

Advancing

# Racial & Socioeconomic

Diversity Playbook



A Guide for  
Administrators



Center for  
Education Equity

## About MAEC

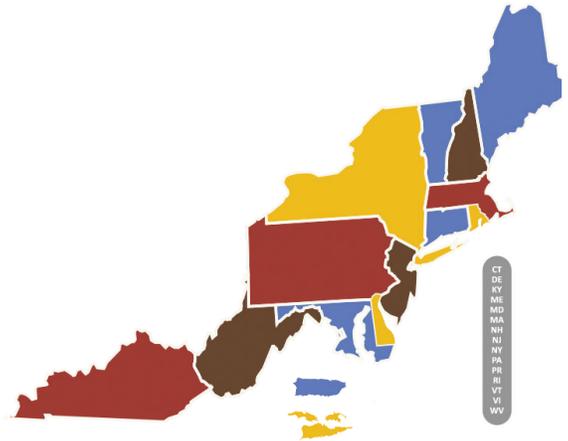
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MAEC is an education non-profit dedicated to increasing access to a high-quality education for racially, culturally, linguistically, and economically diverse learners. We work to promote excellence and equity in education to achieve social justice.

## About CEE

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MAEC established the Center for Education Equity (CEE) to address problems in public schools caused by segregation and inequities. As the Region I equity assistance center, CEE works to improve and sustain the systemic capacity of public education to increase outcomes for students regardless of race, gender, religion, and national origin. CEE is funded by the US Department of Education under Title IV of the Civil Rights Act of 1964.



## Authorship

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This guide was developed by the Center for Education Equity at MAEC through a partnership between MAEC and WestEd. Writers and developers of the materials were: Terrence J. Hofer, Ed.D., WestEd, and Susan Shaffer and Phoebe Schlanger, MAEC.

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## Disclaimer

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MAEC is committed to the sharing of information regarding issues of equity in education. The contents of this guide were developed under a grant from the US Department of Education under the Equity Assistance Centers program. However, the contents of this guide do not necessarily represent the policy or views of the Department of Education, and you should not assume endorsement by the Department of Education or federal government, generally.

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# Table of Contents

<b>Introduction</b>	<b>1</b>
<b>Part 1: Socioeconomic Integration Explained</b>	<b>3</b>
What do we mean by “socioeconomic integration?”	3
Why integration now?	3
<b>Part 2: The Plays</b>	<b>7</b>
Step 1: Prepare	9
Step 2: Plan	13
Step 3: Implement	22
Step 4: Reflect & Refine	26
<b>Part 3: Worksheets &amp; Tools</b>	<b>29</b>
Preparation Considerations	30
Planning Considerations	32
Implementation Considerations	33
Reflection & Refinement Considerations	34
MAEC Equity Audit	35
WestEd’s Lesson Tuning Protocol	69
General Equity Questions	70
Theory of Action	71
Planning How to Measure Actions Worksheet	72
Models of Integration	73
<b>Part 4: Final Thoughts</b>	<b>77</b>
<b>Part 5: References</b>	<b>79</b>





# Introduction

Public education is experiencing a dramatic increase in size and diversity. In a report from the Civil Rights Project (Orfield, et al., 2016), the public school population grew from 41.2 to 49.9 million from 1990 to 2013 with equally significant changes in demographics. White student participation fell from 69% to 50%. At the same time, Latinx student participation rose from 11% to 25%. Black students remained at 15%. And, Asian, Asian American, and Pacific Islander student populations grew from 3% to 5%. Most striking, the number of segregated non-White schools (those defined as having only 0-10% White students) tripled from 5.7% to 18.6%.

This increase in racial isolation for Black and Latinx students is coupled with economic isolation, the proportion of poor students defined by federal standards of subsidized or free lunch eligibility. The Civil Rights Project coined the term *double segregation* to refer to this pattern of racial and poverty isolation. In fact, the proportion of poor students in schools has significantly increased for all students regardless of race or ethnicity. Double segregation for Black and Latinx students is at an all-time high as these students attend racially and economically isolated schools.

## The Purpose

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The purpose of this Playbook is to provide those stakeholders interested in pursuing integration policies and practices with actions or “plays.” We also share thoughts on corresponding pitfalls to avoid. Generally, we designed the Playbook to support school communities that wish to launch or revisit a socioeconomic integration effort.



# INJUSTICE **ANYWHERE** IS A THREAT TO JUSTICE **EVERYWHERE**

- Dr. Martin Luther King, Jr.

## The Goals

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The goals of the Playbook are to:

1. Introduce racial and socioeconomic integration as an equity and evidence-based intervention
2. Advance the concept that integration includes the intersection of identity, ability, language, and socioeconomic status, rather than only a single issue problem
3. Identify integration models
4. Provide decision points for designing integration strategies
5. Provide tools to assess needs and to engage relevant stakeholders in an action planning process

We have divided the Playbook into sections:

- Part 1: Socioeconomic Integration Explained
- Part 2: The Plays
- Part 3: Worksheets and Tools
- Part 4: Final Thoughts

The Playbook frequently uses the word “we” to reflect MAEC’s theory of action to increase educational equity by co-creating environments with optimal conditions for teaching and learning that enable administrators, families, and community members to develop a common aim and work collaboratively.

PART 1:

# Socioeconomic Integration Explained

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# Socioeconomic Integration Explained

## What do we mean by “socioeconomic integration”?

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Socioeconomic integration aims to address the conditions of racial and poverty isolation as reflected by double segregation. “Socioeconomic (SES) school integration is a public policy designed to improve opportunities for students by 1) reducing the negative educational effects associated with school poverty concentrations, and 2) providing a diverse environment that benefits all students” (Kahlenberg, et al., 2017, p 2).

Educational equity means that every student has access to the resources and educational rigor they need at the right moment in their education, despite race, gender, ethnicity, language, religion, disability, family background, or family income (The Aspen Education & Society Program and the Council of Chief State Officers, 2017).

## Why integration now?

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Socioeconomic and racial integration leads to higher academic outcomes for all students, closes the achievement gap among students of different racial and economic backgrounds, fosters critical thinking skills, increases the ability to communicate and work with people of all backgrounds, reduces racial and ethnic prejudice while increasing cross-cultural trust and relationships, decreases the likelihood of teenage pregnancy and interaction with the juvenile justice system, and increases the likelihood of college going and success (Wells, et al., 2016; Mickelson, 2016). According to one recent estimate, reducing socioeconomic segregation in our schools by half would produce a return on investment of three to five times the cost of the programs (The Century Foundation, 2019). Only high-quality early childhood education has shown a higher return on investment than racial and socioeconomic integration (Kahlenberg, 2012).

With the trends and persistent data on segregation or the re-segregation of schools, the lens of desegregation as the counterpoint to isolation quickly emerges. University of California-Berkeley professor Rucker Johnson cautions that many in education use desegregation and integration interchangeably because of the civil rights movement and *Brown v. Board of Education*. This framing can limit the ultimate goal of what we are trying to achieve. He quotes Dr. Martin Luther King, Jr.: “Desegregation is enforceable...integration is not.” Desegregation is compliance and integration is “the map guiding the hearts and minds to a paradigm shift ... beyond legalistic compliance ... into the spirit of the democratic dream of integration and inclusion” (Johnson, 2014).

Verna Myers describes it another way, “Diversity is being asked to the party; inclusion is being asked to dance” (Myers, 2012). Professor Johnson posits that the Black-White dichotomy is an old paradigm that has guided education (and other areas like housing, employment, etc.) but no longer applies in today’s multi-ethnic, multi-cultural, globally competitive, 21st-century knowledge economy. All children will need the knowledge, skills, and most importantly, the mindset to flourish in this new paradigm. More than 65 years following *Brown v. Board of Education*, integration and inclusion of high-quality education and improved student outcomes must be at the center of all district and school plans to offset continued isolation. Desegregation is not enough.

