provide a clear frame for undertaking this important work.” (Annie E. Casey Foundation 2014)

Figure 4.5. Seven-step template summary to advance and embed race equity and inclusion



Source: [Annie E. Casey Foundation 2014, p. 3.](#)



Another guide for developing your equity plan is offered by The Center on Great Teachers & Leaders. In Figure 4.5, the Center offers six sections that form guidance and an outline to map out your plan.

Figure 4.5. Template and guide to develop, present, or communicate a district equity plan

SECTION I: INTRODUCTION

- Provide an overview of the plan, including the current district context and recent applicable state actions, all requirements addressed, and relevant legislation referenced.
- Provide the definition of "excellent educators" that your district will use to identify and address gaps in equitable access to excellent educators.
- Provide an overview of the plan development process, including what specific steps were taken by the district.

SECTION II: STAKEHOLDER ENGAGEMENT

- What stakeholder groups have you included in the design of the plan? How many individuals, from which stakeholder groups, met how often and for what purposes?
- What steps have you taken to ensure that stakeholder engagement was broad and authentic?
- What plans are in place to continue to engage stakeholders as part of an educator equity coalition to ensure that you implement the plan as envisioned?
- What mechanisms are in place for receiving and incorporating stakeholder input throughout the process through ongoing, two-way feedback loops?

SECTION III: EQUITY GAPS

- How does your district define key terminology for equitable access?
- What data sources were used to calculate equity gaps, and what do these data show?
- What inequities did your calculations identify?

SECTION IV: STRATEGIES FOR ELIMINATING EQUITY GAPS

- What theory of action and core principles are the basis for your plan?
- What root causes have you identified?
- What metrics did you choose to identify root causes, support chosen strategies, and assess performance in the future?
- What targeted strategies and sub-strategies for addressing equity gaps have you identified to address the root causes? What initiatives and policies related to each strategy are in place or will need to be updated at the district and school levels?
- How will you monitor the actions of local education agencies to ensure that low-income students and students of color are not taught at higher rates than other students by unqualified, out-of-field, inexperienced, or ineffective teachers?
- What resources (financial, human capital) will you use to support each strategy?
- What are the timelines and milestones for implementing the strategies and closing the equity gaps?

SECTION V: ONGOING MONITORING AND SUPPORT

- What are the mechanisms for ongoing technical assistance, monitoring, and feedback?
- Who will be responsible for ongoing monitoring (e.g., a district committee, including representatives from stakeholder groups)?
- How frequently will monitoring be conducted?
- How frequently, to which audiences, and through which mechanisms will you publicly report on progress?
- What are the short-term and long-term performance metrics will you use to assess progress toward achieving your goals?

SECTION VI: CONCLUSION

- Summarize the main points of each section

Source: [American Institutes for Research, Center on Great Teachers & Leaders 2014.](#)



Building an Equity Team

As an equity team begins to plan, there are a number of elements to consider. The team needs to know what it is empowered to do and what steps in the process are known. If there are deliverables, such as presentations to a board or other key stakeholders, that needs to be clear. If the team is to design the planning and implementation steps themselves, then that should be made clear. Both in the development of the equity teams and in their processes, what stakeholders need to be involved at each point must be considered. Key definitions and terms that are in and out of scope need to be defined. If certain terms are “hot potatoes”, and the words are likely to cause delay or turmoil in a state or district, then determining what alternative words and/or language exist is an important step. Describing how you can talk about the performance problems of the district and challenges for specific populations will be important in order to avoid political minefields later. Knowing who will be responsible for implementation, monitoring, and adjustment of the strategies going forward will improve efficacy and sustaining of momentum later.

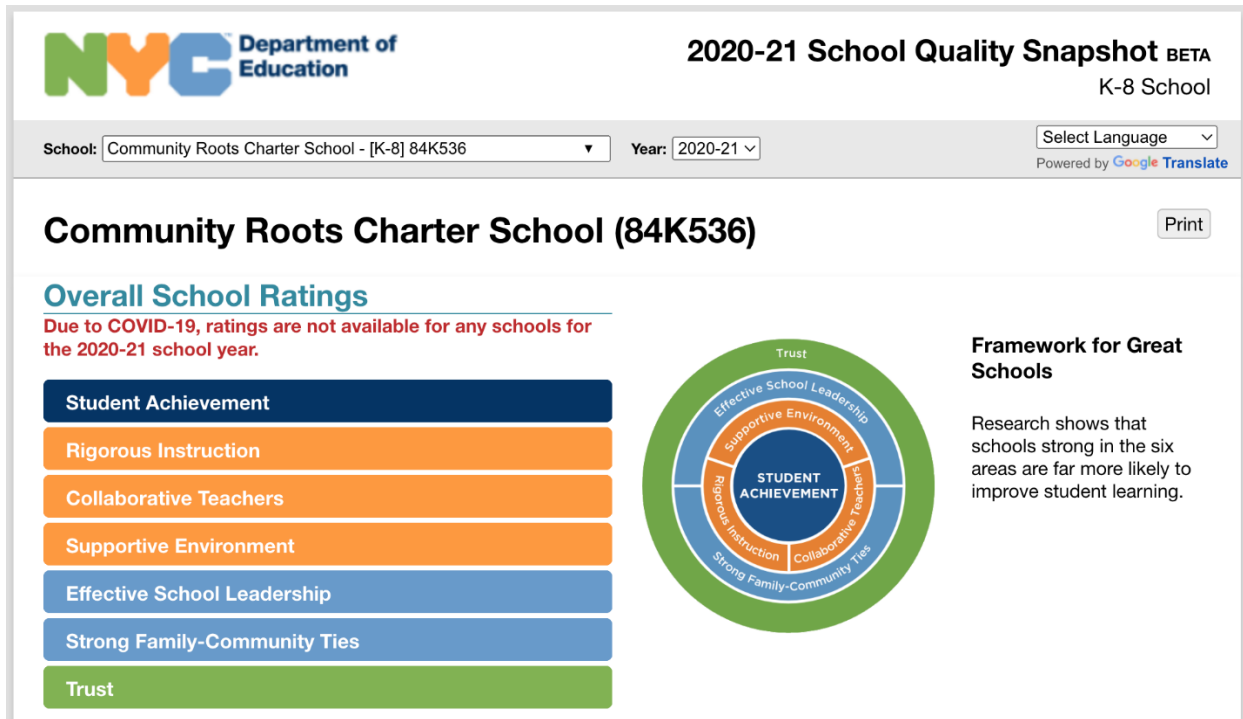
Ways to Learn About and Take Action to Address Racial/Ethnic Disparities

Identifying and addressing equity issues and their root causes has been standard practice for certain districts. Their experience has yielded a short list of practices that are critical to improving student learning.

Shown in Figure 4.6 is the New York City Department of Education (NYCDOE 2021) School Quality Snapshot, which is used to highlight areas of concern that successful schools have focused on (NYCDOE 2021). Shared at the Office of Elementary and Secondary Education is a summary of not only what is the purpose of a root cause analysis but also approaches to root cause analysis, the role of states and districts, and profiles of what it looks like in practice (New York State Education Department. (2018).). Applying an equity lens to the process shared will assist schools and districts to begin to address racial/ethnic disparities at the core.



Figure 4.6. Example of school quality snapshot, New York City

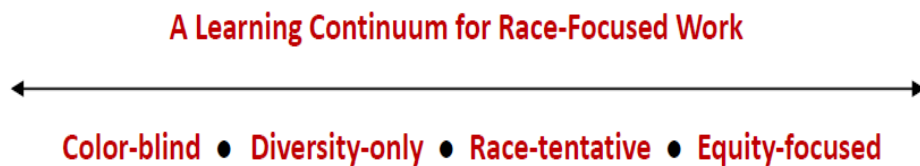


Source: [NYCDOE 2021](#).

Equity Learning Continuum for Organizations

The Developmental Model of Intercultural Sensitivity summarizes a learning continuum showing the different places an organization may move to or land with regard to race/ethnicity-focused work (Bennett 1993). Different departments of a given organization, and even different people within those departments, can be found in different places in terms of their learning.

Figure 4.7. Learning continuum for race-focused work



Source: [Annie E. Casey Foundation 2009, p. 5](#).

The definitions can be summarized as follows:

- » **Color-blind** occurs when an organization takes a broad-brush stroke and takes it to be necessarily true that what is good for all is good for People of Color. This misses the opportunity to identify and uplift equity, diversity, and inclusion; it may also be based on a misconception that granting attention to issues of disparity takes away from shared benefit and growth.
- » **Diversity-only** occurs when organizations give attention to diversity, but diversity alone. While the organization here may mistakenly feel the work of diversity either enables the full extent of the work towards equity or it is much work on its own and will consume scope capacity on issues of race, missing from this “space” is the opportunity to build true awareness and work towards, both, inclusivity and equity.
- » **Race-tentative** organizations know that racial equity work needs to happen, perhaps because of their own diversity-awareness within the organization or board but may be making assumptions on the causes of symptoms of inequity and are not certain of a collectively agreed ToC or ToA to enable systemic change and steps forward, or they may be tentative for not wanting to misstep.
- » **Equity-focused** organizations could be characterized as the most race-intentional organizations. These organizations understand that all functionality and programs need to be, and are, racially informed, to advance the organization and mission for all.

