Inclusive Innovation

Eight Districts' First Year Journey to Creating School Systems for All Learners

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Bellwether

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Executive Summary

The path to an excellent, high-quality education can be complex for students who have been historically and systemically excluded, including students of color, students experiencing poverty, students with learning differences, and multi-language learners.[1] Many educators around the country recognize these inequities in United States public education and strive to transform the system to ensure access to a high-quality education for *all* learners. The need to break down systemic barriers is even more urgent now, as the COVID-19 pandemic exacerbated existing gaps.[2]

The global nonprofit **Digital Promise** is contributing to this change by supporting school districts in developing systemic solutions through Inclusive Innovation — an equity-centered, multiyear research and design process that engages communities collaborating with educators and district leaders to co-research and co-design solutions to education challenges.

In 2020, Digital Promise tested this theory by launching the Equitable School Systems Transformation (ESST) Initiative, engaging eight K-12 school districts nationwide to address specific equity challenges within their districts through a multiyear process of system transformation by:

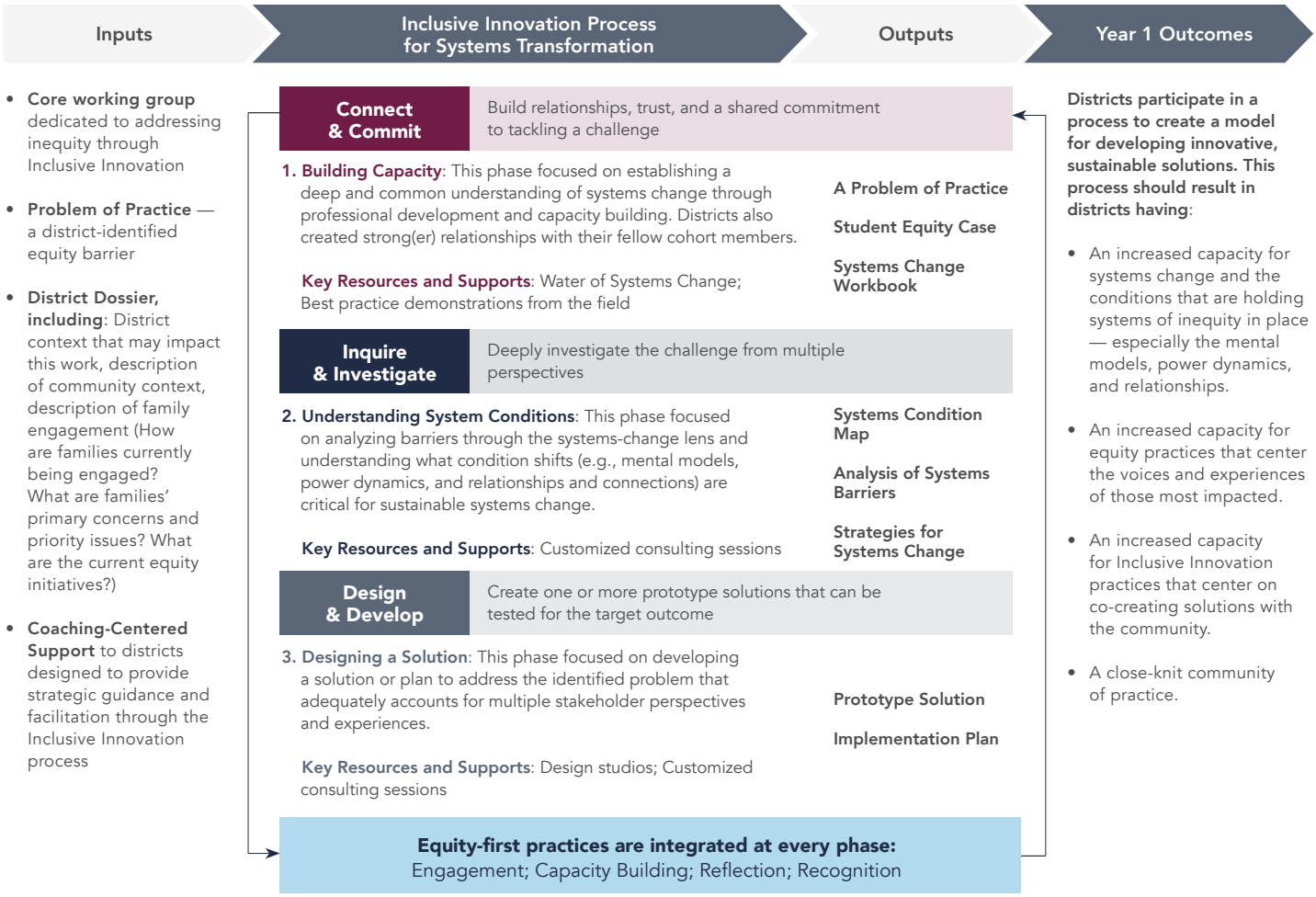
- Researching and analyzing a **Problem of Practice (PoP)** selected by each district for equitable systems redesign.
- Engaging in a set of **collaborative learning processes**, supported by coaches, to inform the design of a framework for equitable systems change.
- Creating a **prototype solution** to address each district's PoP.
- **Scaling the framework, solutions, and learnings** from this Inclusive Innovation process to districts across the country.

ESST gives participating districts several supports, including a clear framework for education systems change; exposure to diverse models of systems transformation from the U.S. and countries around the world; deep, customized coaching in the context of each district's PoP; and a collaborative design process to ideate, prototype, and develop solutions (Figure 1).

The inaugural year of ESST led to a number of promising practices among participating districts. Principally, the level of authenticity emerging from a systems-level Inclusive Innovation approach differentiated Digital Promise's program from others in the diversity, equity, and inclusion (DEI) space. As one ESST participant said:

> ***"This [Inclusive Innovation] experience was different from others because it felt very authentic. You went through a process and really explored solutions. It was very intentional from the beginning of what we were trying to accomplish. This was the first time in my 20 years of experience that DEI, design thinking, and system transformation were presented in a connected manner. In the past, it's always been a canned experience."***

FIGURE 1: ESST INITIATIVE LOGIC MODEL



Overall, the experiences of districts working through the first year of the ESST Initiative highlight that, for districts interested in creating transformative change to address systemic inequity, it is critical to:

- Include multiple voices from district leadership and the community to co-design solutions.
- Invest substantial time (ideally with expert coaching) to uncover implicit barriers and begin to shift mindsets.
- Be willing and open to work as part of a cohort of districts to share ideas and strategies.

Year 1 of the ESST Initiative shows that following these principles will take time, but participating districts acknowledge that the investment was worth it because they were able to begin developing deeper and more sustainable solutions to entrenched problems than they had in the past. Their experiences and lessons learned provide a valuable roadmap for other districts interested in developing durable, transformative solutions to increase equitable access to high-quality education for all students.

Throughout the past year, Bellwether partnered with Digital Promise to document the districts' journey through the ESST Initiative process and capture lessons. This report provides a detailed description of the first year of implementation of ESST (2021-2022), including an overview of the processes driving Inclusive Innovation and resources from the work that may be useful to other educators. We conclude with key takeaways that can inform the work of other school systems seeking to use an Inclusive Innovation approach to drive equitable systems transformation around the country.

Introduction

According to the Department of Education, the United States public education system is designed to "promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access."[3]

However, access to an excellent, high-quality education is too often unavailable to students who have been historically and systematically excluded, including students of color, students experiencing poverty, students with learning differences, and multi-language learners.[4] Education laws, policies, and practices do not always meet the needs of all learners.

Schools serving larger proportions of historically and systematically excluded students frequently receive a fraction of the resources that other schools receive, which impacts the quality of learning materials, facilities, and the teacher workforce.