This Playbook helps willing participants develop a deeper understanding of key areas of focus, contemplate readiness considerations, and explore pathways and pitfalls in the journey. Basterra and Kahlenberg (2017) state that to ensure equity for all children is at the center of a thoughtful, comprehensive plan, four overarching actions must guide the process:

1. Elevate and respect all cultures
2. Align policies and practices to the specific needs of students
3. Apply equity-minded leadership
4. Engage families of diverse backgrounds

The intent is to enable interested parties to find a path forward with the greatest likelihood for success. Operationalizing these actions for education and equity helps ensure all students are asked to the party and asked to dance.



PART 2:

# The Plays

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# The Plays

## Steps

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1. Prepare
2. Plan
3. Implement
4. Reflect and Refine

## Readiness for Change

“Across a variety of markets and disciplines, readiness for reform or organizational change is often said to be an important predictor of how successfully new policies, programs, or practices will be implemented. If people or groups are ready to embark on change, they are less likely to resist or actively sabotage its implementation. Moreover, when people are ready to undertake change, they will do so more energetically and thoughtfully than they might otherwise.”

(Howley, C., 2012, p.1).

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# Step 1: Prepare

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## Actions:

1. Form a Design Team
2. Engage in a powerful internal dialogue
3. Establish a compelling vision
4. Communicate early, broadly, and often with all stakeholders

## 1. Form a Design Team

One individual cannot design an integration plan. Diversity is essential. Here are some questions to consider when assembling a Design Team:

- Will team members have varying perspectives from which to pose and solve problems?
- How might we look at this problem from various interpretations—as a parent, teacher, principal, superintendent, resident, realtor, businessperson, etc.?
- What are possible pathways to achieve goals?
- How many team members are manageable and efficient?
- Which team members will play what roles (e.g., project manager, facilitator, etc.)?
- How will the team make decisions (e.g., by consensus)?



## Key considerations

The level of success of an integration campaign depends on the creation of a strong foundation. Given the strong opinions of individuals and advocacy groups on all sides of the agenda, the foundation must include a forum to raise the opinions, perspectives, and stories of how any changes in policy or practice may affect the parties involved. Efforts to ignore or minimize loud voices can be as harmful as failing to engage and give voice to historically silent participants.

Choose a leader who is skilled at managing teams. Establish and agree to norms of collaboration to proactively support the functioning of the team. Upholding the agreed-upon norms during the most challenging discussions will depend on the shared accountability and the commitment of all members.

## Pitfalls to avoid

**Lack of diversity:** If members have similar ideas, they can fall into groupthink which can perpetuate the status quo (Von Franc, V., 2013).

**Lack of trust:** When members don't trust each other and the process, the team cannot function effectively. Ideas or feedback may be squashed, ridiculed, dismissed, or ultimately withheld.

## 2. Engage in a powerful internal dialogue

Powerful conversations require attention to creating a safe and trusting environment. Dialogue around integration requires Design Teams to have the capacity to engage in courageous conversations. Glenn Singleton (2014) developed Four Agreements of courageous conversations and Six Conditions for such conversations based on his work with teams that want to talk about race and are committed to sustained dialogue focused around critical questions. Conversations about race can be uncomfortable, but agreements and conditions can help a Design Team work positively through emotionally difficult topics.

### Singleton's Four Agreements are:

1. Stay engaged
2. Experience discomfort
3. Speak your truth
4. Expect and accept non-closure



### Singleton's Six Conditions are:

1. Get personal right here and right now
2. Keep the spotlight on race
3. Engage multiple racial perspectives
4. Keep us all at the table
5. What do you mean by "race?"
6. Let's talk about whiteness



### Key considerations

Whether for internal or external dialogues, Design Teams benefit from adopting specific protocols of engagement and interaction that set the tone and guideposts for effective and fruitful conversations. *The Seven Norms of Collaboration* is a tool that can help support the Design Team through discussions. The Seven Norms Toolkit (Thinking Collaborative, 2017) is an online resource that has helped many teams become more effective by improving their communication and collaboration skills.

### Pitfall to avoid

**Lack of a strong opposing viewpoint:** During initial conversations, stakeholders will often be passionate individuals with a desire to create positive change. If the team lacks a strong opposing viewpoint, consider identifying a small number of individuals to act as a "Red Team." In addition to contributing to the dialogue and putting their ideas on the table, this group will be responsible for expressing opposing viewpoints and identifying potential blind spots that may be overlooked. [See Section 3 for guidance on establishing Red Teams.]

### 3. Establish a compelling vision

Having a shared vision or aspirational goal provides a lens to:

- Identify, review, and interpret data
- Grapple with possible solutions
- Guide the design of an implementation plan

Moving from a mindset of desegregation to integration requires envisioning a district with equitable opportunities for all. Learning communities are adaptable to the multiple perspectives of all stakeholders and can continuously improve because constituents share a common aspiration. This common aspiration is more than a vision statement mounted on a wall; it is a way to focus stakeholders towards a common goal. You can begin forming a compelling vision by:

- Collecting and sharing stories that demonstrate your beliefs
- Completing these sentence stems: “We are at our best when...” and “We are at our worst when...”

#### *Key considerations*

The process of designing an integration plan will likely be based on data, research, and experiences. Distilling all of this information into a plan that inspires and enlists others is essential. Once established, the vision becomes the tool for enlisting others in the journey.

#### *Pitfalls to avoid*

**An unclear vision:** If a vision lacks precision, Design Teams may expend a lot of effort without making steady progress. For example, a vision of “integrating schools” can be widely interpreted by those who read it. Any vision is likely to include reference to words like “integration,” “diversity,” “equity,” “special education,” “socioeconomic,” “racial,” and others. Each word, and the precise role within the vision, should be thoroughly discussed and understood by all team members.

**An un-compelling vision:** If the vision does not evoke images of an enriched classroom environment, it may fail to win the hearts and minds of parents and teachers.

We are at our  
**Best** when...

We are at our  
**Worst** when...





## 4. Communicate early, broadly, and often with all stakeholders

The Design Team needs to communicate regularly with those whose lives are directly touched. These include:

- District/school leaders
- Teachers
- Students
- Parents

Their level of buy-in will determine the resilience of the learning community to persevere against the threats against the vision. The Design Team also needs to communicate with the larger external community such as:

- Lay leaders
- Business leaders
- Community groups
- Religious groups

Schools live within the larger context of community and are often the public face of what is going on. Context and relationships with what is going on in the larger community will greatly inform and serve as a measure in attaining the desired goal.

### *Key considerations*

Building relationships and creating meaningful buy-in among stakeholders will be critical to later work. The degree to which the Design Team has built relationships internally and externally can signal an awareness and understanding of the congruence of multiple voices and proposed actions.

### *Pitfall to avoid*

**Hurried relationship-building:** Preparation is a critical phase in development. Often we are quick to move to action because preparation feels less glamorous and as if nothing is being accomplished.

## Step 2: Plan

### Actions:

1. Analyze segregation in your district
2. Form a Data Inquiry Cycle
3. Develop a Theory of Action that promotes integration
4. Develop an action plan to promote integration
5. Develop tools to measure progress of your integration model

There is no one play that works in every situation. Choosing an integration model should be part of a well-researched exploration of needs and options. Once selected, the communication plan should allow all stakeholders to assess and understand the new opportunity. Finally, the model must be supported with time, resources, and attention to fully realize the desired vision for students, parents, teachers, the school itself, and the school district.



### 1. Analyze segregation in your district

Other factors may be critical in the decision-making process across district/school structures, supports, and opportunities such as staff recruitment and training, pedagogy and curriculum, family involvement efforts, and extracurricular activities. Gathering and collecting baseline data is a starting point, and may be used to establish a desired future state where equitable access and opportunity to programs and schools is afforded to all students.