Progress along this continuum is non-linear, and may even circle back on itself from time to time or “skip” a point; however, the overall trajectory over time is forward.

Toolkits and Playbooks

Some states developed “playbooks” or “toolkits” to implement sustainable equity planning for their students. One example previously mentioned, as a state example of using a roadmap and Figure 2.12, is the TEA, which created the **Texas Equity Toolkit** - three-step equity process. (TEA 2022). It is a very pragmatic and straightforward guide to moving an equity agenda.

In Tennessee, the **Tennessee Leaders for Equity Playbook** (Tennessee Department of Education, 2018) lists Tennessee’s equity commitments, shown in Figure 4.8



Figure 4.8. Example of state commitments for systemic implementation of equity, Tennessee

EQUITY SHIFTS	Equity Commitment	Common Misconception	Equity Mindset	The research indicates...		
	Decrease Chronic Absenteeism	At-risk families value school less and therefore do not believe in the importance of regular attendance.	As leaders, we must believe, individually and collectively, that all of our families value the importance of their children's education and understand they can experience conditions that negatively impact regular attendance.	When low income elementary students attend school regularly, they can see outsized literacy gains. They gained 8 percent more growth in kindergarten and 7 percent growth in first grade than their higher income peers. ¹	Attending school more than 90 percent of the time in sixth grade significantly improves the chance for students to graduate high school on time. ²	1
	Reduce Disproportionate Out of School Suspension and Expulsion Rates	At-risk students have less structure and consistency outside of school and therefore need more exclusionary discipline measures to instill the value of respect for authority.	As leaders, we believe and acknowledge, individually and collectively, that the lived experiences of many families differ and understand those differences do not equate to student deficiencies.	Lower-suspending schools have lower grade retention and higher graduation rates than higher-suspending schools. ³	Restorative disciplinary practices are associated with large reductions in suspensions and steady and consistent achievement gains. ⁴	2
	Increase Early Postsecondary Opportunities	Early postsecondary coursework is only for select students who want to continue on to postsecondary. For other students, especially those who are disadvantaged, finishing high school is the best we can hope for.	As leaders, we believe, individually and collectively, that all students can acquire the knowledge, abilities, and habits to be successful in postsecondary education and careers of their choosing.	Students completing AP courses attend college at higher rates, earn higher grades in college, are less likely to drop out of college, and graduate at higher rates than non-AP students. ⁵	Low-income high school students completing an early postsecondary course ⁶ were 50 percent more likely to earn a college degree within six years than low income students who didn't complete an early postsecondary course. ⁷	3
	Equity Commitment	Common Misconception	Equity Mindset	The research indicates...		
	Provide Equitable Access to Effective Teachers	Teachers are all equally equipped and trained to be effective with all students, regardless of their evaluation outcomes.	As leaders, we acknowledge implicit bias in ourselves and our teachers and work to create an inclusive environment and provide supports to help educators improve and differentiate instruction for all students.	Students assigned to highly effective teachers accrue 18 to 24 additional weeks of additional learning compared to students assigned to ineffective teachers. ⁸	At-risk students assigned to highly effective teachers reduce the dropout rate by 3 percent. ⁹	4
	Recruit and Retain a Diverse Teaching Force	Teachers are all equally equipped and trained to be effective with all students, regardless of race.	As leaders, we work to acknowledge that students benefit from seeing teachers who look like themselves and address implicit bias when hiring, assigning, developing, and retaining teachers of color.	Students of color taught by teachers of color are likely to have positive gains in test scores, discipline, retention, and college persistence. ¹⁰	Significantly, these gains are realized even when students are not taught by teachers of color but attend a school where the diversity of the teachers more closely resembles that of the students. ¹¹	5
Embed Cultural Competence in All Aspects of School Practices	Racial and cultural identity do not impact the perceptions, beliefs, and actions of our students and educators.	As leaders, we acknowledge and celebrate the importance, value, and strength of our students' and educators' racial and cultural identities and work to eliminate personal and institutional biases and barriers.	A culturally responsive curriculum is an integral element in reversing poor academic outcomes for students of color. ¹²	Educators who acknowledge and understand cultural differences are better suited to promote parent and family engagement. This is important because increased parent engagement has a positive impact on school attendance, test scores, and rates of school discipline. ¹³	6	
Partner with Community Allies	Community partners exist to help with fundraising and carry out school funding needs.	As leaders, we believe community partnerships are stronger and more effective when, as allies, they serve a common vision, utilize the full range of assets of both partners, and provide mutually beneficial resources to improve the school community.	The development of school-community partnerships results in improved student learning, achievement, behavior, and attendance. ¹⁴	Schools benefit from school-community partnerships through increased parent participation in children's learning, including school volunteerism and increased resources (e.g., funding or material goods) to support student learning. ¹⁵	7	

Source: Tennessee Department of Education 2018, pgs. 4-5.



These recommended actions toward equitable outcomes for all students focus both on theory and pragmatism. They outline practical responses to inequities, data, and strategies for each problem area.

“These seven equity commitments require shifts in mindset and practice to provide and sustain equitable outcomes for all students. **Creating equitable outcomes for all students requires acknowledging current, deep-seated mindsets about race and culture, before individual or collective shifts to an equity mindset can occur. These equity shifts rest upon the powerful notion that **student outcomes will not change until adult learning and behaviors change.**”**

— Tennessee Department of Education. (2018, p.4)

West Virginia also has a Toolkit for Systemic Implementation of Equity (Hanover Research 2019), which includes very detailed guidance and theory about how to move an equity agenda forward.

Helpful Tools

In addition to organizational resources, you need tools to manage individual growth and to assist with the journey to undo current inequities in public education. They are necessary to prepare you for self-development, self-sustenance, and the work of improving schools, including preparation of personal knowledge, cultural competence, skills, and strategies for approaching systemic challenges and inequity.

Decision Making Tools

The Racial Equity Impact Assessment Guide (Race Forward 2009) highlighted here below, is an example of a process designed to guide equitable reflection through an equity lens, used by foundations in decision making. Once the mindset is in place to engage fully in the work of equity, then the tools, frameworks, and guides to the equity journey that we will present in this report will make sense and be able to be operationalized with fidelity.

Racial Equity Impact Assessment (REIA) Guide

1. Identifying Stakeholders:

Which racial/ethnic groups may be most affected by and concerned with the issues related to this proposal?



2. Engaging Stakeholders:

Have stakeholders from different racial/ethnic groups especially those most adversely affected been informed, meaningfully involved, and authentically represented in the development of this proposal? Who is missing and how can they be engaged?

3. Identifying and Documenting Racial Inequities:

Which racial/ethnic groups are currently most advantaged and most disadvantaged by the issues this proposal seeks to address? How are they affected differently? What quantitative and qualitative evidence of inequality exists? What evidence is missing or needed?

4. Examining the Causes:

What factors may be producing and perpetuating racial inequities associated with this issue? How did the inequities arise? Are they expanding or narrowing? Does the proposal address root causes? If not, how could it?

5. Clarifying the Purpose:

What does the proposal seek to accomplish? Will it reduce disparities or discrimination Racial

6. Considering Adverse Impacts:

What adverse impacts or unintended consequences could result from this policy? Which racial/ethnic groups could be negatively affected? How could adverse impacts be prevented or minimized?

7. Advancing Equitable Impacts:

What positive impacts on equality and inclusion, if any, could result from this proposal? Which racial/ethnic groups could benefit? Are there further ways to maximize equitable opportunities and impacts?

8. Examining Alternatives or Improvements:

Are there better ways to reduce racial disparities and advance racial equity? What provisions could be changed or added to ensure positive impacts on racial equity and inclusion?

9. Ensuring Viability and Sustainability:

Is the proposal realistic, adequately funded, with mechanisms to ensure successful implementation and enforcement? Are there provisions to ensure ongoing data collection, public reporting, stakeholder participation, and public accountability?

10. Identifying the Success Indicators:

What are the success indicators and progress benchmarks? How will impacts be documented and evaluated? How will the level, diversity, and quality of ongoing stakeholder engagement be assessed?




An example of a **curriculum tool** that can help organize your thinking around curriculum reform is the Curriculum Framing tool, shared in Figure 4.9. This tool offers a useful checklist for curriculum reframing.