Many educators around the country recognize these inequities in the U.S. public education system and strive to transform the system to ensure access to a high-quality education for *all* learners. The need to break down systemic barriers is even more urgent now, as the COVID-19 pandemic exacerbated existing gaps.[5] The challenge for those aiming to create systemic change in schools is how to design equitable solutions that are transformative and durable.

Digital Promise proposes that, to meet the challenge of addressing systemic inequities, educators must engage in Inclusive Innovation, an equity-centered process in which district leaders collaborate with communities to co-research and co-design equitable solutions. Inclusive Innovation is grounded in the theory that, by working with the people in the community who are most affected by systemic inequities, educators can better define and target the core problems, thereby creating more effective and lasting change.

In 2020, Digital Promise tested this theory by launching the ESST Initiative, engaging eight K-12 school districts nationwide to address specific equity challenges within their districts through a multiyear process of system transformation by:

- Researching and analyzing a **PoP** selected by each district for equitable systems redesign.
- Engaging in a set of **collaborative learning processes**, supported by coaches, to inform the design of a framework for equitable systems change.
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Equitable School Systems Transformation Through Inclusive Innovation

Defining Systems Transformation

The goal of the ESST Initiative is to support districts working in partnership with communities to address problems of educational inequity by designing system-level solutions. Systems transformation may have different meanings for different organizations and fields.[6] Examples of education reform or change that have been considered systemic in their approaches include comprehensive education reform,[7] collective impact,[8] and a range of coalition-building efforts.[9]

Although it can be hard to pinpoint a single definition of systems transformation in education, the process often involves:

- **A multi-stakeholder approach**, including the participation of policymakers, teachers, parents, students, etc.
- **A recognition of a challenge** that is having adverse effects on students' ability to achieve and thrive.
- An understanding that education systems are **complex, multidimensional institutions** that involve different interrelationships and interdependencies among people.
- An acknowledgment that **change requires more than just the implementation of discrete policies and programs**; it also necessitates a shift in the way people relate to each other and the way they think of the problem and solution.
- A common understanding of how the **different components and stakeholders of a system** interact and impact each other.[10]

Systemic approaches have become a focus for many districts seeking change, particularly around issues of equity.[11] Districts are eager to engage in systems design initiatives that will ensure that all students thrive.

Although systems change will ultimately require the implementation of new policies, programs, and practices, a true shift must involve more fundamental changes to mindsets and relationships among stakeholders across the system — especially those who hold power. The task for the ESST Initiative is ambitious: to identify the systemic cause of the problems inhibiting districtwide success for all students and also develop solutions that will endure beyond one or two policy cycles.

Inclusive Innovation as a Model for Education Systems Transformation

In 2020, Digital Promise launched the Center for Inclusive Innovation with the vision of resourcing the creative ingenuity of communities collaborating with schools to transform education.

Inclusive Innovation is an equity-centered research and development process that engages educators, students, parents, and community members in co-researching and co-designing solutions — new programs, policies, and practices. Inclusive Innovation emerged from Digital Promise's work with schools to address the need for tools, systems, programs, and models that can support all students equitably. The process is based on the premise that traditional approaches to

education innovation — specifically those developed by people in positions of power and outside of local school communities — do not always meet the needs of all students because they do not incorporate the lived experience and cultural wealth of the intended users. Inclusive Innovation closes this gap by making collaboration the key to working through education challenges.

Inclusive Innovation engages participants in five progressive stages: team formation, problem identification, solution ideation, solution development, and implementation. The process starts with a Connect & Commit stage, during which the participants build relationships and mutual trust and make a shared commitment to the goal of achieving equitable outputs and outcomes. During the second stage, Inquire & Investigate, participants begin to identify the core PoP, desired outcomes, and the metrics they will use to measure the progress of the innovation. In the third stage, Design & Develop, participants create a prototype solution through an inclusive human-centered design process. In the fourth stage, Implement & Iterate, the prototype is introduced and monitored to assess its impact. During the final stage, Sustain & Scale, the solution is refined and then scaled within the district and/or to other districts (Table 1).

The cycle is further guided by four crosscutting practices that center equity: Engagement (collaboration built on mutually beneficial relationships), Capacity Building (valuing community members as co-experts and building team capacity to implement practices), Reflection (check-ins to ensure continuous improvement), and Recognition (celebrating progress in addressing challenges).[12]

TABLE 1: DIGITAL PROMISE'S INCLUSIVE INNOVATION PROCESS

	Connect & Commit	Inquire & Investigate	Design & Develop	Implement & Iterate	Sustain & Scale
Goal	Build relationships, trust, and a shared commitment to tackling a challenge.	Deeply investigate the challenge from multiple perspectives and arrive at target outcomes for addressing and measuring progress against the challenge.	Create one or more prototype solutions that can be tested for the target outcomes.	Implement one or more prototype solutions that can be tested for the target outcomes.	Implement refined solution(s) in multiple contexts, improving local implementations and gathering knowledge for scaling.
Equity-first Practices	Engagement				
	Capacity Building				
	Reflection				
	Recognition				

Genesis of the ESST Initiative

The seeds of the ESST Initiative were planted in 2019 when, in partnership with the Asia Society, Digital Promise engaged eight school districts from their League of Innovative Schools network to travel to Toronto to learn how the city's 250,000-student district was designing and implementing bold DEI reforms in collaboration with the community. The district's Enhancing Equity Task Force had just issued a report that made clear recommendations on topics ranging from instituting restorative justice discipline practices for students to more equitable hiring and promotion policies for staff. The Task Force also emphasized the importance of a systemic approach to creating and implementing programs and policies that would lead to change. The authors of the report stated that such a "strategic and coordinated approach will lead to the thoughtful, intentional, systemic and cultural shifts necessary to make an enormous difference in schools and classrooms."[13]