#### *Potential data to collect:*

- Existing policies
- Current practices
- Gaps between existing policies and current practices
- Academic programming: Who is in which courses and programs (tracking, special education, G&T, TESOL/Bilingual, vocational, etc.)
- Student achievement data
- Student discipline data (in and out-of-school suspensions, expulsions, detentions, etc.)
- School climate inventories or surveys across all stakeholders (administration, teachers, professional support, students, parents/guardians)
- Student participation data (curricular programs, sports, extracurricular programs, events activities, etc.)

## 2. Form a Data Inquiry Cycle

A Data Inquiry Cycle is a structured and supported process to methodically outline a flow so that critical questions are considered, investigated, and then addressed systematically. Engagement in an intentional, thoughtful data inquiry process can highlight more than what is evident on the surface. It asks questions to understand what is happening and what underlying assumptions or beliefs drive actions, decisions, and policies. It can point to additional data collection to answer those questions. Below is an outline of the process. A worksheet with supporting details for each step is available in the Center for Education Equity's *A Data Inquiry Guide for Exploring Equity Issues and Solutions* (2021).

### Equity Data Inquiry Cycle

1. Identify and investigate the problem regarding student experiences and/or outcomes.
2. Identify questions about the problem.
3. Identify multiple data sources to answer the questions and learn how school conditions may influence the problem.
4. Use the Data-Driven Dialogue process to generate the priority issues for the equity goals.
5. Explore resources, research, and evidence-based practices to inform the creation of SMART goals and write up to three SMART goals to address one of the root causes.
6. Create a plan and engage in a cycle of improvement as the plan is implemented.
7. Review progress on addressing the SMART goals and solving the original problem.
8. Celebrate success.
9. Restart the cycle.



## *Engage in an Equity Audit*

MAEC's Equity Audit: Criteria for an Equitable School is a tool to define equity gaps and identifies equity improvement targets in various components of a school. The audit looks at (1) school policy, (2) school organization/administration, (3) school climate/environment, (4) staff, (5) assessment/placement, (6) professional learning, and (7) standards and curriculum development. The tool provides investigative questions that can guide the team's exploration of a population's level of isolation, segregation, and needs. MAEC has also developed the Equity Audit: Criteria for an Equitable Classroom and the Equity Audit: Teacher Behaviors that Encourage Student Persistence. These tools are found in Part 3.

## *Conduct a Root-Cause Analysis*

Once data has been collected and analyzed, a root-cause analysis may be conducted by hypothesizing chains of causation responsible for the deviation from what was expected. Use the root-cause analysis (e.g., asking a succession of "why" questions) to identify an underlying cause in the chain that is in the district's locus of control, that the team can readily fix, and that will likely result in a distribution of students more aligned with the desired integration. See Part 3 for a sample root-cause analysis.

## *Key considerations*

While the distribution of students is a natural place to start, the Design Team must go deeper in its data collection efforts. Beyond reviewing student performance and discipline data, the Design Team needs to understand the "why" or "what" behind the data.

## *Pitfalls to avoid*

**Relying on one source of information:** Disaggregation of the data by various subgroups is necessary but not enough. The Design Team must collectively analyze, discuss, and interpret data across multiple sources. For example, consider school-climate student survey data in the context of discipline and performance data. Disciplinary incidents may be partially explained through data on student engagement. School-climate teacher survey data might provide insights into uneven disciplinary sanctions. Gleason and Gerzon (2013) provide a useful example of the types of important information that are hidden when not disaggregating data:

While a school's demographic data may indicate that 45% of the students are Black, they may be:

- Children of middle-class, college-educated African Americans;
- Newcomers from Haiti with some formal schooling;
- Fourth-generation African Americans whose ancestors never knew school success; or
- Children from Nigeria with no schooling who only speak a little-known dialect.

**Not soliciting feedback:** It is also important to create a safe environment for all voices to react to the data, not just those who agree with a selected plan. If all stakeholders are like-minded, consider adding new voices to the team and/or assigning a "Red Team" to continuously challenge assumptions and pursue other potential explanations for the presenting data.

### 3. Develop a Theory of Action that promotes integration

A Theory of Action approach provides a framework for obtaining a desired result. The approach includes comprehensive descriptions and illustrations of how and why the desired change is expected in a particular context. It is outcomes based and begins with the Design Team clearly defining long-term goals and then mapping backward to identify the necessary preconditions required for success. The process deciphers evidence from assumptions in deciding which action to take and how to assess actions. The Center for Public Research and Leadership's Evolutionary Learning process characterizes this as "If we do X, then Y will occur. As a result, we will achieve desired impact Z."

The first step for a Theory of Action to encompass socioeconomic integration from an equity perspective will be a mindset that adheres to and internalizes the four basic principles discussed at the outset (Basterra & Kahlenberg, 2017):

- An overall framework that is co-constructed, where all cultures are elevated and respected
- Policies and practices that are aligned with the specific needs of students
- Leadership that sets the tone and demonstrates a commitment
- On-going communication with families, community, and the public

There are various integration models, and each should be considered within the context of established goals for each school community. The models presented below don't represent the definitive array of possible integration models, and districts may want to adopt strategies across multiple models to reach their desired outcome. The school community must adopt and adapt an integration model that best aligns with the needs of their student populations and the set of isolation indicators present in the school or schools they are looking to change. The school community should be sure to adopt models, or pieces of multiple models, that address the root causes identified in their earlier analysis.



## Models of Integration\*

(Excerpted with permission from the NYSED Integration Resource Guide)

<p><b>Equitable or Controlled Choice</b></p>	<p>Districts offer an array of diverse schools for families to choose and the district assigns students based on those selections taking into account family preferences and the demographic makeup of students. Magnet or themed schools are frequently a component of an equitable-choice model.</p>
<p><b>District Consolidation</b></p>	<p>In consolidation, two or more districts come together to form a larger, regional district. This centralization of management increases efficiency and reduces the number of administrative units for higher-level managers. The ability to offer classes that are more specialized or the equitable distribution of teachers are examples of some of the advantages of consolidation.</p>
<p><b>Inter/Intra-District &amp; Two-Way Transfers</b></p>	<p>Inter-district and two-way transfers refer to two or more districts entering into an agreement to allow students to attend school outside of their home district. Intra-district agreements are within district transfers, allowing students to attend schools outside of their neighborhood. Such transfers might include magnet schools, charter schools, or other public schools.</p>
<p><b>Rezoning/ Re-Districting</b></p>	<p>Rezoning and redistricting is the practice of augmenting existing district school boundaries or student attendance zones in an effort to draw students from a wider geographic area in order to promote greater integration.</p>
<p><b>Strategic Placement of Specialized Schools &amp; Programs</b></p>	<p>Districts create specialized schools or programs to attract students and then strategically locate these schools or programs to promote the equitable distribution of students. These programs or schools might be theme based (STEM, arts, law, etc.) or they may offer programs not otherwise available in schools (universal pre-kindergarten, two-way bilingual or dual language programs, etc.).</p>
<p><b>Inclusive Special Education Program</b></p>	<p>Integrated co-teaching programs purposely integrate special education students, depending on their needs, in schools and classrooms with general education students. Classrooms are assigned a general-education and special education teacher that prepare and co-teach together. This model might be a component of a strategically placed specialized school or program.</p>
<p><b>Two-way Bilingual</b></p>	<p>Two-way bilingual programs or schools offer students with different home languages instruction in English and another language thereby providing multicultural and bilingual exposure to all students and fostering bilingual proficiency. This model might also be a component of a strategically placed specialized school or program.</p>
<p><b>Redistributing of Grades/ Princeton Plan/ Pairing Schools</b></p>	<p>A plan to maximize diversity within schools by making the entire district a single attendance zone and grouping smaller numbers of grade levels in each school. The approach organizes schools by grade span, not geographic location.</p>

\* See Section 3 for examples of schools that have engaged in each model

## Key considerations

Identifying a model with the mindset that sees beyond student placement will be important to establish a vision or common aspiration. A compelling vision should consider academic, programmatic, and structural elements that would affect the lived experience of students.