Figure 4.9. Virginia Department of Education curriculum reframing tool for inclusivity

CURRICULUM REFRAMING

Mitigates bias and ensures that diverse groups from all rings of culture are represented, validated, and affirmed. Ensures historical accuracy and reflection of diverse perspectives.



- Do we include in our textbook review process, evaluation of the content to ensure that it reflects the experiences and perspectives of diverse racial, ethnic, language, religious, and gender groups?
- Do we provide training to instructional leads on culturally relevant curriculum auditing practices?
- In the last 12 months, has our division used an audit or tool to evaluate our curriculum for cultural inclusivity and accuracy?
 - If yes - Select the subjects and grade levels in which curriculum was audited for cultural inclusivity and accuracy (select all that apply):
 - Preschool/Early Childhood
 - History & Social Science (all grade spans)
 - History & Social Science (specific grade spans), Please list on next page.
 - English & Language Arts (all grade spans)
 - English & Language Arts (specific grade spans), Please list on next page.
 - Fine Arts (all grade spans)
 - Fine Arts (specific grade spans), Please list on next page.
 - STEM Subjects (all grade spans)
 - STEM Subjects (specific grade spans), Please list on next page.
 - Other, please specify on next page.
- In the last 12 months, has our division used an audit or tool to evaluate our curriculum for gender bias?
 - If Yes - Select the subjects and grade levels in which curriculum was audited for gender bias (select all that apply):
 - Preschool / Early Childhood
 - History & Social Science (all grade spans)
 - History & Social Science (specific grade spans), Please list on next page.
 - English & Language Arts (all grade spans)
 - English & Language Arts (specific grade spans), Please list on next page.
 - Fine Arts (all grade spans)
 - Fine Arts (specific grade spans), Please list on next page.
 - STEM Subjects (all grade spans)
 - STEM Subject (specific grade spans), Please list on next page.
 - Other, please specify on next page
- In the last 12 months, has our division used an audit or tool to evaluate our curriculum for racial and ethnic bias?
 - If Yes - Select the subjects and grade levels in which curriculum was audited for racial and ethnic bias. (select all that apply):
 - Preschool/Early Childhood
 - History & Social Science (all grade spans)
 - History & Social Science (specific grade spans), Please list on next page.
 - English & Language Arts (all grade spans)
 - English & Language Arts (specific grade spans), Please list on next page.
 - Fine Arts (all grade spans)
 - Fine Arts (specific grade spans), Please list on next page.
 - STEM Subjects (all grade spans)
 - STEM Subjects (specific grade spans), Please list on next page.
 - Other, please specify on next page.
 - In the last 12 months, have we evaluated our curriculum to ensure that people with disabilities are shown in the curriculum actively interacting alongside people with and without disabilities?
 - If Yes - Select the subjects and grade levels in which curriculum was audited to ensure that people with disabilities are shown in the curriculum (select all that apply):
 - Preschool/Early Childhood
 - History & Social Science (all grade spans)
 - History & Social Science (specific grade spans), Please list on next page.
 - English & Language Arts (all grade spans)
 - English & Language Arts (specific grade spans), Please list on next page.
 - Fine Arts (all grade spans)
 - Fine Arts (specific grade spans), Please list on next page.
 - STEM Subjects (all grade spans)
 - STEM Subjects (specific grade spans), Please list on next page.
 - Other, please specify on next page.
 - In the last 12 months, has our division used an audit or tool to evaluate our history curriculum for: (select all that apply)?
 - Historical Accuracy
 - All grade spans.
 - Specific grade spans. Please list on next page.
 - Diverse cultures have representation, validation, and affirmation of diverse cultures:
 - All grade spans.
 - Specific grade spans. Please list on next page.

Source: [Virginia Department of Education 2020, p. 35.](#)

An example of a **data tool** for **managing your change** efforts is the Results-Based Accountability™ “Turn-The-Curve” template. It can be found in the Results-Based Accountability™ Guide (Results Leadership Group 2010, p. 4), created by the Results Leadership Group® LLC. As you’ll see in Figure 4.10, identifying specific outcomes upfront is an important part of devising an effective plan.

Figure 4.10. The results-based accountability™ “Turn-The-Curve” change management template

II. THE RBA “TURN-THE-CURVE” TEMPLATE

This template is an overview of the step-by-step RBA “turn-the-curve” decision-making process.



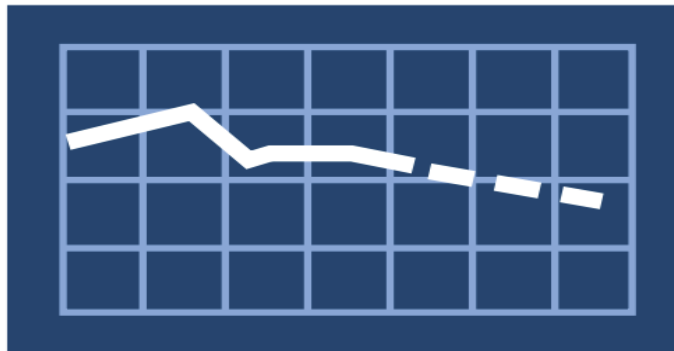
1 What is the “end”?

Choose either a result and indicator or a performance measure.



2 How are we doing?

Graph the historic baseline and forecast for the indicator or performance measure.



3 What is the story behind the curve of the baseline?

Briefly explain the story behind the baseline: the factors (positive and negative, internal and external) that are most strongly influencing the curve of the baseline.



4 Who are partners who have a role to play in turning the curve?

Identify partners who might have a role to play in turning the curve of the baseline.



5 What works to turn the curve?

Determine what would work to turn the curve of the baseline. Include no-cost/low-cost strategies.



6 What do we propose to do to turn the curve?

Determine what you and your partners propose to do to turn the curve of the baseline.

Source: [Results Leadership Group 2010, p. 2.](#)



Chapter Five: Recommended Best Practices

There are many practices that could fit well in this area. A few are mentioned here to help you focus and get started on your journey. We begin with a reminder of the notion of targeted universalism so that the notion of meeting the needs of all students is elevated. No students should be left out, they all have unique needs and the system should adapt to them all.

Targeted Universalism

Targeted Universalism is goal or outcome-oriented; and it intentionally sets out multiple strategies to work towards the outcome or goal, because it starts by acknowledging differences among different groups of people on the whole (powell et al. 2019). The idea of a common or shared goal is key to fostering aspiration for the whole and taking collective responsibility and accountability towards attaining the goal. Aspiration for the whole is also key. It means all groups feel the aspiration to rise higher, as opposed to just closing the gap among the groups, which would leave some groups lacking any benefit from the work undertaken, and likely lacking the motivation to support or participate.

Five Lessons on the Road to Leading for Results

1. Being clear about the result you are trying to achieve and how you would measure progress is essential to drive change. Naming a result states what success looks like; it gives you an aspirational target. Deciding how you will measure progress should inform your strategy.
2. Using data is an important catalyst for change. Seeing the data can create a sense of urgency, and tracking changes over time is motivating. When the trends are good, it inspires us to keep going. When the trends are in the wrong direction, we know it is time to change the strategy. Data also becomes a tool for accountability, helping a group stay focused on what it still needs to accomplish.
3. No one person or organization can achieve lasting change. Partners acting in high alignment toward the same result are more likely to make a measurable, sustainable difference than any one organization.
4. Leading change in complex environments is not simply a matter of building technical skills. It requires leaders who can engage partners and shift behaviors, attitudes, and beliefs. It also requires the ability to successfully navigate very complex environments.
5. Leaders matter. People can take up their authority and leadership from whatever position they hold and make a contribution toward achieving the result. (Annie E. Casey Foundation 2020).

Key Topics

Assessment

Implementing an equity assessment as a part of a larger racial equity initiative can accelerate progress toward remedying equity issues. The data you gather on program effectiveness, key equity



challenges, and human capital needs can sharpen your understanding of the state of equity in the state or district, clarify your desired outcomes, and help you build consensus on the path forward. Ideally, you want a wide variety of stakeholders to engage in reviewing your data and defining success. Assessments related to equity, like the one shown in Figure 5.1, can focus on any number of variables and levels, including district, teacher, student, team, culture, stakeholder, and leadership assessment. Each of these areas may be a useful source of data for planning and managing equity initiatives.

Figure 5.1. District-level racial equity analysis tool



Racial Equity Analysis Tool

Description: Districts can use this tool to determine whether their proposed and current policies, programs, and practices support educational equity.



1. SET OUTCOMES AND IDENTIFY STAKEHOLDERS

- What does your department/division/school define as racially equitable outcomes related to this issue?
- How will leadership communicate key outcomes to stakeholders for racial equity to guide analysis?
- How will leadership identify and engage stakeholders: racial/ethnic groups potentially impacted by this decision, especially communities of color, including students who are English language learners and students who have special needs?