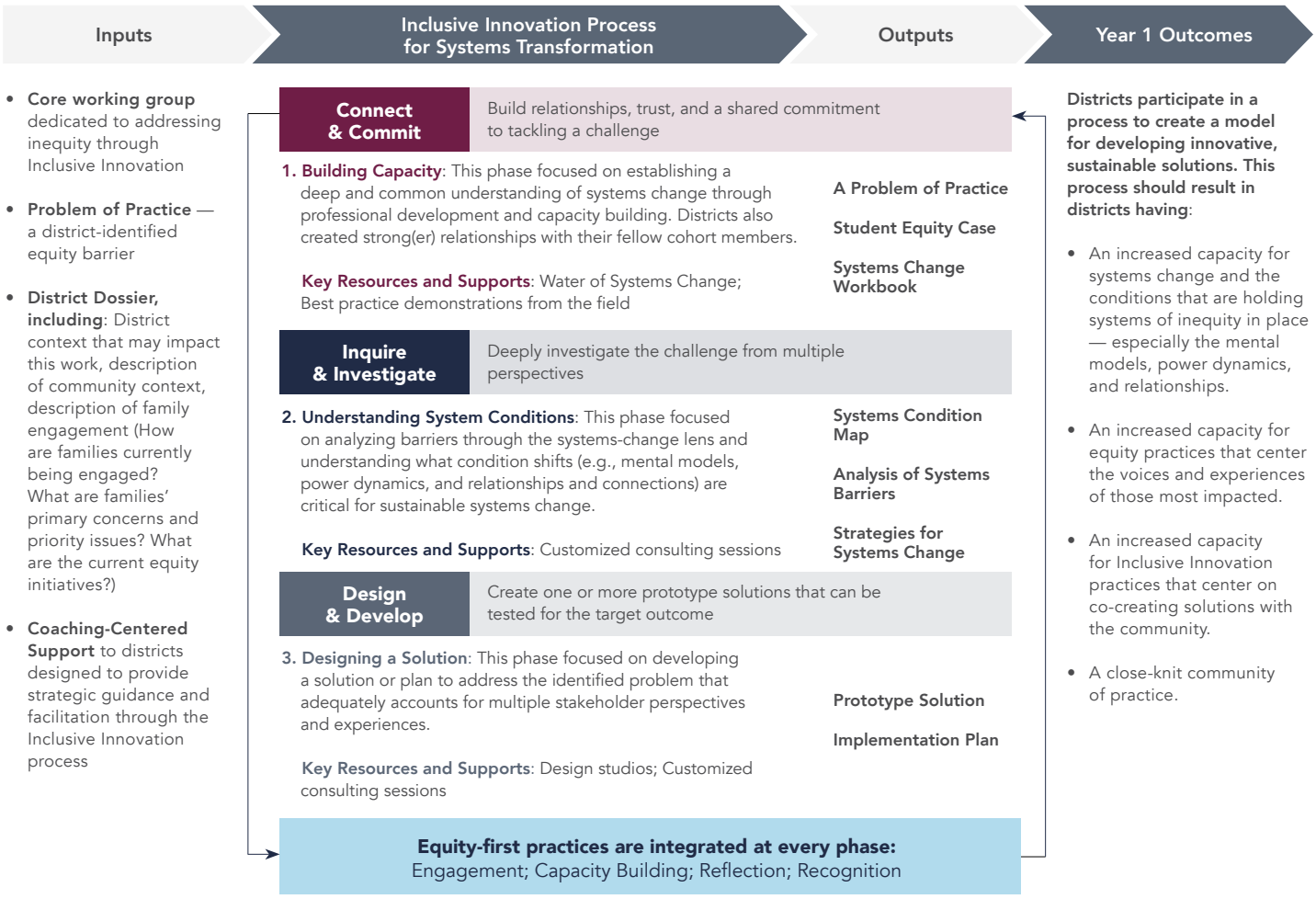
The trip provided an opportunity for the U.S. district leaders to see how other countries engage in creating equitable systems and consider how they might incorporate similar approaches within their own districts. During the trip, district leaders reflected on their existing equity practices and imagined how a systems approach, as opposed to a more programmatic- or policy-specific approach, could lead to robust changes in the way schools meet the needs of marginalized students. The eight participants returned to the U.S. excited about the possibility of engaging their staff and communities in systems transformation. Building on this excitement and desire to collaborate, Digital Promise launched the ESST Initiative to provide continued learning and support for this committed group of leaders.

Lessons Learned From the First Year of Implementation

ESST Initiative Theory of Change

Digital Promise's systems transformation theory of change for Year 1 of ESST posits that incorporating strategic supports aligned to the Inclusive Innovation model — taking time to build relationships, trust, and a shared commitment to tackling a challenge; providing customized coaching for districts to deeply investigate the challenge from multiple perspectives in collaboration with students, parents, and community members; and creating prototype solutions that can be tested for the target outcome — provides the basis for districts to develop sustainable equity-centered solutions that can transform school systems (Figure 1).

FIGURE 1: ESST INITIATIVE LOGIC MODEL *(as seen in the Executive Summary)*



Engaging Expert Partners to Drive the Work

In Year 1, Digital Promise selected a group of partners with deep, complementary expertise in systems change, systems-level equity coaching, and global education equity models, and aligned their expertise to the first three phases of the Inclusive Innovation model (Appendix D, Table A1). The partners enabled the districts to build capacity by providing framing, guidance, and real-world demonstrations to inform their systemic and culturally responsive approaches to solution design. The partners included:

FSG

A consulting firm that works with corporations, foundations, and nonprofits on strategy and problem solving, focusing on systems change, DEI, and collective impact. FSG provided an overview of its Water of Systems Change approach and one-on-one coaching with the participating districts.

The Asia Society

A nonprofit that houses the Center for Global Education, an organization that seeks to address education inequities around the world through programs and research. The Asia Society designed the initial Toronto study tour and delivered a global learning series to share emerging best practices from DEI initiatives in different countries, including the United Kingdom, New Zealand, and Canada.

Project for Education Research That Scales (PERTS)

PERTS is a nonprofit institute that helps educators apply evidence-based strategies to advance educational excellence and equity on a large scale. PERTS provided information about and access to two of their professional learning programs, Elevate and Catalyze, which use surveys to amplify stakeholder voices and provide professional learning strategies to help educators create conditions that support equitable outcomes.

Dr. John Malloy

Malloy, a former director of education for the Toronto District School Board and current superintendent of the San Ramon Valley Unified School District in California, provided ongoing expertise on engaging diverse community members, particularly those not actively engaged with the school system. Malloy was the participants' main contact during their visit to Toronto in 2019 and continues to be a resource for the ESST Initiative.

Dr. Lisa Williams

Williams is a former district equity leader in Fairfax County, Virginia, and Baltimore County, Maryland, and is currently an equity consultant. She coached the district leaders to delve deeper into existing mindsets and find opportunities to change mental models and relationships to achieve equitable systems change.

Implementing the First Year of the Initiative

The original plan for Year 1 of the ESST Initiative was to guide participating districts from the Connect & Commit stage through the Design & Develop stage and begin preparing for implementation in the fall of 2022. However, the pandemic and other factors slowed the rate of the work. Instead, Year 1 focused on building a foundation for capacity-building centered on the systems change framework, exposing participants to equitable systems models, and coaching and ideating solutions. As of the writing of this report, ESST districts are designing solutions and will continue developing their prototypes through the 2022-2023 school year, with the goal of implementing them in 2023-2024.

This section describes the core activities, work products, and lessons learned from each of the four phases completed during the first year: District Onboarding & Preparation, Connect & Commit, Inquire & Investigate, and Design & Develop.

1. District Onboarding & Preparation

FOCUS AND CORE ACTIVITIES

This initial phase focused on setting the foundation for the work. Participants gathered materials to provide foundational information about their districts and community context and worked on defining their PoPs.

KEY LESSONS FOR SCHOOL DISTRICTS

Systemic solutions require inviting multiple perspectives to the table.

The participating school systems engaged teams of district leaders, including superintendents, assistant superintendents, staff focused specifically on DEI initiatives, human resources staff, accountability officers, and representatives from other departments. One district collaborated with its state department of education.

No two district teams participating in the ESST Initiative looked alike. Some teams had deep experience working on DEI before joining the ESST cohort; others were newer to the work. In general, having many district leaders at the table made the process more adaptive and enabled them to pivot on ideas when needed. The presence of senior leaders also brought a strong sense of legitimacy to the work.

In addition, representatives from each of the participating districts held monthly cohort meetings to share best practices and challenges. During interviews, participants remarked on how important it was to have partners from other districts with whom they could share ideas and benchmark their progress.

Creating an effective systemic solution starts with defining a clearly articulated, evidence-based PoP.

Each of the participating districts identified a PoP and continually refined it as they evaluated conditions anchoring it in place (Table 2).

District Onboarding & Preparation: Work Products

1. **District Dossiers**: Each district created a dossier that outlined important data (e.g., demographics) and other contextual information about their schools, staff, and community. These documents helped the districts focus on the needs of students furthest from opportunity, reflect on the impact of equity initiatives to date, and identify areas of growth.

2. **Defined PoP**: Each of the participating districts also provided their PoPs as part of their District Dossiers.

Each PoP centered on an equity issue within that district and fell into one of three categories:

Health and Well-Being
The health and social-emotional needs of all students, ensuring that historically and systematically excluded youth are considered in the design to provide a foundation for learning for students with the highest needs.

Equitable Learning Pathways
The design of learning systems to support the access, growth, and development of all students.

Teacher Cultural Development
The capacity and cultural competency of teachers to promote the identity development and self-efficacy of all students.