## Pitfalls to avoid

**Thinking a new model means achieving equity:** Equity is when students have a new opportunity reserved only for a smaller subset. School districts should consider choosing a model that creates equity for as many students as possible. The choice of model should clearly articulate how the selection of the model will achieve that goal. Districts should avoid investing time and resources into a model without an intentional plan for how the model will create greater equity over time. Spending time creating an equity-centered Theory of Action upfront will foster a greater understanding of the connection between the model selected and the anticipated equity-based outcomes.

**Vaguely defined outcomes:** Most social interventions have goals with many components. The Design Team should be ready to show participants how their thinking about reaching goals will be improved by unpacking large goals into smaller segments. Outcomes or desired results need to be unpacked into specifically defined components before creating a Theory of Action. Andrea A. Anderson (Aspen Institute Roundtable on Community Change) states vague outcomes can:

- Yield fuzzy thinking about what needs to be done to reach them
- Sabotage the ability to build a consensus about what is important in terms of programming, time, and allocating funds
- Make it difficult to figure out how to develop a measurement strategy to tell when and if they have been achieved

**Lack of thorough investigation:** Another pitfall to avoid is adopting a model without consulting with an expert or other districts that implemented a similar model. This Playbook provides general guidance for implementing integration plans. Still, school communities are encouraged to enlist outside support to fully understand the range of options and nuanced actions for the selected model.

## 4. Develop an action plan to promote integration

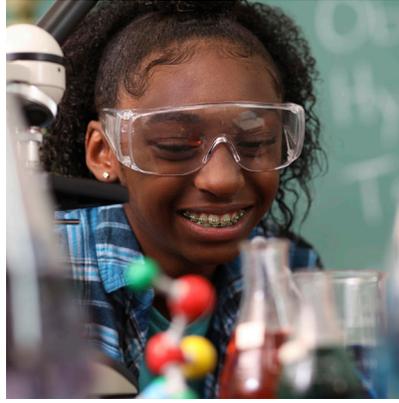
To create a strategic plan to implement a Theory of Action, the next step is to identify a series of inputs, actions, and outcomes that break down the Theory of Action into measurable steps that progress towards the desired impact. The table below has features that will help organize the Theory of Action and increase the likelihood that the desired outcomes will be attainable.



<p><b>Inputs</b> What we invest</p>	Internal	<p><b>Assumptions</b> Why these sets of inputs, actions, and outputs will lead to desired outcomes?</p>
	External	
<p><b>Actions</b> What we do, who will do it, and how will it be done</p>	Tasks	
	Process	
<p><b>Outputs</b> End products and action</p>		
<p><b>Outcomes</b> What happens as a result, e.g., changes in students, capacities, partnerships, policies, practices</p>	Intermediate	
	Long Term	



**Identify inputs:** Inputs are the resources, actors, and conditions that need to be in place to implement the strategy. Typically, inputs include money, staff, and equipment/infrastructure and are usually measured in dollars, people, time, etc.



**Delineate your actions:** Actions are the actual steps or activities needed to implement the strategy. Actions can include making calls, writing letters/memos/fact sheets, holding meetings/workshops, and examining/writing curricula, revising policy. Actions can typically be measured in terms of the number of things done.



**Align to desired outcomes:** Outcomes are the desired results, usually outlined in terms of long-term results (typically three to five years) and short-term results (the next year). Short-term results can be indicators of movement towards the long-term result. Shorter-term changes should lead to the desired impact – e.g., the “as a result” statement in your Theory of Action. These can be changes in attitudes, behaviors, results, and align with your “then” statements.

### *Key considerations*

Review the inputs and corresponding actions to ensure they are aligned. If aligned, review the outcomes to ensure that the inputs and actions are well designed to lead to the intended outcomes.

- Are the inputs comprehensive?
- Which actions do the existing inputs enable?
- Are there other inputs that need to be in place?
- Will the identified actions yield the outcomes that create the desired impact?
- Is anything missing or misaligned?

### *Pitfalls to avoid*

**Creating a plan that does not involve teachers working directly with students:** If there are no action steps for teachers to work with students, they may find supporting the plan and implementation difficult.

## 5. Develop tools to measure the progress of your integration model

Indicators are necessary to measure the extent to which the actions in the Theory of Action are carried out under the plan. Indicators allow all stakeholders to engage in a problem-solving process because they provide information on what is working well, early warning signs if things are not going well, and hints regarding fixing what is not working. Indicators should be quantitative (did you provide as many trainings as planned) and qualitative (did the training achieve the desired goals). Tools may include surveys, observation protocols, exit tickets at PD training, evaluation rubrics, data reporting records, etc. The Future Ready Integrated Schools Continuum (FRC), developed by Carole Learned-Miller, Kim Bridges, and Reggie Johnson (2016), offers a rubric for schools and districts. The FRC provides ten indicators to look at movement from segregation to desegregation and from desegregation to higher-quality models of integration:

- Enrollment
- Rigor
- Student assessment policy
- Professional development and pedagogy
- Curriculum
- Teacher diversity
- Behavioral support and discipline practice
- Closing opportunity gaps
- Family engagement
- Leadership

The rubric supports equity-based excellence by incorporating measures of what schools students attend and the broader equity mindset that ensures that all students are supported.

This table offers a simpler structure for checking if each corresponding action in a plan has a corresponding indicator and a tool to measure it.

Action	Indicator	Tool

### Key considerations

The indicators will ultimately become a measure for socializing progress on the plan. Therefore, the indicators selected should be relatively easy to communicate to stakeholders.

### Pitfalls to avoid

**Forgetting to keep communicating:** Stakeholders need to stay informed throughout the journey. The plan can unfold transparently. Soliciting ideas and input from stakeholders allows for a culture of trust that will be more likely to yield beneficial feedback on the process and more closely resembles the desired state.

## Step 3: Implement

### Actions

1. Identify Operations Team and clarify roles
2. Communicate Theory of Action clearly, broadly, and often
3. Create structures to review progress and identify problems
4. Take action on plan adjustments and changes to the Theory of Action



### 1. Identify Operations Team and clarify roles

The Design Team should assist with the creation of the Operations Team. This team will be responsible for communicating, implementing, and adjusting the plan. Generally, these responsibilities will occur at the school level, and the team will comprise school-level staff. The specific individuals will vary based on the context, but the Design Team should consider creating an Operations Team with representation from:

- School administration
- Teachers
- Special education
- ESL or bilingual program
- School support staff (e.g., counselor, social worker, etc.)
- Clerical staff (the individual who fields calls from potential new families)
- Parents (ideally a veteran parent and a parent new to the school)
- Community (realtors tend to be particularly interested)
- District Office (ideally from the Design Team)

#### *Key considerations*

To the extent practicable, communications to the group should recognize the diversity of its members and honor individual efforts and input. Otherwise, actions may be received as top-down and discourage buy-in.

#### *Pitfall to avoid*

**Details lost between Design Team and Operations Team:** The inclusion of a Design Team and an Operations Team is a recommendation. For smaller districts, this separation may not be necessary. However, when separate, there is a greater chance that some elements may get lost or altered in the communication from the Design Team to the Operations Team. Including at least one Design Team member on the Operations Team is one way to limit this potential issue. Another way is to create a system for the Operations Team to report strengths, weaknesses, opportunities, and threats (or SWOT) to the Design Team. The Design Team can share initial thinking on any threats to the plan, and the Operations Team can share related unintended consequences that have surfaced.

## 2. Communicate Theory of Action clearly, broadly, and often

Expanding and maintaining communication with the entire school community is an essential element of the overall implementation effort. The Theory of Action provides the rationale for the plan and should be the core of communications. However, as the plan itself is implemented, the school will undergo many changes. If the changes align with the overall integration effort, the Operations Team and the Design Team should communicate this.

### *Key considerations*

When forming your plan, ask yourself the following questions to ensure a positive school culture that includes family and community:

- How does the plan foster a safe and supportive environment?
- To what extent will effective school leadership shape the culture?
- How will culturally responsive pedagogy and practice be continuously nurtured?
- How will the school attract and retain high quality teachers?
- Which aspects of rigorous instruction will be visible in all classrooms in the school?
- Which extracurricular activities will be available to students?
- How will staff collaboration build trust and grow professional practices?
- How will trust be intentionally grown from student to student, student to teacher, teacher to teacher, teachers to administrator, parent to teacher, parent to administrator and student to administrator?