2. ENGAGE STAKEHOLDERS IN ANALYZING DATA

- How will you collect specific information about the school, program, and community conditions to help you determine if this decision will create racial inequities that would increase the opportunity gap?
- Are there negative impacts for specific student demographic groups, including English language learners and students with special needs?



3. ENSURE EDUCATIONAL AND RACIAL EQUITY/DETERMINE BENEFIT OR BURDEN

- What are the potential benefits or unintended consequences?
- What would it look like if this policy/decision/initiative/proposal ensured educational and racial equity for every student?



4. EVALUATE SUCCESS INDICATORS AND/OR MITIGATION PLANS

- How will you evaluate and be accountable for making sure that the proposed solution ensures educational equity for all students, families, and staff?
- What are the specific steps you will take to address impacts (including unintended consequences), and how will you continue to partner with stakeholders to ensure educational equity for every student?

Source: [Hanover Research, p.18.](#)



Organizational Assessments for Districts

Assessment of organizational capacity for managing equity can take many forms, at many levels. District-level assessments by the state departments of education have become a standard practice in many states. Reports on conditions for success in district practice have become common. They play a valuable role in shaping district reform efforts. Superintendents will often use such reports to set the groundwork for improvement efforts. In the absence of such reports, districts have to pursue audits and other sources of externally validated data that offer an arguably objective view of the district. Either way, you need data to set a point of departure to provide a line in the sand indicating where the work begins and agreed upon target areas for improvement. It is not essential nor is it feasible for states to offer each district such in-depth reportage. But, it is within their purview and scope to ensure that each district has the benefit of such a resource. Assessment for progress in developing equity programs and outcomes can be a more specialized activity that targets disproportionality in data showing the needs of underserved populations. ESSA has raised the stakes by requiring districts to have an equity plan. Districts are responding to this demand by identifying ways to track this data and, in some cases, build the capacity to engage in this work. Capacity is key because it is not a given that all administrators will know how to see what they have not historically seen before. We call them blind spots for a reason.

Equity Progress Assessment (EPA) District Rubric

States can support the building of district capacity to digest equity-related information. They can ensure that districts have externally validated reflections on their practice and outcomes. This report will highlight examples of processes that states can use to support districts in fostering dialogue and reflection on their current practice as it relates to equity outcomes. One resource was developed by Dr. Stacy Scott in collaboration with Lisa Holman as a part of Harvard's Re-imagining Integration for Diverse and Equitable Schools (RIDES) project (Scott, S. L., and Holman, R. (2019, January). The EPA includes a rubric that outlines high and low levels of performance.

The assessment uses the proficiency level for comparison. Districts around the country have found that this tool helps leadership teams engage in rich dialogue assessing current practice in a few key areas, building language and norms around investigating inequities and underperformance in their system, their teachers, and their students. When teams become comfortable engaging in such dialogue, they create unlimited capacity to address equity-related district problems.

We start with this tool because we want to emphasize the importance of starting the conversation and recognizing that this is the journey, and that the journey is more important than the destination. With expanded capacity, leadership can deal with any number of issues that plague the district and cause underperformance. Consider this a tool to use as a starting point in strategic discussions for building consensus and identifying current challenges.



Figure 5.6. District/state-level rubric for EPA

	Performance level (see descriptors for each level)				Evidence	Plan to improve		
	4	3	2	1		Do - now	This year	Next year
ACADEMICS								
Curriculum is rigorous, challenging and culturally relevant. It represents high expectations for all students, requiring critical thinking and problem solving. It is well supported to ensure all students have opportunity to achieve success at a high academic level. Content is asset-based and has pro social representation from various racial, gender, and other marginalized subgroups.								
Use an equity lens and effectively build on the interests, strengths and home cultures of the school's students and families. Culturally relevant pedagogy is infused into the content of literature, class projects, assignments, assessments events, field trips, ethnic studies courses, connections to families and communities, interventions and other resources.								
Rigorous academic preparation is accompanied by high levels of knowledge and skills, capitalizing on and connecting to students of all backgrounds. All students have access to rigorous courses and supports to ensure success.								
BELONGING	Performance levels				Evidence	Plan to improve		
	4	3	2	1		Do - now	This year	Next year
A safe, welcoming school environment that embraces the diversity of race, ethnicity and religion, gender and sexual orientations among students and staff members distinguishes the school.								
Clear and effective policies, systems and procedures are in place and equitably enacted, such as democratic decision-making and non-exclusionary approaches to discipline. The school has an active and successful plan to help students learn positive social behavior. There is evidence that the school has reduced instances of bullying, harassment or discrimination.								
Students feel they have a voice and ownership of their learning. They take an active role in creating an anti-bias culture and dismantling racism. They learn resilience and empathy while feeling a strong sense of belonging. Diverse representation of students, parents and community members are key participants in school decision-making and culture.								



Figure 5.7. District/state-level rubric for EPA—continued

COMMITMENT TO DISMANTLING RACIST STRUCTURES	Performance levels				Evidence	Plan to improve		
	4	3	2	1		Do-now	This year	Next year
Broadening and deep learning opportunities involves a varied and high quality curriculum with substantial enrichment experiences. There is particular attention on reducing disparities in learning (racial, gender, etc.) created by tracking and ability grouping. There is intentional planning regarding managing structural changes at the systemic level.								
Academic placement is not predictable by race and gender; ability grouping is limited and used strategically to avoid tracking defined as intentional segregation based upon current performance, race or other criteria. High levels of inclusion in the most rigorous courses exists for low SES students, students with disability and students of color. Access and support exists for those wishing to be in the most rigorous courses and opportunities.								
Data is used to analyze, plan and change structures and systems that support racial inequities and learning outcomes. Data is used to analyze and respond to trends in targeted areas such as staffing, community involvement, staff development, student assignment, course enrollment, discipline as well as college & career planning and enrollment.								
Community involvement and partnerships are an active representation of equity and valuing of diversity in the community. The school participates in community projects and draws on diverse community assets. Parents and community groups are engaged in courageous conversations about race, class, expectations, and the role of education in the community.								

Source: [Scott and Holman 2019](#).

Some assessments are categorical questions that support investigation in critical areas of performance. They may be backed up by a rubric that further outlines the levels of performance available in each area. The Equity Progress Indicator, shown in Figure 5.3, was published in the Principal’s Handbook: Making Equity Work: Releasing Unlimited Possibilities for Closing the Achievement Gap in Your School (Scott, S. L., 2006).



Figure 5.3. Equity progress indicator for critical areas of equity performance

EQUITY QUALITY INDICATORS Scoring Guide

Scoring Rubric			
Beginning	Developing	Proficient	Advanced
1	2	3	4

Scoring Rubric				
Beginning	Developing	Proficient	Advanced	
Curriculum				
1. Do all students have access to challenging and rigorous standards-based curriculum?	1	2	3	4
2. Does early identification of students who are behind facilitate diagnostic information gathering, targeting instruction and intervention strategies?	1	2	3	4
3. Are students taught with on-grade level material?	1	2	3	4
4. How does the school ensure that every student has access to standards-based curriculum?	1	2	3	4
5. Are high expectations clearly communicated to all students?	1	2	3	4
6. For students who are below grade level, are there significant strategies in place to fill their knowledge gaps and to accelerate their performance up to the standard?	1	2	3	4
7. Are strategies for identifying and intervening for struggling students are fully articulated and effective?	1	2	3	4
Instruction				
8. How well are teachers trained, certified and prepared to teach their subject matters?	1	2	3	4
9. How often do teachers collaborate to adjust instruction for students in need?	1	2	3	4
10. How well does instruction develop academic skills and learning strategies for all students?	1	2	3	4
11. How well do teachers understand strategies for acceleration of student learning?	1	2	3	4
12. How well do teachers write across the curriculum?	1	2	3	4
13. How well is the climate for learning and motivation supported and effectively managed?	1	2	3	4
Assessment				
14. Are there multiple opportunities for success created by increasing the number of formative assessments?	1	2	3	4
Family and Community Involvement				
15. To what degree does the community foster a sense of belonging?	1	2	3	4
16. To what degree is the school community supportive?	1	2	3	4
17. To what extent is the school community inclusive?	1	2	3	4
Leadership				
18. Are teachers aware of the vision and mission of the school?	1	2	3	4
19. To what extent are decisions about academic achievement made on the basis of school data?	1	2	3	4

Source: Excerpt from *Making Equity Work: Releasing Unlimited Possibilities for Closing the Achievement Gap in Your School* (Scott, S. L., 2006)



Some assessments focus on various stakeholders such as administrators at different levels. The Colorado Department of Education created the Colorado Multi-stakeholder Assessment to focus on different levels of the organizations.