The PoPs were the central focus of the participating ESST districts throughout this initial year of the Initiative. During the coaching sessions in the Inquire & Investigate stage of the process, the districts went through several iterations.

As one district leader described the general process:

> ***"Thinking back to the 2019-2020 school year, we had a lot of conversations around equity in the fall of 2019 and a lot of different projects, but I think one of the things that the ESST experience offered was this opportunity for us to have a resource and a consortium to really fine-tune some of our work related to diversity, equity, and inclusion."***

Districts reported that the process of defining a PoP helped them distill a host of different challenges related to equity into a core area that they felt had been a major barrier to student success, often for a long time.

Overall, the participating districts were able to use the process of developing their PoPs to further narrow the focus of the long-term DEI efforts that they had been working on.

TABLE 2: ESST INITIATIVE DISTRICT PROBLEMS OF PRACTICE

Category	Final PoPs
Equitable Learning Pathways	How can the district intentionally increase high school graduation and completion rates of college-ready courses among English language learners (ELLs)?
	How can the district create equitable college and career experiences to give Black and brown students life-ready skill sets?
	How can the district diversify its workforce to make it more representative of student demographics and experiences?
	How can the district strengthen the alignment of policies and practices to create culturally sustainable school systems?
Teacher Cultural Development	How can adults in the district develop the capacity and cultural competency to promote the identity development and self-efficacy of Black and brown students?
	How can the district identify teacher leaders who use strong antiracist pedagogy and prepare them to share their practices throughout the district?
	How can the district prepare teachers and staff to be culturally proficient and competent?
Health and Well-Being	How can the district address the disproportionality in its exclusionary discipline data for Black and brown students?

2. Connect & Commit: Foundational Capacity Building

FOCUS AND CORE ACTIVITIES

The focus of this stage was to provide participating districts with a common framework for understanding systems change and help them connect and commit to the mission, the cohort, and the value of community collaboration in systems transformation. During the Connect & Commit stage, each district participated in a wide range of capacity-building and professional development exercises to orient themselves in both systems change and Inclusive Innovation. They learned about the systems transformation process and how it is differentiated from other types of education reform and change processes. This time was also spent learning about each district's PoP.[14]

KEY LESSONS FOR SCHOOL DISTRICTS

By providing participants with an actionable framework for understanding transformative change, the ESST Initiative helped districts clarify the difference between a systems-level and a problem-level approach.

Digital Promise's partner, FSG, was instrumental in facilitating a shift in participants' thinking during this stage by presenting its Water of Systems Change framework. According to FSG, this approach is designed for institutions that seek systems change in the pursuit of greater equitable outcomes.

The FSG framework rests on the idea that, although systems change can take place on multiple levels, the most durable forms of change are the opportunities that are least visible, or implicit. Implicit changes are more transformative because they occur at the mindset level (FSG calls these "mental models"), where deeply held beliefs and assumptions influence one's actions and behaviors. **Implicit changes** are thus more durable than **explicit changes** (which happen at the level of policy or programs) or **semi-explicit changes** (which happen at the level of relationships and power dynamics). When people are invited to consider systems change at the mindset level, their broader perspectives open up opportunities for designing enduring paths to transformation.

One way to think about the FSG systems approach is to apply it to a certain PoP. Take, for example, the need for a more diverse teacher workforce, one that is representative of the student body. The more explicit and obvious change would be hiring more teachers of color, rebalancing the workforce. However, from a systems perspective, one might ask whether this is a durable step. In particular, does this action address the fundamental or root reasons for the lack of teacher diversity? Why are teachers of color not coming to or staying in certain districts? Is there something about the working conditions in certain districts that may be

Connect & Commit: Work Products

Each participating district created a workbook that encompassed two exercises:

1. **Student Equity Case**: Each of the eight districts developed a "student equity case," a depiction of a target student, their context, and the challenges and opportunities they encounter (internal beliefs, external circumstances, motivations, fears, etc.). The equity case grounded each district's PoP in the student perspective and experience (Appendix B).

2. **Six Conditions of Change Action Learning**: Through an action learning exercise, school system teams: a) identified five-year outcomes that are commensurate with their PoP and considered the context established through the student equity case; b) brainstormed the conditions that are holding their PoP in place and hindering their progress; and c) outlined potential strategies aligned with their aspirational outcomes.

influencing teacher turnover? A systems approach might address this issue by looking, for example, at the support structures in place for teachers of color and ask if there is a need for more mentorship.

When addressing equity specifically, a systems approach seeks to challenge the actual conditions that undergird a PoP and keep it in place. Within such a context, "organizations should be prepared to see how their own ways of thinking and acting must change as well."[15] Digital Promise theorized that the Water of Systems Change approach was a foundational place to start the work of the ESST Initiative because it invited districts to start thinking about how they perceive the problem itself. ESST participants worked to unpack the six conditions that FSG says must be considered for true systems change.

Participating districts reported that, as they grew in their understanding of the Water of Systems Change framework, they began to identify more clearly the difference between a systems issue and a practice- or problem-level issue. They also began to identify how the ideas from the Water of Systems Change approach applied to their own context as they compiled the information for their student equity cases and their workbooks. As one district leader remarked:

> ***"Prior to the [Inclusive Innovation] experience, we would focus on two or three things. Looking back and reflecting, we were probably missing some very broad systemic things that needed to be addressed as well. It's really shaken us up from a leadership perspective, especially me as a superintendent, to understand the idea of systems change and to try to upskill myself in this notion of systems thinking so all the wheels are working together, [instead of working] on one of the spokes."***

The participants explained that talking about explicit versus implicit conditions for change helped them see how a holistic approach is needed to effect durable change that will last beyond a one-off policy change (Figure 2). One participant said:

> ***"Before, we went with what was already known, if you will. Now, we have this theory because the ultimate goal would be sustainability. We don't know what tomorrow's going to look like. [The school] administration may change or schools may change, so it is sustainability. How do we build this in a way where the initiative is sustained, where practices around equity are sustained no matter who's in the building?"***

FIGURE 2: SIX CONDITIONS OF SYSTEMS CHANGE[16]

1. **POLICIES**: Government rules, regulations, and priorities that guide its and others' actions
2. **PRACTICES**: Organizational and practitioner activities that reflect their values and priorities
3. **RESOURCE FLOWS**: How money, people, knowledge, and information are allocated and distributed across a system
4. **RELATIONSHIPS & CONNECTIONS**: Quality of connections and communication occurring between system players
5. **POWER DYNAMICS**: Which individuals and organizations hold decision-making power, authority, and influence
6. **MENTAL MODELS**: Deeply held beliefs and assumptions that influence one's actions

Structural Change *(explicit)*

Structural Change *(semi-explicit)*

Transformative Change *(implicit)*

3. Inquire & Investigate: Building More Research and Evaluation Capacity

FOCUS AND CORE ACTIVITIES

During this stage, after learning about the Water of Systems Change model, the districts moved from a focus on explicit changes (policies and practices) to semi-explicit changes (relationships and power dynamics) to more implicit changes (mental models). The Inquire & Investigate phase moved away from theoretical discussions and began applying the ideas from the Water of Systems Change model by creating systems maps of their districts' PoPs and then working to unpack barriers and start to develop strategies.

KEY LESSONS FOR SCHOOL DISTRICTS

Customized coaching was instrumental in helping participants realize the essential role that mental models play in creating transformational change.

To support the districts in understanding, defining, and analyzing their PoPs, FSG led each district through customized coaching and strategy sessions aligned to the Water of Systems Change framework. Each district defined conditions underlying their own PoP at each level of the map: explicit, semi-explicit, and implicit. The key questions the participating districts grappled with during these sessions were:

- Why did you select this particular PoP? How does it compare with other issues that your district is currently facing?
- What is the context of the PoP? How did you get there? Who is involved in this process?
- How have you addressed these issues already? What has worked and what has not worked?
- What are the possible solutions to the problem?
- Who will be needed to tackle different problems? (Also, given the context of COVID-19, who is available?)