Messaging used in communication should continuously connect the equity tool back to the original vision of the plan. By not reconnecting, the vast number of priorities may present as disjointed and overwhelming to some stakeholders.

For specific individuals who resist the plan, crucial conversations (Patterson, et al., 2012) may provide a strategy to enlist their support. Even if the crucial conversation is unsuccessful in changing the other party's opinion, making an effort adds to the pool of shared meaning. It may also influence their future decisions or conversations with other parties.

### *Pitfalls to avoid*

**Shifting leadership or priorities:** Although there may be a great deal of energy at the launch of an initiative, senior leadership or champions may shift their time and attention to new priorities. As a result, the school community implementing the plan may not be aware of the value that senior leadership continues to place on this priority versus newly emerging priorities. Creating a well-defined communications plan that continuously projects the progress and priorities of the integration plan will ensure that it is not forgotten. Sharing the plan enables a form of reciprocal accountability where all parties hold each other accountable for success.

# Build in a process of **reflection** and **self-assessment** along the way



## 3. Create structures to review progress and identify problems

The Operations Team should schedule regular times to review the plans' progress and collect input on adjustments. A standing agenda may include time allocated for the team to review applicable data and discuss progress and challenges for each component. This process's effectiveness depends on the accurate and timely collection of relevant data in advance of each meeting. If accurate, complete, and timely, the data should enable all stakeholders to determine whether critical milestones are achieved and if elements of the plan are working as intended. With this information, the team will be best prepared to determine the next steps.

### *Key considerations*

Integration is much more than putting students with different backgrounds into the same school. The success of the plan is contingent on the consistent commitment to equity and socioeconomic integration. The more critically the Operations Team can diagnose the current state, the more likely the team will prescribe the next steps to move closer to the desired future state. For example, as the initiative matures, the focus often moves from student representation to a distinctly different outcome that values how newly integrated students engage with one another and other adults in the community.

### *Pitfall to avoid*

**Not addressing unintended consequences:** By building a process of reflection and self-assessment along the way, the Operations Team can troubleshoot and address unintended consequences swiftly.

## 4. Take action on plan adjustments and changes to the Theory of Action

The Operations Team may include administrators, teachers, and parents from a school community that has recently implemented integration. Working with students daily, team members will directly experience all of the hiccups in the plan and need to make adjustments along the way. The Operations Team should ensure that the hiccups do not become the new narrative. For each challenge they experience in the field, the Design Team should be prepared to provide support and ideas to overcome the challenges.

### *Key considerations*

Understanding context, assessing assumptions, and authentically exploring expectations throughout the process is essential. Going back to the Seven Norms of Collaboration, Four Agreements, and Six Conditions will allow everyone to practice the muscle of a more open mindset continually.

### *Pitfalls to avoid*

**“I told you so”:** It is inevitable that some variation of “I told you so” may surface once implementation has begun and students are learning side by side in an integrated environment. This might happen, for example, if a teacher recommends a new student from a low-socioeconomic family for special education services before fully pursuing pre-referral interventions. It may happen when a middle-class family chooses to leave a public school for a private school option. It may happen if a new student of color acts aggressively toward another student. Understanding context, assessing assumptions, and authentically exploring expectations throughout the process is essential.

**Relying on one-directional communication:** The use of social media, automated phone calls, and other regular outreach options tend to be one directional. The plan should include efforts to track participation from eligible families and consider options to target outreach to families that have not accessed new opportunities.

One of the most important drivers of the plan’s success will be the extent to which parents choose to participate in exercising new options for choice (Office of Innovation and Improvement, 2004). If parents are not fully participating, the Design Team may provide resources to support outreach activities, such as:

- Articles and ads in local newspapers
- Ads on billboards and buses
- Public service announcements on radio and TV
- A brochure that profiles the district’s schools
- Individual school newsletters or brochures
- A pamphlet that describes enrollment options
- Movie theater advertisements
- Refrigerator magnets
- Community or town hall meetings
- School open houses
- Booths at local malls
- An exposition sponsored by local businesses
- A choice fair
- Participation in ethnic fairs

The Design Team should explore social media solutions and consult with parents in each community to learn which tech-based platforms they use most.

## Step 4: Reflect & Refine

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### Actions

1. Identify areas of implementation to address
2. Revise Theory of Action and action plan
3. Develop new indicators and tools
4. Implement revised approach

### 1. Identify areas of implementation to address

The completion of the first year provides an ideal time for reflection and refinements. Presumably, some form of reflection has occurred during monthly meetings. The end-of-year reflection should focus on a review of data points in relation to key milestones. Ideally, a meeting between the Design and Operations Teams would allow planners and the implementers to reflect together.



In most instances, the move to integrate schools is not universally supported. Typically, the leader needs to sell the plan to a board, supervisor, or an entire school community. Absent an independent third-party evaluator, there may be a tendency to seek out and draw upon the most favorable data to present an overall favorable perspective of the implementation. A third-party evaluator enables the leadership to concentrate time and energy reflecting on what the evaluation report identified as working well and contemplating adjustments for those areas of improvement that require refinements prior to beginning the next year. Additionally, in an environment where some may be looking to assign blame, a third-party report can help remove the focus from a person and onto a document.

### Key considerations

Collect and analyze data around recruitment and retention:

- **Recruitment:** Parent choices and school enrollments, parent satisfaction with the choice process, and reasons for choices
- **Retention:** Parent satisfaction with the school culture and academics after attending

Quantitative data about parent choices can reveal if a school is overenrolled or underenrolled based on the number of seats available. This data becomes increasingly useful over time as new efforts to fill seats, particularly with a socioeconomic mix of students, are employed.

### Pitfalls to avoid

**Focusing only on recruitment:** Once enrolled in a school, the goal should be to keep students enrolled. If parents do not feel the selected school provides a solid academic program or keeps promises made during enrollment, they may choose to leave. Creating integrated schools is achieved through both enrollment and retention. Focusing exclusively on enrollment without retention would limit the ability of the school to meet the selected goals

## 2. Revise Theory of Action and action plan

Revisiting the action plan offers an opportunity to review data and make adjustments in areas such as creating a safe and supportive environment, building effective leadership, expanding the use of culturally responsive pedagogy and practice, supporting rigorous instruction and staff collaboration, and expanding extracurricular options for students. See Section 3 for a worksheet on general equity questions that may stimulate further dialogue to inform additional equity-centered adjustments.

### *Key considerations*

Data, both favorable and unfavorable, must be communicated so teams can adjust the course and demonstrate continued commitment to the vision.

### *Pitfalls to avoid*

**Not having an answer for falling test scores:** Despite the best efforts, school test scores will go down in some cases. Individuals who were against the integration plan may quickly attribute the decrease in test scores to the integration plan and the addition of “those students” to the building. In such cases, it is important for leaders to (1) steadfastly assert the goals of the plan and progress toward the goals, (2) emphasize the school improvement efforts that are underway, and (3) invite the critics to get involved.

## 3. Develop new indicators and tools

The indicators selected in the original Theory of Action were used to track progress against the established goals. If the indicators were useful, their use should be continued into year two and beyond. If not, this is an ideal time to consider alternate indicators and tools to improve communication. Revisiting the FRC (Future Ready Integrated Schools Continuum) might be helpful in this stage to reflect and measure progress on the continuum. Courageous internal and external conversations on each of the ten indicators would provide helpful data to ascertain the next steps.

### *Key considerations*

If the Design Team did not do this earlier, they might want to engage in an Equitable School Audit or an Equitable Classroom Audit. Both are tools MAEC developed and can be found in Section 3. The Equity Audit on Criteria for an Equitable School helps school leaders assess whether or not the school provides the processes and information which create a positive learning environment so students and staff can perform at their highest level. The Equity Audit on Criteria for an Equitable Classroom helps school leaders assess whether or not a classroom provides students with the processes and information that create a positive learning environment where students can perform at their highest level.