Figure 5.4. Stakeholder self-assessment: School administration

–Colorado Multi-Stakeholder Assessment

Self-Assessment for School Administrators*

	Most of the time	Some of the time	Never
I am aware of my own racial, ethnic, and cultural background, and understand how it affects my perceptions and values.			
I seek opportunities to learn about the cultural practices in our school community, including staff, families, and students.			
I regularly reflect on my own bias and how I view and treat people with cultural practices that are different than my own.			
Our school regularly examines academic and behavioral data for achievement gaps by race, native language, socio-economic status, and gender.			
Strategic plans are put in place to address all achievement gaps.			

Source: [Colorado Department of Education 2010, p. 25](#)

Figure 5.5. Stakeholder self-assessment: District administration

Self-Assessment for District Administrators*

	Most of the time	Some of the time	Never
I am aware of my own racial, ethnic, and cultural background and understand how it affects my perceptions and values.			
I seek opportunities to learn about the cultural practices in my school community, including staff, families, and students.			
I regularly reflect on my own bias and how I view and treat people with cultural practices that are different than my own.			
Our district collects and disseminates academic and behavioral data, and examines achievement gaps by race, native language, socio-economic status, and gender.			

Source: [Colorado Department of Education 2010, p. 23](#)

Affinity Groups

Creating and supporting affinity groups or collaboratives within an organization can help you advance towards an equity-focused organization.

Having a cross-unit, cross-functional, multi-racial work group can provide the following support:

- » Helps educate staff on issues around race/ethnicity
- » Introduces experts and information about race/ethnicity to the organization
- » Encourages management and staff to include an understanding of race/ethnicity as part of mission-relevant knowledge and competencies
- » Provides a forum for discussion about issues and experiences around race/ethnicity
- » Offers networking and peer exchange around race/ethnicity
- » Represents an organizational space where staff of color and other members feel comfortable and respected

These tips on getting started with affinity groups, including core competencies for such groups, can be found through the Annie E. Casey Foundation (2009).

Other Key Topics (Tennessee ESSA Leadership Learning Community 2018)

1. Decrease Chronic Absenteeism

Regular attendance holds a strong correlation to academic and future success. Parent and student engagement, early outreach and intervention, and programmatic responses to absenteeism are proposed strategies to remedy the issue. Key interventions may address the various myths, barriers, and reasons for academic aversion and disengagement (Bergin and Ferrara 2019).

2. Reduce Disproportionate Suspension and Expulsion Rates

Maryland Families Engage provides a resource hub for faculty/staff and parents that consists of data, webinars, and articles to address suspension and expulsion (Maryland Families Engage n.d.).

3. Increase Early Postsecondary Opportunities

Rhode Island's Blackstone Valley Prep Charter Schools is a forerunner in being intentional about building diverse learning environments that focus on future preparedness. The three schools eliminated academic tracking, allowing students with diverse skills to learn with and from each other (Zimmer 2018).

4. Provide Equitable Access to Effective Teachers

Kentucky makes an explicit commitment to supporting equitable access to effective teachers. They offer a variety of teacher preparation programs to ensure that all students are served by experienced and diverse teachers. They provide resources that address racism, focus on the impact of bias, and focus on embracing diversity. (Kentucky Department of Education 2022)



5. Recruit and Retain a Diverse Teaching Force

A diverse teaching staff has significant benefits for students of color, including retaining the students in school through graduation and boosting their future academic aspirations. A Phi Delta Kappa report in January 2019 shared that “[for] a low-income Black male student in grades 3 through 5, being taught by at least one Black teacher reduces the probability of dropping out by 39% and increases the student’s intent to pursue a 4-year university degree by 29%” (Goldhaber et al. 2019).

“The largest estimates from the literature on role-model effects (Rockoff 2004) are surprisingly comparable to the effects associated with having more than 5 years of teaching experience and a higher level of teacher quality.”

–Goldhaber et al. 2019.

Strategies for Eliminating Equity Gaps

The New Teacher Project in MA is an example of the workforce development efforts going on in Massachusetts, and many states. To this effect, Massachusetts has created a guidebook on recruitment, selection and retention strategies to build a diverse teacher workforce. (Massachusetts Department of Elementary and Secondary Education 2021)

West Virginia’s Educator Equity Plan outlines the state’s very extensive plan to meet the objectives of increasing access to quality educators for the state’s most disadvantaged students, including stakeholder engagement, exploration of equity gaps, root cause analysis, strategies for eliminating equity gaps, and monitoring and support (West Virginia Department of Education 2015).

Considerations for Diverse Teacher Enablement

Financial Support

Virginia created a task force to “Diversify Virginia’s Educator Pipeline.” Among the recommendations was to provide state funding assistance, which would enable provisionally licensed minority teachers to get full state certification. Within 2 years, the first grants were awarded among seven districts (Council of Chief State School Officers [CCSSO] 2019).

Part of Kentucky’s Department of Education’s plan in 2019, for its equity priority, was to offer financial support for successful candidates to complete board-approved teacher education, as well as receive mentorship. In return, the candidate teaches for one term in a public or certified nonpublic school in the state. If they opt not to, then their funding is converted into a loan (CCSSO 2019).



Multi-Pronged Support

A way to open possibilities and attract interested talent early on is to build a diverse educator candidate pipeline. This is an intentional pathway for passionate, diverse educators in the making to follow and expand their passion. The pipeline could begin as early as middle school and would enable students to be and feel more prepared, all the way through higher education and career placement.

SEAs can assist “grow-your-own” initiatives by enabling and encouraging local education agencies to build educator-focused academy programs based on preparing all students aiming to become educators and prioritizing diversity among candidates.

Kentucky’s Department of Education strategic plan explicitly outlined equity as one of its four priorities. They identified “recruitment, development, and retention of an effective, diverse, and culturally-competent educator workforce” as part of an urgent state education goal. Kentucky created its Kentucky Academy for Equity in Teaching (KAET), based on a multi-part approach to build and retain a more diverse pool and pipeline of teacher candidates (Kentucky Department of Education 2022a).

Here we expand upon four steps that many state initiatives draw from: inspire, prepare, support, and improve. Examples and considerations are listed below.

1. Inspire:

Suss out and further inspire the authentically intentioned future educators, with multiple touch points of support.

By designing competitive grant programs for its districts to apply to, Kentucky enabled districts to form creative solutions to build their diverse educator pipeline.

In 2017/18 Kentucky launched Teacher and Learning Career Pathway courses in schools to build diversity early on in the educator pathway (Kentucky Department of Education 2022c). Kentucky middle/high schools and colleges formed Education Rising chapters, where diverse students could gain further resources, and build connections to fuel and expand their interest in the educator pathway (Educators Rising 2022).

‘Pathways2Teaching’ in Colorado, created by Dr. Margarita Bianco, an Associate Professor at the University of Colorado Denver, School of Education and Human Development, is one example of a Grow-Your-Own program. Students study and understand inequity in schools with the aim that they feel more inspired to teach and help disrupt the patterns of inequity. Students get to “explore teaching as a career choice, examine critical issues related to educational justice, and earn college credit” (Beuten 2017).

Pathways for key administrators to guide the equity journey are no less important.

Implementation of higher leadership positions in the state education system has increasingly



focused on, and put in action, education equity programs. These positions show a pathway of “higher” success filled with people that reflect the diversity sought after in the educator talent pool: for example, Kentucky DoE's Chief Equity Officer (2020); Delaware DoE's Chief Equity Officer (2021); Colorado Poudre School District's Chief Equity and Academic Officer (2022); Colorado Department of Higher Education's Chief Educational Equity Officer (2021).

2. Prepare:

Financial support options plus mentorship opportunities enable a greater number of diverse future educators to seriously consider pursuing this aspiration and hold to the path, as demonstrated in Table 5.1.

For higher education, build awareness of scholarships, grants, subsidies and loan forgiveness programs for aspiring or in-training diverse educators of color. Examples include Kentucky, Colorado, Florida, Missouri, Minnesota, New Jersey, and Federal Teacher Loan Forgiveness.

Table 5.1. Scholarships, grants, subsidies and loan forgiveness programs for aspiring or in-training diverse educators of color

State	Program site	URL
Kentucky	Teacher and Learning Career Pathway courses	https://education.ky.gov/teachers/Pages/Teaching-and-Learning-Career-Pathway.aspx
Kentucky	Educators Rising	https://educatorsrising.org/
Florida	Florida Fund for Minority Teachers	https://www.ffmt.org/
Missouri	Minority Teaching Scholarship	https://dhewd.mo.gov/ppc/grants/minorityteaching.php#:~:text=Maximum%20award%20amounts%20are%20%243%2C000,that%20does%20not%20require%20repayment
Minnesota	Collaborative Urban and Greater Minnesota Educators of Color (CUGMEC) Grant Program - Summary of Color	https://www.auditor.leg.state.mn.us/ped/2021/cugmecs/um.htm#:~:text=The%20Collaborative%20Urban%20and%20Greater,meet%20certain%20teacher%20licensing%20requirements
New Jersey	Loan Forgiveness	https://www.nj.gov/education/rpi/loans/
Federal	Federal Teacher Loan Forgiveness	https://studentaid.gov/manage-loans/forgiveness-cancellation/teacher
Colorado	Pathways2Teaching	https://education.ucdenver.edu/partnerships/our-impact/pathways-2-teaching-
Clemson University	Call Me MISTER	https://www.clemson.edu/education/programs/program/s/call-me-mister.html



Coordinate mentorship and/or coaching between students of color at higher institutions and flourishing teachers in districts/ schools. This is with the aim of increasing the likelihood of students' continuation along the pathway and building a sense of belonging within the profession.