Inquire & Investigate: Work Products

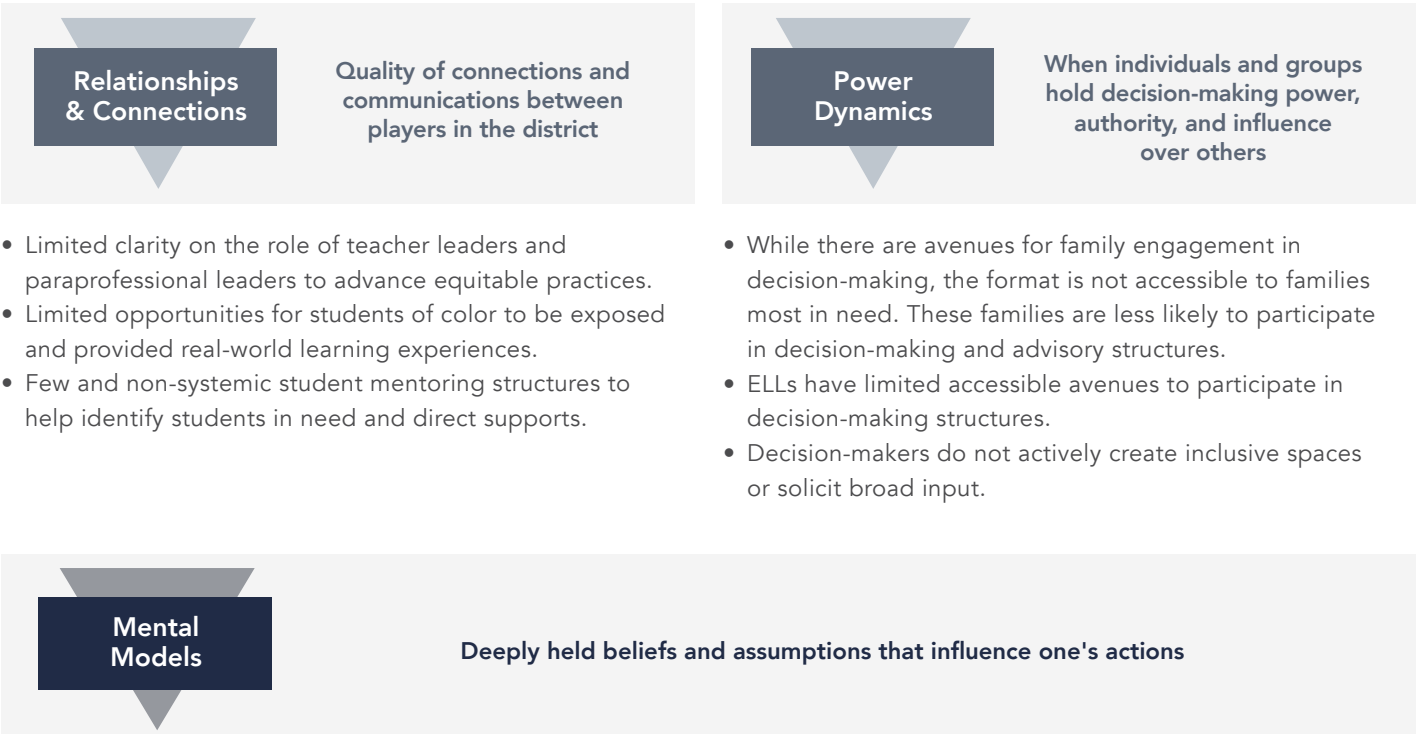
1. **Systems Conditions Map**: Each district developed a persona of a student facing challenges in school and rooted their systems map in imagining the conditions that are impacting the student's ability to be successful and thrive. The map identified conditions at the explicit, semi-explicit, and implicit tiers — and served as the foundation for identifying the mental models as the focus for the "solution sandbox."

2. **Analysis of Barriers and Strategies**: Each district developed an understanding of the deep barriers correlated to each condition and began to imagine strategies to address them.

Participants described the FSG coaching sessions as a unique and powerful process. While the discussion may have included an understanding of the explicit conditions (policies, practices, resource flows), the core implicit conditions (relationships & connections, power dynamics, mental models) emerged as the foundational opportunities for systems change. The result of the work with FSG was a **systems map** that outlined the prevailing conditions the district must address in systems transformation at each tier of the systems change model. District participants reported that creating the systems map helped them more fully understand the underlying layers that are the true levers for transformation (Figure 3).

From the systems map, Digital Promise identified a **"solution sandbox"** for each district — the focus area for the systems change solutions. Because the explicit and semi-explicit conditions are core to systems change, the solution sandbox for each district focused on the mental model as the key lever for transformation.

FIGURE 3: DIGITAL PROMISE'S SAMPLE SYSTEMS MAP WITH SYSTEMS-LEVEL CONDITIONS



Source: *Digital Promise.*

To deepen each district's understanding and analysis of mental models, Malloy and Williams provided one-on-one coaching sessions on equity and community engagement. As the former superintendent of the Toronto District School Board, Malloy has experience in deep community engagement and collaboration in addressing equity challenges and designing solutions. He met with each district leader to understand its community engagement strategy and provide insights on how to build a collaborative engagement approach. Williams coached participants on viewing their districts' mental models, relationships & connections, and power dynamics through an equity lens. She also engaged them in identifying solutions through "liberatory dreaming," which involved envisioning what changes in their districts would look like for students.

The process allowed participants to imagine potential opportunities that in the past may have seemed impossible.

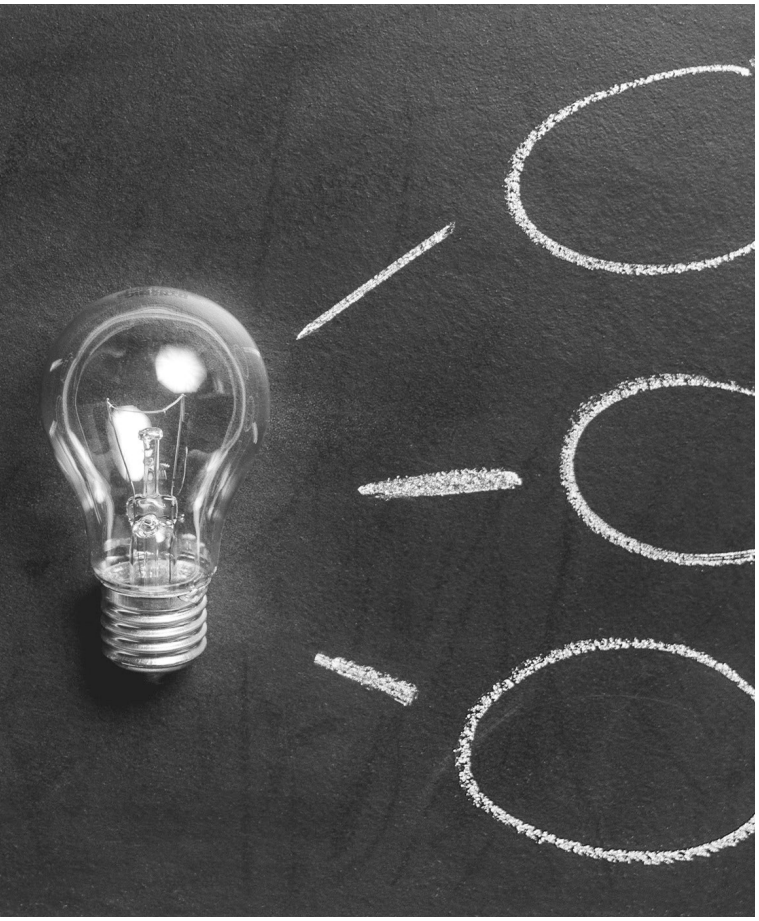
According to participants, the deep one-on-one coaching on mental models was instrumental in changing the way they think about addressing issues in their districts. For example, one participant explained that in the past, they discussed the performance of Black and brown students in college prep courses. The focus was always on the ability of the students themselves to get through the material. However, after participating in the Inquire & Investigate stage, district leaders began to see other factors that are equally relevant.