These tools may be used as is or modified to provide data closely aligned to the school’s unique action plan and priorities. The audit may be used as a means of providing feedback on the process. In addition to identifying or creating tools to track progress, the action plan should clearly articulate the tools’ purpose, how and when the tools will be used, and how and when the data will be shared, reviewed, and analyzed.

### *Pitfalls to avoid:*

The reflection period is intended to assess whether operations need adjustment and ensure that the data is administered. In the case of a school using the equity audits, the reflection period may consider who is doing the review and who is leading the effort to analyze the data. In each case, the goal is to continuously review and refine the approach to attain the stated goals of the integration plan.

## 4. Implement a revised approach

There is a lot of activity usually at the beginning of many initiatives, particularly those funded with an initial infusion of resources. Future years may bring additional resources and different initiatives. Like so many other initiatives, the challenge with integration efforts is to maintain focus amid other changes.

### *Key considerations*

As the school community creates a unique environment, growing a staff that profoundly connects to that culture is important. Attending to commitment drivers that affect workplace performance offers a path to achieve this goal. Consider each of the following commitment drivers in the context of building and maintaining a staff that remains fiercely connected to the implementation plan (Stum, 1998):

- The extent to which the organization encourages personnel to challenge the way things are being done; being able to speak up about the status quo without fear of retribution.
- The extent to which the organization works to improve employee job satisfaction, providing opportunities for employees to soar with their strengths and giving less attention to overcoming weaknesses.
- The extent to which the organization provides the employee with opportunities for personal growth and development.
- The extent to which organizational direction is evident.
- The extent to which the organization recognizes work-life balance needs.

### *Pitfalls to avoid*

**“Rolling over”:** When transitioning from one year to the next, there can be a tendency to “roll over” existing processes. This default option is sometimes used when there are many pressing priorities that need to be considered from one year to the next. Use long-term goals and commitment drivers to encourage a mindset that endures over time.

PART 3:

# Worksheets & Tools

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## Step One: Preparation Considerations

### Current State

When considering race, ethnicity, socioeconomic status, ability levels, language abilities, gender, religion, and orientation

### Desired Future State

### Forming a Design Team

Who are the individuals best positioned to support integration and equity? Do they:

- Represent a key stakeholder group?
- Have a wide circle of influence?
- Understand the dynamics of the school and community?
- Understand and remain open to how culture influences learning?
- Have an equity mindset?

What team members will play what roles (e.g., project manager, facilitator, etc.)?

How will the team make decisions?

### Engaging in Powerful Internal Dialogue

- What is the compelling case for integration now?
- What are the top five challenges?
- What are the top five benefits/assets to support change?

Refer to Glenn Singleton's Four Agreements and Six Conditions of courageous conversations.

## Step One: Preparation Considerations cont.

### Current State

When considering race, ethnicity, socioeconomic status, ability levels, language abilities, gender, religion and orientation

### Desired Future State

### Establishing a Compelling Vision

- What are the perspectives of internal stakeholders?
- What are the perspectives of external stakeholders?
- How will all perspectives be represented in the vision?

What team members will play what roles (e.g., project manager, facilitator, etc.)?  
How will the team make decisions?

### Communicating Broadly, Early, and Often with All Stakeholders

- What communication norms and supports are in place to address pushback?
- What areas of communication need to be reinforced or solidified during difficult times?
- Are we reaching district/school leaders, teachers, students and parents, and the larger community?

## Step Two: Planning Considerations

<b>Current State</b>	<b>Desired Future State</b>
When considering race, ethnicity, socioeconomic status, ability levels, language abilities, gender, religion, and orientation.	What structures, supports, and opportunities will be different for various populations?
<b>Analyzing Segregation in Your District</b> Which areas of segregation and isolation in the district, if corrected, would have the greatest impact on students?	
<b>Developing a Theory of Action that Promotes Integration</b> <ul style="list-style-type: none"> <li>• What Theory of Action has the greatest potential to promote integration?</li> <li>• How does the model of integration proposed meet the unique circumstances in your district/school?</li> <li>• How does the selected model address the unique needs of students?</li> <li>• Does your mindset adhere to the four basic principles of co-construction, aligning policies and practices with specific student needs, leadership that demonstrates commitment, and communicating regularly with families, community, and public?</li> </ul>	
<b>Developing an Action Plan to Promote Integration</b> <ul style="list-style-type: none"> <li>• What resources (e.g. funds, time, staff, etc.) are needed to successfully implement the action plan?</li> <li>• What are the inputs, actions, outputs, and outcomes?</li> </ul>	
<b>Developing Tools to Measure Progress of Your Integration Model</b> <ul style="list-style-type: none"> <li>• How will you know if the Theory of Action is making a difference?</li> <li>• What indicators will provide feedback on benchmark goals?</li> <li>• What are the early warning signs that things are not going well?</li> </ul>	

## Step Three: Implementation Considerations

<b>Current State</b> When considering race, ethnicity, socioeconomic status, ability levels, language abilities, gender, religion, and orientation	<b>Desired Future State</b> What structures, supports, and opportunities will be different for various populations?
<b>Analyzing Segregation in Your District</b> Who are the individuals best prepared to address the areas of need? <ul style="list-style-type: none"> <li>• Academic performance</li> <li>• Curriculum representation</li> <li>• Discipline</li> <li>• Academic programming (special education, G&amp;T, advance placement, etc.)</li> <li>• Extracurricular programs, events, or activities</li> <li>• Parent engagement</li> <li>• District/school culture and climate</li> </ul>	
<b>Communicating Your Theory of Action Broadly and Often</b> Are communication mechanisms in place for open and transparent communication... <ul style="list-style-type: none"> <li>• Between district and school?</li> <li>• Within the school?</li> <li>• Between school and families?</li> <li>• Between school and the community?</li> <li>• Are there communication mechanisms for feedback from families and the community to enter ongoing discussions?</li> </ul>	
<b>Creating Structures to Review Progress and Identify Problems</b> <ul style="list-style-type: none"> <li>• How and when will stakeholders be invited to contribute ideas to the process?</li> <li>• How will mid-course corrections be contemplated?</li> </ul>	
<b>Taking Action on Plan Adjustments and Changes to the Theory of Action</b> <ul style="list-style-type: none"> <li>• Who is responsible for making mid-course corrections?</li> <li>• What degree of operational changes will require a change to the Theory of Action and action plan?</li> <li>• How will these changes be reported to the Design Team?</li> </ul>	

## Step Four: Reflection & Refinement Considerations

<b>Current State</b> When considering race, ethnicity, socioeconomic status, ability levels, language abilities, gender, religion, and orientation	<b>Desired Future State</b> What structures, supports, and opportunities will be different for various populations?
<b>Identify Areas of Implementation to Address</b> Who are the individuals best prepared to address these areas of need: <ul style="list-style-type: none"> <li>• What areas of implementation need to be addressed?</li> <li>• What strands of the action plan worked?</li> <li>• Why, and for whom, did they work or not work, and under what conditions?</li> </ul>	
<b>Revise Theory of Action &amp; Action Plan</b> <ul style="list-style-type: none"> <li>• What changes to the Theory of Action and action plan need changing?</li> <li>• What additional information is needed?</li> <li>• What other root-cause drivers can be added to the action plan for continuous improvement?</li> </ul>	
<b>Develop New Indicators and Tools</b> <ul style="list-style-type: none"> <li>• Are the established indicators and tools providing the data needed to make meaningful adjustments?</li> <li>• What new indicators and tools can provide a stronger assessment of progress toward desired goals?</li> </ul>	
<b>Implement Revised Approach</b> <ul style="list-style-type: none"> <li>• Have you implemented a revised approach that incorporates adjustments informed by data?</li> <li>• Have you considered the inclusion of long-term goals?</li> <li>• Have you considered the inclusion of commitment drivers?</li> </ul>	

# Equity Audit



## What is an equity audit?

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An equity audit is a study of the fairness of an institution's policies, programs, and practices. Such audits represent a significant investment in resources, both human and material. Thus, it is worthwhile to anticipate potential challenges and develop a plan for addressing them. The goal is that the process will move as smoothly as possible, and the results will help inform the next steps. The tool presented here is designed to facilitate equity audits in educational settings. This tool helps to critically examine policies, programs, and practices that directly or indirectly impact students or staff relative to their race, ethnicity, gender, national origin (English Learners), language, disability, age, sexual orientation, sexual identity, religion, or other socioculturally significant factors. A regular organizational audit may have an equity component, but that is not its specific purpose.