In return for grants or scholarships, consider a "required return" for the candidates.

In Kentucky, educator candidates who are offered a grant and mentorship are given placement immediately by being required to teach a term in a state public or certified nonpublic school. If they opt not to, their funding is converted into a loan (Carver 2018).

Consider and bring awareness to other high-quality alternate pathways to certification, to attract and retain a diverse teacher workforce such as Clemson University Foundation's Grant program 'Call Me MISTER' (Mentors Instructing Students Toward Effective Role Models) which aims to "Build a pipeline of African American male teachers in Mississippi's K-8 classrooms by implementing a culturally relevant and responsive teacher preparation program (Kellogg Foundation n.d.)." It offers loan forgiveness, mentorship, academic and peer support, preparation for state licensure exams, and assistance with job placement for all grantees (Clemson University 2022).

3. Support:

Build multiple support levels for educators once they're in the workforce, including systems and practices.

A strong example of multi-tiered support is Kentucky's Multi-Tiered System of Supports, which includes:

- » Equity modules, such as the A4 modules (KYMTSS), to help educators think through and design more equitable strategies that up-level all students
- » High-quality instructional materials in an Equity Toolkit (e.g. Kentucky's Equity Toolkit)
- » Setting standards to develop and embed equity through curriculum and resources that are culturally relevant and bias-free
- » Building and regularly reviewing a dashboard of data-based performance to help teachers understand performance trends for underserved groups, and identify thematic needs to up-level all students. A link to Kentucky's example is shared in the table below
- » Providing 1:1 coaching opportunities for individual growth in educators' equity awareness, self-awareness, and implicit biases, including but not limited to Harvard University's Implicit Association Test, part of Project Implicit



Table 5.2 includes the list of sources:

Table 5.2. Example of a state-level, multi-tiered system of support, Kentucky

Support Element	URL	Description
Equitable Access and Opportunity (2022b)	https://kymtss.org/essential-elements/equitable-access-opportunity/	Overview of the framework of the multi-tiered system of supports
A4 Modules (2022a)	https://education.ky.gov/teachers/Pages/A4-Modules.aspx	Helps educators think through and design more equitable strategies
Kentucky’s Equity Toolkit (2022d)	https://kymtss.org/resources/resources-for-equitable-access-opportunity/kentuckys-equity-toolkit/	High-quality instructional materials
Kentucky Standards (2022)	https://kystandards.org/standards-resources/inst-mats-align-rubrics/	Develop and embed equity through curriculum and resources
Kentucky’s Example of a Data-based Dashboard (2022c)	https://kymtss.org/resources/resources-for-equitable-access-opportunity/kentuckys-equity-toolkit/equity-dashboard/	Create a dashboard of data-based performance
Harvard University’s Implicit Association Test, part of Project Implicit	https://implicit.harvard.edu/implicit/	Support individual growth in educators’ equity awareness, self-awareness, and implicit biases

Create opportunities for peer-to-peer educator conversations focused on equity, which builds a greater understanding of, and higher standards for, equitable student experience. Enable these conversations around strategies, tools, and successes/challenges to expand and lift equity success in practice.

Honestly assess your system of educator evaluation and reward, specifically for educators of color. Of note is the report by TERA, with Vanderbilt University, which concluded in 2021, that:



“Black teachers and male teachers receive systematically lower observation scores than their White and female peers even when they have similar qualifications and their students achieve similar test scores and other outcomes,” and “...the race gap is influenced by several factors. These include the racial isolation of Black teachers, the differing characteristics of students who are assigned to Black and White teachers, and the race of the teacher’s observer.”

– Grissom, Bartanen, and Toone 2021

4. Improve:

To grow forward in building quality, diverse educator talent, keep improving by closing the feedback loop and building-in regular evaluation of processes and results.

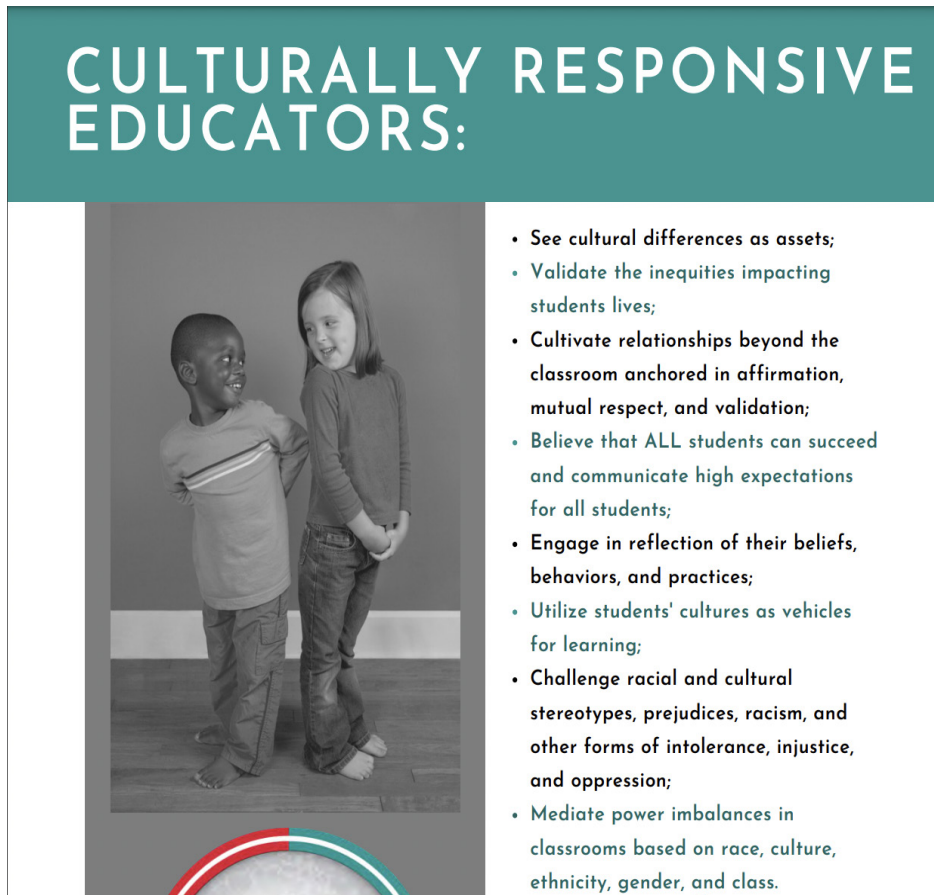
Build an effective task force focused on recruitment and retention of diverse teachers and listen to what’s happening in the field by creating focus groups of educators and engaging them regularly to understand and address what in the equity journey is working well and what is not. Give this feedback to the task force to refine and update strategies, plans, and tools for continuous better outcomes.

6. Embed Cultural Competence in School Practices

It is becoming increasingly important to develop culturally responsive educators with skills for awareness, reflection, and reform of issues that threaten to create power imbalances and stereotypes. This is important for skill in developing relevant instruction and developing relationships within and outside of the classroom. Responding to bias and discrimination requires tact and training to manage the nuanced needs of the classroom. Students need to prepare to live in a diverse world. The chart in Figure 5.6 highlights critical skills educators need to have to be culturally responsive.



Figure 5.6. Key descriptors of culturally responsive educators



CULTURALLY RESPONSIVE EDUCATORS:

- See cultural differences as assets;
- Validate the inequities impacting students lives;
- Cultivate relationships beyond the classroom anchored in affirmation, mutual respect, and validation;
- Believe that ALL students can succeed and communicate high expectations for all students;
- Engage in reflection of their beliefs, behaviors, and practices;
- Utilize students' cultures as vehicles for learning;
- Challenge racial and cultural stereotypes, prejudices, racism, and other forms of intolerance, injustice, and oppression;
- Mediate power imbalances in classrooms based on race, culture, ethnicity, gender, and class.

Source: [Virginia Department of Education 2020, p. 23.](#)

7. Partner with Community Allies

Our Collective Work


The work of enhancing equity is supported by development at all levels. In all roles, adults must increase their self-awareness and use the intersection between their own stories and that of their students, colleagues, and staff to promote the growth of equity and diversity. Educators must seize the opportunity to build the confidence and identities of all children through the curriculum and a variety of effective educational experiences that build social capital and cultural awareness. Students need to be aware of their value and learn to nurture perspectives that appreciate both self and the differences in others. Figure 5.7 discusses the role of adults, educators, and students in collective development work (Derman-Sparks and Olsen Edwards 2009).