One district leader reflected:

> ***"Before, we didn't have enough BIPOC students taking physics. To address this in the past, we would have probably only looked at the prerequisites and how they were impacting the situation. Now, we are thinking about the professional learning of the adults, their perception of the students [and their abilities], and the systems-level change that needs to happen."***

The same leader further remarked that:

> ***"ESST was an opportunity for us to capture some of the adult mindsets and behaviors that needed to shift."***



The work with FSG also encouraged districts to reflect on the broader implications of policies to support DEI. As one district leader remarked, the issue is not that policies to create more equity in the past were bad or ill intentioned. Rather, they were inadequate because they lacked the proper conditions of accountability that supported effective implementation:

> ***"I think our definition of equity, especially in education, is that when educators look at equity they think that equity is 'Oh, I feel sorry for Jackie,' instead of saying, 'Let me have this high expectation for Jackie, Jackie can meet this.'***
>
> ***But they use Jackie's [social context] to define how they're going to support her ... I truly believe that the accountability measures we have in place are flawed because we don't use them. We are very masterful, I would say, at creating policy language, but not at unpacking that language and having that language really become active so that we can actually see it."***

In other words, for durable change, leaders can't just change the policy; they also have to change the way they think about the issue and the policy solution to ensure its success. During these sessions, coaching pushed the district participants to go deeper — to identify the levers that led to the inequitable policies or practices that were affecting students.

One challenge for this phase of work was the lack of adequate data to provide more context to the PoPs. Although districts were able to engage in productive consulting sessions with FSG, it would have been ideal to have more substantive data and perspectives included in the conversations, but the pandemic posed significant challenges. In the future, Digital Promise would like to see more data used in the Inquire & Investigate phase, so the hypotheses around DEI issues would be based more on evidence and less on anecdotal information.

4. Design & Develop: Creating Innovative Solutions

FOCUS AND CORE ACTIVITIES

Design & Develop represents the final stage of the first year of the ESST Initiative. Originally, the districts were supposed to conceive of and develop their solutions in collaboration with community members. However, because this phase was delayed in Year 1 due to the pandemic, as of the writing of this report, the districts engaged in the first part (participating in a series of Digital Promise-led Design Studio workshops to guide the process of solution defining and ideation). The work is ongoing; development of the prototype solutions will take place during the 2022-2023 school year.

KEY LESSONS FOR SCHOOL DISTRICTS

Incorporating community voices was critical to testing emerging ideas and co-creating authentic solution ideas for transformational change.

In this stage, each district participated in a series of Design Studio workshops: in-person or virtual sessions facilitated by Digital Promise in which districts collaborated with community members that they had invited to identify the actions (solutions) to create the conditions for transformation. The community members brought the voices and perspectives of those who are directly experiencing the barriers created by certain mental models that hinder or prevent change. By combining the lived experiences of the community members, along with the depth of understanding of policies and practices brought by the district leaders, Digital Promise hoped to create a fruitful process for collaborating on solutions.

The first area of focus was to develop a theory of change around each PoP. In the Design Studio sessions, districts engaged community members to name barriers to systems change and brainstorm ways to reduce or eliminate them. Community members confirmed that the barriers identified by the district leaders were the same ones they experienced. In cases where they differed, the districts had an opportunity to modify or add to the list of barriers. Validating the work that the district teams put in to examine the systemic challenges at the core of their PoPs, in most districts the majority of the broader community group agreed that the teams identified the core barriers (though many encouraged the district teams to add context to their understanding of how barriers materialize in practice).

In parallel, the community members and district leaders devised solutions to address the barriers. This collaborative process allowed the groups to compare emerging ideas. Parents and students had had very direct experiences with the barriers and, as a result, their ideas were focused on day-to-day practices and the application of a set of principles. The exercises were invaluable, highlighting differences in perspective and revealing opportunities to address mental models that often prevent change at the building and classroom levels.

Design & Develop: Theory of Change

1. **Barriers**: The conditions brought about by mental models that impact the ability to design and implement systems change.
2. **Inputs**: The shifts in the mental models, relationships, and power dynamics that then break down the barriers.
3. **Actions**: The solutions that enable the shifts.
4. **Outputs**: The equitable conditions based on the shifts that allow for change.
5. **Outcomes**: The resulting change that leads to equitable results.

After the first set of Design Studio workshops, Digital Promise analyzed all the inputs from the process — the dossiers, systems conditions maps, barriers, and nascent ideas — and created a summative set of solutions as a culmination of transformational change concepts. The net effect of the first series of Design Studio workshops was the building of bridges from conditions to solutions. Moving forward, each district will select a specific solution concept for co-design with stakeholders, with the goal of launching and implementing it by the 2023-2024 school year (Figure 4). Including the voice of community members is a critical component of the Inclusive Innovation approach to solution design — infusing living experiences of students and parents necessary to develop durable solutions.

FIGURE 4: SYSTEMS TRANSFORMATION EMERGING SOLUTION CONCEPTS[17]

District Profile

The best endorsement of ESST is the stories of the eight districts that completed the Year 1 process. The district profile below details how one district recognized the systemic conditions tied to its PoP.

Creating systems change is rarely easy, especially in large districts where politics, mindsets, and resources often play significant roles. The district's profile illustrates the capacity building needed to recognize the system conditions that must be improved to make transformative progress toward resolving its PoP.

Defining a PoP

In the past 30 years, schools in this district have experienced a significant shift in student and family demographics. There has been a large increase in the number of Hispanic, Latino, and foreign-born residents. Many of the students in the district also face challenges often associated with poverty, including coming to school without having breakfast or enough sleep. They often experience family violence, abuse, gang affiliation, secondhand smoke, neglect, and inadequate clothing. These are significant challenges to students' progress toward college and career readiness.

District: PoP

The district began this phase by attempting to understand how to build equitable learning pathways across all student groups in the district.

Initial PoP: How can we build intentional Equitable Learning Pathways for all grade 6-12 students, including Black and brown students, ELLs, foster youth, special education students, and students at risk of experiencing homelessness?

Given its large proportion of Hispanic, Latino, and ELL students, the district delved deeper into how to support these populations by improving equity, graduation rates, and overall experiences for all students.

Based on their examination of the demographics and systemic challenges in the district, particularly for ELLs, the district team articulated the following PoP:

How can we intentionally increase high school graduation rates among ELLs?

DISTRICT STUDENTS

21,000 students

100% students of color

90% eligible for free and reduced-price meals

86% average high school graduation rate

24% ELLs

DISTRICT STAFF

34 schools

1,067 teachers

86% teachers of color

20:1 student-to-teacher ratio

DISTRICT COMMUNITY

160,279 residents

98% people of color

25% live at or below the poverty line

$54,613 median income

Understanding Systems Conditions

The district conducted a problem analysis to diagnose the systems-level conditions, specifically factors beyond pedagogical practice and outside of the classroom, that may be prohibiting ELLs from graduating from high school and completing their requirements at local schools. Through coaching sessions with FSG, the district identified implicit conditions that create systemic barriers and brainstormed shifts that would be required to address those conditions (Table 3).

By working through these steps, the district identified an implicit bias problem in its schools and shifted its focus from surface-level solutions to the underlying issue of training teachers in antiracism. Specifically, the district identified a need to change the way teachers perceive ELL students in the district, as well as the way students perceive their own capacity as learners.