## What is MAEC's Equity Audit Tool?

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MAEC, Inc. developed the three Equity Audit tools found in this document to offer districts, schools, and teachers a way to begin conducting an equity audit. These tools were designed to:

1. Help educators develop a more concrete understanding of what it means to practice equity, and
2. Reflect on whether current school policies, procedures and practices are equitable.

This tool can be used for individual or small group reflection, or it can be used as part of a large-scale process for advancing equity.

MAEC's Equity Audit consists of three questionnaires for school leaders, educators, and staff to assess if their schools and classrooms are equitable across various criteria. The three questionnaires are: *Criteria for an Equitable School* (composed of 101 questions), *Criteria for an Equitable Classroom* (composed of 36 questions), and *Teacher Behaviors that Encourage Student Persistence* (composed of 59 questions). These tools examine practices, policies, and procedures at each level to determine if the school community is creating a positive, equitable learning environment that allows students and staff to perform at their highest levels. The questionnaires are meant to provide a birds-eye view of various aspects of equity and highlight many systemic barriers to equity that might exist. The MAEC team developed the questionnaires relying on extensive experience in the field of educational equity and a review of relevant literature.

### What is an Equity Audit? An Analogy.

**Service:** providing shoes.

**Equality:** everyone gets a pair of shoes.

**Equity:** everyone gets shoes that fit.

**Equity Audit:** determining  
(1) who "everyone" is,  
(2) what constitutes "shoes," and  
(3) creating decision-making processes for how "fit" is identified and evaluated.

## What is different about the 2021 version?

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MAEC significantly revised the tool based on feedback from practitioners and researchers. The updated audit accounts for the new realities many schools face with virtual learning. This tool can be used as a reflection tool in a comprehensive equity audit process. For more guidance on conducting an equity audit, please refer to MAEC's *An Equity Audit: Is It In Your Future*. MAEC also revised the scale for rating each item from a two-point scale to a four-point scale to account for the different stages at which institutions may find themselves on their equity journey. Expanding the scale allows for a more thorough look at where each entity is in regards to equitable policies, practices, and procedures.

## How to implement MAEC's Equity Audit tool

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The district/school will develop a process for answering the questions on the Equity Audit tool. One person should not complete this process: it should involve all key stakeholders and include diverse voices. Representatives from the following groups should be included: administrators, faculty, staff, students, parents, and community members. One valuable way to fill out the document is by establishing an equity committee and discussing each question so that the committee reaches a consensus on how to rate the question. Another is to conduct the audit as a survey among key stakeholders and to use the average score per question.

An important reminder is that the Equity Audit is a tool that provides a starting point in evaluating your institution's current state concerning equity. It provides a snapshot of your district/school's state at one point in time. By no means is it exhaustive and does not include all potential systemic barriers to equity or focuses on all groups that might not be receiving required supports. Once you receive the initial data from this tool, it might be necessary to investigate your system further to better understand different constituents' individual experiences with additional data collections.

For guidance on next steps after completing an equity audit, please [contact MAEC at www.maec.org](http://www.maec.org).

# Table of Contents

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- Criteria for an Equitable School** **4**
- School Policy 5
- Assessing Community Needs 7
- School Organization/Administration 9
- School Climate/Environment 12
- Staff 14
- Assessment/Placement 16
- Professional Learning 17
- Standards and Curriculum Development 19
  
- Criteria for an Equitable Classroom** **21**
- Academic Placement/Tracking and Grouping 22
- Student Leadership and Recognition 23
- Classroom Environment 24
- Instructional Strategies 26
  
- Teacher Behaviors** **28**
- Instructional Strategies 29
- Curriculum Strategies 32
- Classroom Management Techniques 33
- Interpersonal Practice 34
- Teacher Behaviors That Encourage Student Persistence 35

# Criteria for an Equitable School

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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 resources according to need and appropriate instructional strategies for each student. The equitable school:

1. Has a clear mission that is committed to equitable access, processes, treatment, and outcomes for all students, regardless of race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity, gender expression, sexual orientation, religion, or disability status.
2. Provides an inclusive visual environment both digitally (online portals, materials, etc.) and in person (halls, displays, classroom exhibit pictures, etc.). This effort considers the physical environment from which teachers broadcast to make sure it is appropriate and encouraging for all students.
3. Reflects and works in collaboration with the various racial, ethnic, socioeconomic, language, sex, gender identity, gender expression, sexual orientation, and disability groups within the school community.
4. Works in partnership with families, the business community, and civic and community organizations to enrich the curriculum, provide consistently high expectations for all students, and develop support and opportunities for all students.
5. Provides ongoing, embedded, and systematic professional learning (i.e., training, coaching, communities of practice) opportunities to support staff in implementing equitable learning for all students (whether in-person, hybrid, or distance learning).
6. Promotes social-emotional well-being for students and families to develop a supportive and inclusive learning community that promotes the cultural assets that they bring to their classrooms.

Below is an explanation of the scale used to rate each item.

1. **Latent (0 Points)** - This rating corresponds to the district/school currently not doing anything, or having no system in place as it relates to the question.
2. **Emergent (1 Point)** - This rating corresponds to the district/school having some systems in place, but the systems are not explicit or strong. The district might still be working towards establishing policies and norms related to the topic of the question.
3. **Established (2 Points)** - This rating corresponds to a district/school having established explicit systems in place. In many cases, to be rated as established, the district/school has to have created documentation regarding the question's topic.
4. **Advanced (3 Points)** - This rating corresponds to a district going above simply establishing explicit systems. This rating is reserved for items where a policy, process or norm is centered on equity. A district/school scoring "advanced" is focused on creating an environment that acknowledges and addresses equity complexities.

## School Policy

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Does the school/school system have a specific educational equity policy in areas related to race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity, gender expression, sexual orientation, religion, and disability status?				
2. Does the educational equity policy clearly explain the procedures for reporting complaints, investigating complaints, and appeals?				
3. Is the educational equity policy monitored for consistent and complete implementation as well as amended if necessary?				
4. Does the educational equity policy regarding racial equity address the harmful impacts of racial stress and trauma?				
5. Does the educational equity policy identify the roles of teachers, staff, and administrators' in mitigating race-based disparities?				
6. Does the school have a clear mission statement regarding educational equity?				
7. Are updates to policies and procedures publicized to staff, students, and families in an accessible manner and on a timely and continuous basis?				
8. Has the school developed an equity plan of action based on the policy, mission statement, and analysis of its current equity needs?				
9. Did all relevant stakeholder groups (staff, families, students, and community members) participate in the development of the mission statement and equity plan?				

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
10. Does the school have a policy regarding accommodations for students with disabilities and English Learners?				
11. Are there policies and procedures to assure that no student is denied participation in extracurricular or co-curricular activities (as health and safety guidelines permit) because of race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity, gender expression, sexual orientation, religion, disability status, or transportation limitations?				
12. Does the school have a clear and equitable attendance policy that takes into consideration, and does not penalize students, for barriers (e.g., technological issues, families' schedules, etc.) they might face during virtual learning?				
13. Does the school have a policy regarding using names students identify as their preferred name and personal pronouns?				
14. Does the school have a policy regarding bathroom and locker room use by transgender students?				