Figure 5.8. Enhancing equity through personal and collective development work

Community Building and Identity Work

<p>For Adults (Personal Action):</p> <p>Adults have a deep understanding of their own intersecting identifiers and recognize how bias, power and privilege impact each of their decisions. They have a deep understanding of their own stories and the impact those stories have had on who they are.</p>	<p>For Educators (Collective Action):</p> <p>Teachers will nurture each student's construction of knowledge and support the development of confident personal and social identities. Teachers will create brave spaces in their communities for story telling and connection across lines of difference.</p>	<p>For Students:</p> <p>Students will demonstrate self-awareness, confidence, family pride, and positive social identities (mirrors). They recognize the value of honoring others stories and perspectives.</p>
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 (adapted from: Derman-Sparks & Edwards, 2020)

Source: [Roots ConnectED n.d.](#)

While only a small sampling of topics and best practices you could choose from, these are offered as a way to get started. In our final chapter, we offer recommendations for getting started that will summarize our suggestions and organize your thinking about your next steps.

Chapter Six. Recommendations for Getting Started

Getting started can be tough: finding a place to start, charting your course, or choosing your targets all present unique challenges to be overcome. The only real mistake is to never start the journey. Missteps can be forgiven, but inertia is unforgivable when lives and the future of our youth and our nation are at stake. We start from the premise that serving all of the youth in our nation will ultimately best serve the nation's future. Each child has something to offer and we will be poorer for each one we leave behind.

What do we need to drive the changes that the current demands call for? LEAD Tools outlines a useful list of high-leverage tools for managing your journey, presented in Figure 6.1.

Vision comes first. A vision that sees the potential for the highest development for all of our youth is key to setting out on the right path. Once we concede that we will privilege some over others, we have consigned ourselves to a future that falls short of our potential as a nation. Second, we need leadership that can enact the vision. This requires training and support, resources, and community backing for forward-thinking leadership to be successful. When leaders understand how to act with equity and ethics in mind, they can operationalize an equity agenda that meets the needs of all learners. Resource allocation becomes the next pivotal arena. Assessing and reconsidering the use of resources creates opportunities for efficiency and optimization. No one loses when this is

done right. When you improve gifted and talented services and ensure that all teachers know the strategies for extending learning that any strong teacher for the gifted knows, everyone benefits. When you improve special education services and ensure that all teachers know effective strategies for individualizing learning through careful diagnostics that any strong special education teacher knows, everyone benefits. When you improve language acquisition services and ensure that all teachers know how to support language development the way any strong language development teacher knows, everyone benefits. When there is cross-training for teachers, shared professional development, and shared ownership of all students, all students win.

School culture is the battleground where we tend to win or lose when it comes to meeting the needs of students with multiple areas of need and vulnerability. Fostering a school culture that embraces all students, draws in the community to support teachers' efforts, and embraces the challenges of

Figure 6.9. Ten high-leverage equitable practices to address equity needs

Ten High-Leverage Equitable Practices

- Constructing and enacting an equity vision
- Developing organizational leadership for equity
- Modeling ethical and equitable behavior
- Allocating resources
- Fostering an equitable school culture
- Collaborating with families and communities
- Influencing the sociopolitical context
- Hiring and placing personnel
- Supervising for improvement of equitable instruction

Source: [Education Northwest 2012](#).



the community where the school sits are winning strategies. Finally, a human capital strategy that focuses on building a diverse and skilled workforce is central to the task of providing rich instruction that produces equitable outcomes. TA providers to states, schools, and districts must have these core concepts at its core.

Some strategies are presented in useful sources such as the CCSSO 2019 report (Council of Chief State School Officers 2019); the Panasonic Foundation's issues series 'Strategies' 2018 issue 'Leading for Equity'; the 2017 report entitled Tennessee Succeeds: District Strategies report for the State of Tennessee (Tennessee Department of Education 2017).

I. Internal Change/Driving Change

Build an Effective SEA, Starting From Within

The challenge for SEAs is to create direction for educators statewide. This includes modeling organizational practices that shape the people and the work they do in service of education in the state. In light of this, creating a SEA that functions in a way that exemplifies what districts should be and do should be a priority. Focusing on the type of conversations SEA teams and departments can have to drive thoughtful TA to districts is key. Conversations on the impact of poverty on educational opportunity and outcomes as an example can lead to the enlightened application of policy and law and effective service to those most in need. Through forward-looking human resource policy and practice, a SEA can build a staff representative of the population it is serving. The SEA's department structure can be retrofitted to meet the needs of all subgroups served by the SEA. Positions created to help ensure effective service to special populations can help monitor this change. Prioritizing the journey of the SEA can create a more nimble, sensitive, and effective organization that models the highest values of the state.

State Boards of Education have many technical challenges and need to be reminded of the transformational work that's happening constantly. Modeling innovation and flexibility can help districts to see effective examples of adaptive system leadership facing the adaptive demands of a changing populace and industry. Keeping the board abreast of the work is a priority because as they follow the work and offer feedback, they are positioned to be more responsive and connected to the work. It will require that they are willing to be and stay in a space of discomfort in order to make the wanted and needed long-term changes. The goal is "getting people engaged in learning how to solve sticky problems". The state has the platform from which partnerships and collaboration can be launched. Modeling this for districts has great value for creating synergy and shared best practices. TA to districts ought to be about getting partners who can influence the outcomes of tough challenges to think together and come up with creative solutions. Stakeholders of all kinds could be at the table to discuss key initiatives. Organizations like 'Think Together' can be one place to find inspiration (Think Together 2022).



The Power of Networks

The state has the ability to create networks of innovators who are trying to figure out tough issues together, piloting and sharing outcomes data. The most enduring way to undo the systemic malfunctions that cause patterns of underperformance is to create high-functioning systems. Making the school systems statewide able to effectively serve all students is the best way to root out inequities in resource distribution as well as outcomes. The most profound opportunity for any TA is to leave behind a network of practitioners that have built patterns of collaborative mechanisms for thinking through tough problems.

There are differences across districts, but also similarities in challenges that, when collaborating, enable greater possibilities for solutions.

“While each school district is in some regards unique, school system leaders are grappling with sets of challenges that are fundamentally common. Pooling intelligence across districts is a high-leverage strategy whose potential has only begun to be realized.

—Panasonic Foundation 2018, p. 14.

The value of exchange and collaborative focus on equity, across districts, enables more rich and rewarding discussions, understanding, and outcomes... including student experience, professional development growth, and success measures (Panasonic Foundation 2018).

II. Equity Vision and Goals

Retired Panasonic Foundation Executive Director Larry Leverett says, “If we don’t engage in those conversations, we’re not going to be able to address root causes of inequity.” So, if race is driving low performance then it will inevitably have to be addressed if progress is expected. The same is true for poverty, language, or place of origin. “The reality is that Americans have a difficult time engaging in conversations around race,” Leverett says. (Panasonic Foundation 2018, p. 5)

Another example of a superintendent who embraced the issue of race is John Welch, former Superintendent of Highline School District and now Superintendent of the Puget Sound Educational Service District. He says:



“It is an ongoing journey. We hold a vision of eliminating opportunity gaps by leading with racial equity and becoming an antiracist, multicultural organization. This includes a lot of work around exploring the development of historical racism and its impact and understanding how systems have come to reflect the dominant culture through the oppression of others. Once you have that training and knowledge building underway, you can better tackle your systems and structures to make sure they are fair. We believe this work has to get into the bones of the organization, not just in a vision statement, so that every day you can interrupt and even better, dismantle practices that are not supportive of equity. It’s hard work; it’s emotional work; it’s exhausting work; and it’s work that must lead to action. You can talk about race and being antiracist, but you have to take action.”

—Panasonic Foundation 2018, p. 5-6.

This is our challenge, what calls us to action in regard to the issue of race and antiracism. We must engage with the work of the issue of race and antiracism. Not everyone will have the luxury of this forward approach given the political milieu in which they find themselves. Welch felt it was critical not just to pursue equity but also to dismantle the aspects of the system that were actively biased and perpetuating racism. They introduced a racial equity tool for decision making around policies, practices, resource allocation, and hiring to move from words to action. Tools are critical to managing the journey. Training is also significant. In Puget Sound, they completely redesigned their employee onboarding system to train staff in their tools and model right up front and throughout the course of the year.

Shared vision is critical for creating aligned strategies and moving forward. High-leverage strategies can be neutralized by lack of alignment. High-level strategies without cultural competency can lead to strategies that are applied inappropriately.