In the spirit of Inclusive Innovation, the district next wants to work collaboratively with the students to address their learning needs. The district plans to implement structures to allow for greater student voice and choice in schools. A part of this will include a student survey to understand student educational preferences and other concerns. The district is also increasing its teacher training on cultural responsiveness and engaging faculty in a book study to develop strategies for teaching diverse student populations.

TABLE 3: DETAILED NOTES FROM FSG CONSULTATIONS

	Existing District Conditions	District Shift Required
Relationships & Connections	• High school teachers and staff do not clearly understand their roles in ensuring the success of ELLs. • High school principals in particular have conversations about strategies and data, but struggle with implementation and prioritization of interventions and strategies.	• The district must address staffing needs and train current staff with the needs of ELLs in mind. • The district must address the development of Career and Technical Education pathways and advance courses in a way that also meets the needs of ELLs and enables their success.
Power Dynamics	• Families of ELLs lack information and opportunities to influence decision-making. • Family outreach exists, but many families don't have the time, knowledge, and/or interest, culture competency, and sense of urgency regarding the importance of education to engage with schools. • ELLs have little influence over the decisions that guide schools and classrooms.	• The district must engage ELLs and their families in decisions that influence their experiences in school. This would also allow the district to identify and refine strategies and interventions.
Mental Models	• Many teachers may believe that students who demonstrate poor academic achievement are unable to improve. • ELLs may feel poorly about themselves when asked to attend supplemental education services.	• Revisiting grading practices and policies can help build accountability mechanisms among teachers to equitably assess students and provide them with feedback that is timely and actionable.

Summary of Lessons Learned

Digital Promise launched the ESST Initiative with the hypothesis that new policies, programs, and practices are not enough to build better, more equitable school systems; such interventions need to be developed and implemented with a systems transformation approach that engages communities and evolves the mindsets of those leading the change.

Year 1 of ESST provided a valuable opportunity to investigate whether approaching systemic transformation through an Inclusive Innovation research and development method holds the potential for generating the creative and effective solutions that are needed to address systemic inequity in school districts. Bellwether's study of districts' Year 1 experience points to several lessons for other educators seeking to adopt this approach.

Digital Promise's approach to providing high-quality individual coaching was critical to district satisfaction with the process. FSG, Williams, and Malloy brought deep content expertise and the ability to gain the trust of participating districts. The one-on-one coaching in particular provided an opportunity to tailor professional development to each district's context, creating, according to one district, a more authentic experience:

> ***"This [Inclusive Innovation] experience was different from others because it felt very authentic. You went through a process and really explored solutions. It was very intentional from the beginning of what we were trying to accomplish. This was the first time in my 20 years of experience that DEI, design thinking, and system transformation were presented in a connected manner. In the past, it's always been a canned experience."***

The concept of mental models was instrumental in helping districts understand the transformational aspect of systems change. Some districts approached mental models at a macro level, focusing on the capacity building required for stakeholders around equity and antiracism before the work could start. Others drilled down to the individual level and used the mental model framing to reflect on their own leadership styles.

> ***"Here at [district], we talk about these things and [they are] very consistent. Then in my own private life and how I grew up, and what I've been raised to believe, might be a little bit different. My family and personal contacts and their thought processes and mental models might be a little bit different. How do I address that cognitive dissonance and still be successful as a leader here?"***

This ESST participant further argued that:

> ***"[Our leaders are] sometimes unable to address that cognitive dissonance, and they need support. Really helping our leaders unpack where they are [is important], because they're the face and the communication, both up the chain as far as senior leadership goes, but also down [the chain] in terms of communication with staff and students and their parents."***

Digital Promise's Inclusive Innovation cohort helped districts establish a sense of connection despite the challenges of the pandemic. Districts reported a strong connection with their fellow cohort members.

> ***"That brainstorming, that brain dump, when you hear, 'Hey, we're thinking of this. We're toying around with this, toying around with that,' it really invites some creative conversation. Before this, we've been isolated with our team, we've been on one whiteboard. Whatever comes out, comes out. To sit with someone who's up in [state, while] we're down here in [state], trying to tackle similar problem practices. It just was a game-changing experience to sit with like-minded teams working on similar problems of practice."***

Incorporating community voices at the right time is critical for building an inclusive outcome. While the initiative may start with only district leaders and staff to build momentum and gain buy-in across the district, it is important that this group expand as they begin the process of developing solution ideas.

> ***"We're taking those things that the community has said. Again, we're going to take it and infuse it in this model of professional development, using the Inclusive Innovation model. Structurally, all of the schools have site councils. Now, do they use them effectively? Site councils have community members, parents; it's supposed to be a community-driven process, but we never taught people how to do that. That's where your model comes in."***

As districts consider engaging in this work, it is imperative that they invest in the appropriate technical support, dedicated people with an open mindset and the positional power to make changes at the systemic level, and a deep collaboration-centered level of community engagement. Systemic change starts with mindsets and relationships. It's not a quick fix but rather a process that takes the long view.

Questions for Future Research

Despite the many successes reported by ESST districts in laying a foundation for equitable systems transformation, this past year has also raised a number of questions that need to be addressed as the Initiative moves into Year 2.

Do districts have the capacity to do this without external support?
The ESST Initiative used considerable resources to support districts on their journey, including coaching, training, regular cohort meetings, and data analysis. During interviews, districts remarked on how helpful these resources have been in this process, enabling them to engage in conversations and test new ideas. They have also been encouraged by the cohort approach, keeping pace with their fellow participating districts. How will the work be sustained once Digital Promise, the technical partners, and the cohort structure are no longer supporting it?

How does one measure the success of the ESST Initiative?
Over the next several months, participating districts will need to think about how to measure the outcomes and impacts of their solutions once they are implemented. Specifically, how do they know when, for example, the mental models of the individuals involved in the process change? What does that change look like? Similarly, what might be the long-term impacts of the different interventions? Is it student achievement? Changes in students' social and emotional growth? These are all possible for many of the PoPs.

What are the implications of the current political context for the success of ESST and future initiatives?
In recent years, a wave of political movements led to a number of state and local laws that prevent much-needed work on equity. The Tennessee law that prevents discussions of critical race theory and the "Don't Say Gay" law in Florida are two examples that create an environment where even supporting the needs of marginalized students can risk one's job or a lawsuit. What strategies will the districts pursue to navigate these rough waters ahead?

Conclusion

Overall, the experiences of districts working through Year 1 of the ESST Initiative highlight that, for districts interested in creating transformative change to address systemic inequity, it is critical to:

- Include multiple voices from district leadership and the community to co-design solutions.
- Invest substantial time (ideally with expert coaching) to uncover implicit barriers and begin to shift mindsets.
- Be willing and open to work as part of a cohort of districts to share ideas and strategies.

Following these principles will take time, but participating districts acknowledge that the investment was worth it because they were able to develop deeper and more sustainable solutions to entrenched problems than they had in the past. Their experiences and lessons learned provide a valuable roadmap for other districts interested in developing durable, transformative solutions to increase equitable access to a high-quality education for all students. ✦

Appendix A. Bellwether Research Methodology

To understand the evolution of the ESST Initiative approach during Year 1, Digital Promise partnered with Bellwether to collect information on district support and progress, with special attention to understanding what strategies and supports are most useful in helping districts understand and build capacity for systems change. Throughout the year, Bellwether met monthly with Digital Promise to discuss ESST progress. To facilitate these meetings, Bellwether developed a standard interview protocol to ensure that data collection about implementation progress was consistent and comprehensive (Appendix C). The questions focused on project timeline, milestones, challenges, and updates.