III. Accountability

Data fuels capacity for growth and solving inequities. Creating capacity for growth requires building a data flow that informs the decisions you need to make. Shifting paradigms provides the opportunity to go beyond proficiency to consider growth. By setting goals for each population you serve, you position yourself for greater success. ESSA emphasizes reporting on school climate, absenteeism, and advanced work. These data can accelerate strategies and overall effectiveness. Data can help districts identify that they are making progress. It can help them build mutual



responsibility and accountability for results. It is important to be intentional about data - work with your team of stakeholders to determine what you need to know and how you will measure it. Talking about data can feel like neutral territory, making for an easier entry point. The focus on improvement is something everyone can rally around.

IV. Differentiated Strategies

Every state and district is different. Each state has to find a way to guide districts in finding culturally appropriate instruction and support material. Tailoring your support requires taking into account the specific needs of each state, its population, and its districts. Grants can be a way to incentivize districts to engage in innovative practices. Remember that each one may have a different landscape requiring a different approach.

V. Resources

It takes resources to make change happen. Districts can use help from SEAs to understand how strategies such as weighted-student funding formulas can help districts navigate the challenging pathways to responding to inequities in their provision of service to all stakeholders in their state. States can help districts make choices that can accelerate solutions to inequities. Creating processes to facilitate decisionmaking can support good outcomes. SEAs can help districts evaluate their options for improving the coordination of services for underserved populations.

“If you’re serious about systemic, sustainable approaches to advancing equity and excellence in your school system, the allocation of resources requires strategic attention.”

—Panasonic Foundation 2018, p. 12.

In Oakland Unified School District, they held to their strategy on the allocation of resources, even if it meant giving up one partner. Welcome partners into the district’s resourcing strategy as a whole, if there’s a fit. Bring stakeholders together to dialogue, understand each other, and understand the change of resource strategy. Making strategic decisions around the allocation of resources requires difficult conversations, including reaching agreement between many stakeholders on the fundamental approach for several things. Two examples are the allocation of instructional coaches and partnerships with outside organizations. To the latter point, raise questions – are we going to look at partnering with an outside organization? How can we prevent them from taking control of the strategy or direction (Panasonic Foundation 2018, p. 12)?

In Sampson County, the leadership changed strategies from spreading instructional coaches widely but thinly to focusing the coaches’ time in schools with the greatest gaps to make the greatest impact. This experience shows the importance of relationships when making changes.



“We needed our more affluent, White parents to believe that our school system is only great when it works well for all students. We needed them to care deeply about the educational experiences of our Black and brown kids. Some parents can get into that space and be supportive of change, and for others, it can be the first time they really stopped to think about it.

“When we were going through budget cutting, we brought our community together and had people sit with people not like themselves: more affluent people sat with immigrants. They would have to reach consensus. That was a really powerful experience because somebody who traditionally had power now had to work through a different process with other people who were in a different situation. They had to listen and hear from one another. At the core of leading for equity are relationships with one another.”

—Panasonic Foundation 2018, p. 6.

VI. Early Education

A comprehensive strategy addressing the needs of early learners can resolve inequities and disproportionalities as a part of a long-term strategy. As long as we fail to deal with the early learning needs of disadvantaged children, problems with disproportionality could continue indefinitely into the future. We must carefully interrogate the sources of disproportionality because avoiding the true sources of disproportionality can lead to the persistence of longstanding problems. If racial prejudice is at the root of the problems within a district, it will be counterproductive to avoid addressing it. It can be difficult to deal with deficits in early learning or disproportionate suspensions without acknowledging the role of race in the making and potential solving of the problem. The challenge is to find a language and approach that suits each locality, polity, and social circumstance. If there is a language that better suits the situation, use what works. If talking about universal education for all students works better than talking about equity, then do it. Many states have models and strategies for early learning, such as Tennessee’s Early Learning Model. These strategies help build the vision and strategy for high-quality literacy practices and ensure early literacy success.



VII. Standards and Assessments

Actionable feedback is essential for systems to improve performance, help students reach standards, and align systems to meet accountability goals. The question to each state and district is how well they can meet the differential needs of students who may be poor, in a minority group, or underrepresented. The goal should be for all students to have rich and rigorous learning opportunities. With that goal, the data can illuminate whether all students are reaching high standards. Teachers' capacities to help students meet academic standards require careful attention. Using data, particularly from formative assessments, can set a system up for success, but it may require retooling for districts to adapt their systems to ensure that all students succeed.

VIII. Human Resources

Professional learning is essential to sustaining a carefully recruited, diverse staff. Diversity among staff can help staff at the state and district level be representative of the population they are serving.

City, Elmore, Fiarman, and Teitel, authors of *Instructional Rounds in Education*, identify four essential elements of instructional rounds: 1. Leaders of the school to be visited identify a problem of practice that is visible in the instructional core and pertains to the school's and/or district's overall strategic direction in advance of the rounds visit. 2. Observers visit classrooms while teaching and learning are taking place and gather detailed and nonjudgmental evidence that relates to the identified problem of practice. 3. The teams that collect evidence in classrooms share and analyze their findings in an observation debrief, identifying patterns that shed light on the problem of practice. 4. Drawing on the evidence and patterns, participants brainstorm preliminary "next level of work" considerations for using resources to make progress on addressing the problem of practice. 'Instructional rounds' counter the isolation that is typical of educators, who are too often left alone to try to address issues without the benefit of multiple experiences and perspectives from their peers (City et al. 2009). Figure 6.2 presents further discussion of equity rounds.



Figure 6.2 A key for culture change in schools: Equity rounds

"A powerful driver in re-culturing Jersey City Public Schools was the adoption of equity-focused instructional rounds"

- Instructional Rounds: direct observation of classroom practice by small groups of educators and a debriefing process where evidence gathered from observations is organized into patterns
- Aimed to counter the isolation that is typical of educators, who are too often left alone to try to address issues without the benefit of multiple experiences and perspectives from their peers
- Part of the cultural influence of the system-wide adoption of instructional rounds has been the development of a common language across the system

Culture change takes more time than we think.

Source: [Adapted from Panasonic Foundation 2018, p. 8.](#)

Effective recruitment strategies are challenging to implement. Retaining staff requires attention to culture and opportunities for continuing learning for all staff. Culture makes a place for all staff to feel welcome and empowered. Learning opportunities ensure that all staff continue to learn to engage with the diversity around them in colleagues and students as well as learn new instructional and pedagogical models. Diversifying the workforce requires these creative strategies. SEAs can hold space for districts to discuss how to develop their workforce and comprehensive human capital systems to hire and sustain effective educators.

IX. Culture and Conditions for Learning

SEAs can help districts understand how to build cultures that support learning and healthy environments for learning and work. Building an equitable school system requires careful attention to school culture. The primary leadership role is shaping the culture. Building capacity for culture management requires building cultural competency – increasing the propensity for staff to be comfortable engaging on issues of culture and difference. This requires that leaders are culturally competent and aware of the culture and how to influence it.

“Too often we rush to solutions, craft technical responses, and engage in implementation without ever examining the soil into which the initiatives are being planted. A toxic culture results in spoiled fruit.”

—Panasonic Foundation 2018, p. 6.



Staff need support to make social and emotional learning a priority. The elements of culture must be attended to consciously, including considering issues such as restorative justice and alternative discipline practices. Strategies are a natural component to success in improving performance. You may have the best strategy possible, but if it is not positioned well in the culture of an organization, then it can come to nothing.

X. Educational Outcomes

Many states embrace the reality that they have results that are predictable by race, despite their efforts to close gaps. Underserved populations typically have less instructional time than others due to absence or discipline issues and as a result, for this and other reasons, they may be off track for timely graduation or score less well on standardized tests. Some states, like Tennessee, have chosen to increase the quality of core instruction and articulate intensive intervention strategies to mitigate these problems. Using multi-tiered systems of support, these states have prioritized the needs of struggling students. SEAs can support dialogue on strategies such as open-enrollment options, inter-district choice, and supporting that all schools, including charters, are meeting the needs of students in special education, English-language learners, and other special populations.

As part of a multi-tiered system of support, emphasizing Tier 1 inclusion for all students can have profound positive effects in conjunction with a multi-tiered strategy. Alignment of pathways from early learning to postsecondary levels can create a safety net for students who otherwise may slip through the cracks. Early college or other postsecondary experiences have shown positive effects on graduation rates. Opportunities to think outside the box and create alternative pathways aligned with postsecondary and career opportunities can be facilitated by SEAs who are helping districts make a paradigm and culture shift in service of meeting the needs of all students.

It's important to remember that no one strategy or resource guide will solve every equity challenge. The key is to build a diverse team of stakeholders invested in the success of your schools and the students you serve. Build that team's capacity to discuss, plan for, and implement the tools and solutions shared in this report. This is a journey. If one solution doesn't produce the necessary results, keep going. Build your team's capacity to discuss, plan for, and implement the types of tools and solutions shared in this report. Remember, it is a journey, and no two pathways will be the same.



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