In addition, Bellwether observed meetings organized by Digital Promise and its partners, including presentations, monthly cohort meetings, and coaching sessions for individual ESST participating districts. Bellwether also conducted an extensive review of program documents, including dossiers, workbooks, system maps, and summative interviews with each of the eight districts to gather their perspectives on and experiences of the process.

Appendix B. Student Use Case

Student Persona: *Who are the students furthest from opportunity?*

Directions: Develop a student persona that describes one or more students who are most impacted by inequitable and/or racist practices related to your PoP.

Student Identity *Who is the student you're describing? How does the student self-identify?*	The student we are describing is Andres. He is a long-term ELL. Andres is in grade 10, and he has not reclassified as a proficient English language speaker. He is failing four classes, exhibits signs of academic disengagement, and currently has a poor attendance record.
Internal Beliefs *What internal beliefs affect the student?*	Lack of academic self-efficacy, low self-esteem and motivation, no clear college or career goals. Andres feels that school is not for him. Nothing seems to catch his attention. He often thinks that he is not a smart learner. At times Andres feels left out. He feels that he does not belong in school. Andres has yet to find a strong connection with many of his teachers. He often feels misunderstood. He believes that not many teachers have tried to understand his own experiences. He struggles to see the classroom and school as a comfortable and safe environment.
External Circumstances *What external circumstances affect the student?*	Andres' father was deported and his mom is working two jobs and raising five kids in a two-bedroom apartment. The family lacks the social and cultural capital to support Andres. At an early age, there was a lack of academic guidance and support at home that could have helped Andres with his English language and learning needs. There was a lack of interventions for Andres in the earlier grades as well as acceleration programs that would have helped him stay on track. Some teachers and counselors at school have low academic expectations for Andres, which places him in remedial classes rather than giving him opportunities to take more rigorous and advanced classes. There are no systems in place to effectively develop a four-year academic plan for Andres that (a) tracks his progress toward graduation requirements and (b) effectively identifies and addresses barriers that impede his academic progress.

Continued on next page.

Dreams and Motivations *What does the student dream about? What motivates the student in school, work, and life?*	In elementary school, most students, if asked, say they want to go to college and be successful. However, for some, something happens along the way that begins to re-route and alter their dreams and motivations. Andres used to like school when he was a child. He loves animals and he always wanted to be a veterinarian. However, he is one of those students whose dreams and motivations seem to have faded over time.
Fears *What fears does the student carry regarding school, work, and life?*	Andres is fearful that he will fail, not appear smart, and be judged by his peers and teachers.
School-Based Frustrations *What challenges does the student experience? Identify up to three pain points.*	Andres feels that not many teachers take the time to know him, his struggles, and his aspirations. Andres is disengaged from school. Andres is failing most of his classes and is at risk of not graduating.

Appendix C. Interview Protocols

On a monthly basis, Bellwether met with the ESST Initiative program leaders. The purpose of the meeting was to identify emerging themes, questions, and insights, and to track progress overall on the initiative. Bellwether provided a summary of these findings in a mid-period report to Digital Promise in February 2022. The information gathered during this meeting against the questions outlined below informed Digital Promise on ongoing project management and provided highlights on key findings that could be used in the final Year 1 report.

Overall Progress

1. How well is the ESST Initiative proceeding?
    a. Milestones achieved?
    b. Any challenges/barriers?
    c. Any changes/mid-course corrections?

Progress on Developing PoPs

2. Systems-Level Change: Identifying the Problem
    a. How are districts identifying/refining their PoPs?
    b. How have districts changed or evolved since the beginning of the project?
    c. What do you think is leading to those changes?

3. Practice Level Change: Understanding Conditions Leading to Inequitable Outcomes
    a. How are districts going about understanding how their PoP is experienced by students/others in the community?
    b. What tools are being provided to help districts with this task?
    c. What are some successes or breakthrough moments you have witnessed, if any, as districts identify their PoPs and/or how it is experienced by students?
    d. What are some challenges you are seeing as districts work through this phase?

4. Thinking about the relationship between the [insert current phase] and all the other phases of the Inclusive Innovation approach, what were the key goals of this phase?

5. One of the primary goals of the Inclusive Innovation approach is for strong relationships to be built between districts and the community. In what ways were districts given support and opportunities to (1) connect with other cohort members and (2) foster this commitment within their district and communities?

6. To what degree did districts collaborate with community partners in the Inclusive Innovation process?

Continued on next page.

7. Which cross-cutting practices were key in this phase and how are they connected, if at all, to the support given and/or the ESST Initiative?
    a. Engagement
    b. Capacity building
    c. Reflection
    d. Recognition

8. What were some successes of the specific support districts received during this phase?
    a. Implementation of the Water of Systems Change approach
    b. Best practice demonstrations from the field
    c. One-on-one coaching
    d. Resources to support equitable learning environments (Elevate, Catalyze, and the BELE framework)
    e. Effectively engaging communities in equitable system design
    f. Monthly cohort meetings

9. How are school districts, community leaders, teachers, students, and others benefiting from this work?

10. Conversely, what did you see as the biggest challenges? Is there anything that you would have done differently? Why?

Appendix D. ESST Initiative Objectives and Key Partners in Year 1

TABLE A1: ESST INITIATIVE DISTRICT PROBLEMS OF PRACTICE

ESST Objective	Capacity-Building Method	Partner Organization and Support Description	
Build District Capacity in Systems Analysis	Coaching on the Water of Systems Change Model	FSG	Districts learned about FSG's Water of Systems Change model and about the conditions necessary to facilitate systems change. They also participated in coaching sessions to apply these lessons to their own districts.
Expand District Capacity to Build Equitable Systems by Understanding Conditions and Feedback Loops	Best Practice Demonstrations	Asia Society	Districts participated in "virtual study trips" that highlighted systems across the world (e.g., New Zealand, Scotland, Canada), effectively engaging communities in equitable system design.
	Resources to Support the Development and Evaluation of Equitable Learning Environments	PERTS	Districts learned how to collect and use data from PERTS, a system of short surveys developed by the Chicago Consortium that gathers feedback on a variety of classroom learning conditions related to inequitable learning environments. Survey questions ask students if the class affirms their identity, provides meaningful work, and honors student voices, among other things.
Build District Capacity for Cultural Competency	Analysis of Barriers and Development of Systems-Level Strategies	Dr. Williams	Teams participated in individualized coaching sessions during which they were pushed to consider how multiple factors (e.g., accountability systems, political context) may be holding their PoPs in place — and develop strategies to address those factors.
Build District Capacity for Systems Design and Implementation	Ideate and Create Prototype Solutions with Community in Design Studios	Digital Promise Inclusive Innovation Team	Teams collaborated with communities in design studios to begin ideating solutions to remove barriers and introduce innovative approaches to transform their school systems.

Endnotes

1 See, for example, Linda Darling-Hammond, "Inequality in Teaching and Schooling: How Opportunity Is Rationed to Students of Color in America," in The Right Thing to Do, The Smart Thing to Do: Enhancing Diversity in the Health Professions, eds. Brian D. Smedley et al. (Washington, D.C.: National Academy Press, 2001), 208–233. https://nap.nationalacademies.org/read/10186/chapter/9.

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14 It is important to note that there were amendments to the process of the ESST Initiative due to challenges brought on by the COVID-19 pandemic. Digital Promise originally sought to meet in person with the relevant participants from each district to work collaboratively as individual district teams and collectively as a cohort group. However, social distancing restrictions necessitated a shift to meeting on Zoom for most sessions.

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About Bellwether

Bellwether is a national nonprofit that exists to transform education to ensure systemically marginalized young people achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we work hand in hand with education leaders and organizations to accelerate their impact, inform and influence policy and program design, and share what we learn along the way. For more, visit **bellwether.org**.

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