## Assessing Community Needs

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Does the school/school system have a plan for family engagement that encourages and provides avenues for the involvement of all school staff and all families, and sustains community partnerships?				
2. Does the school have clear processes and structures for school staff to meet student needs by providing additional targeted or intensive supports as necessary?				
3. Does the school encourage the engagement of all families and community members in school planning, support, and governance (e.g., through forming a school advisory committee, conducting a survey, organizing focus groups, etc.), whether in-person, hybrid, or distance learning?				
4. Are families and community members involved in school planning, support, and governance representative of the school community by race, ethnicity, socioeconomic status, national origin, language, sex, gender identity, gender expression, sexual orientation, religion, and disability status?				
5. Does the school use multiple methods of communication, including translation, to engage with families regarding their priorities, feedback, and concerns regarding distance learning?				
6. Does the school ensure that families have access to information, virtually and in person, in a language they can understand?				
7. Are current needs of the school community frequently assessed (e.g., food, transportation, housing, physical health, social-emotional well-being, etc.)?				
8. Has the school surveyed families' technological needs?				

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
9. Has the school enacted an actionable and timely plan to ensure that all families have access to technology and stable internet, and know how to navigate technology and key software the school may be using?				
10. Does the school monitor attendance to help identify potential barriers students might experience in accessing their education (whether in-person, hybrid, or distance learning)?				
11. Does the school reach out to families of students to address potential barriers that students may experience in accessing their educational learning (whether in-person, hybrid, or distance learning)?				

## School Organization/Administration

Criteria/Questions		Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1.	Do school administrators have the knowledge and skills to be able to identify equity issues?				
2.	Are school administrators trained to provide leadership in developing creative strategies to achieve excellence and equity among all staff and students?				
3.	Are there personnel or an advisory committee that coordinates school improvement and assures equity compliance in all phases of school management?				
4.	Have interpreters and translators been identified for the varied languages present in the school community to facilitate two-way communication between families and school staff?				
5.	Is enrollment monitored in special education, vocational education, gifted education, and advanced courses for the disproportionate representation of language, gender, racial, or ethnic groups?				
6.	Is enrollment, including special education, vocational education, gifted education programs, and advanced courses, composed of students who proportionately reflect the diversity within the overall student population?				
7.	Is guidance and counseling provided to encourage all students to take higher-level courses, particularly in the critical filter areas of Honors, STEM, AP, and IB courses?				

Criteria/Questions		Latent (0)	Emergent (1)	Established (2)	Advanced (3)
8.	Is data regularly collected, disaggregated, and analyzed in the following areas and by different racial, ethnic, and language groups? (Indicate "latent," "emergent," "established," or "advanced" for all that apply)				
8a.	Course level enrollment				
8b.	Grade point average/achievement scores				
8c.	Standardized test scores				
8d.	Student discipline, suspensions, and expulsions				
8e.	Bullying or harassment				
8f.	Participation in school activities and honors				
8g.	Attendance				
9.	Have the following been modified as needed as a result of the data from question 8 combined with anecdotal and other information?				
9a.	Policies				
9b.	Programs				
9c.	Curriculum Strategies				
9d.	Instructional Strategies				
10.	Does the school prioritize hiring psychologists, counselors, social workers, and nurses to support the social-emotional well-being of students and staff?				
11.	Does the school utilize restorative approaches to support the social-emotional well-being of students and staff?				

Criteria/Questions		Latent (0)	Emergent (1)	Established (2)	Advanced (3)
12.	Are consequences for violating school procedures taught and reinforced to students using evidence-based strategies (e.g., restorative practices, culturally responsive PBIS, etc.)?				
13.	Does the district provide a user-friendly, accessible location (e.g., an online learning portal) for students and families to retrieve virtual learning materials?				
14.	Does the school provide access to learning materials (e.g., textbooks, reading materials, etc.) in order for students to complete learning assignments?				

## School Climate/Environment

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Does the visual environment, including online school portals, virtual and in-person classrooms, bulletin boards, displays, hall decorations, and offices, show diverse students of varied racial, ethnic, language, gender, gender identity groups, and people with disabilities in a variety of roles?				
2. Does the interaction of school staff with each other, students, families, and community members convey a respect for people regardless of race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity, gender expression, sexual orientation, disability status, age, or religion?				
3. Are values of equity, fairness, and inclusion modeled by all school staff?				
4. Is the code of student conduct applied fairly and equitably to all students?				
5. Are acceptable standards for students' behavior (both in person and online), language, and dress non-discriminatory?				
6. Do school assemblies, special programs, and speakers reflect the diverse nature of the school and larger community?				
7. Are the people involved in planning school events and programs (athletic, arts, service-learning or volunteer, PTA/PTO, etc.) representative of the school community by race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender, gender expression, sexual orientation, religion, or disability status?				

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
8. Do all segments of the school community participate in and are encouraged to attend school events (including service-learning or volunteer opportunities, PTA/PTO, etc.)?				
9. Are school emblems, mascots, team names, and other symbols free from racial, ethnic, socioeconomic, national origin, language, sexual, gender identity, gender expression, religious, sexual orientation, or disability bias?				
10. Does the virtual and in-person library/media center have recent visual, print, and non-print materials that accurately provide information about diverse student groups in traditional and non-traditional roles?				
11. Are materials, notices, and other school communication available in multiple languages, and accessible to individuals with disabilities as required?				

## Staff

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Do staff set expectations, teach, and reinforce positive behavior; support students to get back on track; and hold all students to consistent standards of behavior?				
2. Are consequences for student actions, such as discipline infractions and praise, distributed equitably in the classroom?				
3. Is there an equitable distribution of highly qualified teachers across classrooms?				
4. Are highly qualified teachers representative of the racial, ethnic, socioeconomic, national origin, language, sexual, gender or gender identity, religious, sexual orientation, or disability status composition of the student body?				
5. Is the school staff's composition representative of the racial, ethnic, socioeconomic, national origin, language, sexual, gender identity, gender expression, religious, sexual orientation, or disability status composition of the student body and larger school community?				
6. Are staff members of different races, ethnicities, languages, national origins, sexes, gender identities, gender expressions, sexual orientations, and/or with different disabilities distributed equitably across the various job classifications from administration to non-certified positions?				
7. Are all staff members responsive to the varied needs of demographic groups and communities in the school?				
8. Do staff members communicate on a regular basis with other staff members from culturally diverse backgrounds?				

## Assessment/Placement

Criteria/Questions		Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1.	Does the school/school system have a policy regarding developing and administering culturally responsive assessments?				
2.	Do teachers collaborate with families regarding the expectations of distance learning and student academic progress and achievement?				
3.	Are multiple instruments used for student assessment, including performance measures?				
4.	Are students given access to resources, facilities, and academic placement dependent on individual talent, skill, and interest?				
5.	Are English Learners properly identified, assessed, and placed?				
6.	Are assessment procedures and accommodations available for English Learners and students with disabilities?				
7.	Are all assessment data analyzed according to individual student progress as well as disaggregated patterns and outcomes by the following?				
7a.	Race				
7b.	Ethnicity				
7c.	Socioeconomic status				
7d.	Gender				
7e.	Disability				
7f.	Language				

## Professional Learning

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. In order to ensure flexible, heterogeneous, and integrated grouping within classes, are teachers trained in a variety of instructional approaches to meet differing learning preferences and foster both competitive and cooperative skills?				
2. Are staff members trained to identify equity needs and to utilize instructional methods to meet the learning preferences of diverse students and groups in a virtual classroom environment?				
3. Are equity issues in professional learning activities relevant to current events and community needs?				
4. Have all staff members received in-service training regarding strategies for countering bias?				
5. Have all staff received training on culturally responsive practices to support English Learners?				
6. Have all staff received training on how to adjust the way they talk to provide opportunities for English Learners to acquire academic language (Cognitive Academic Language Proficiency or CALP) and social language (Basic Interpersonal Communication Skills or BICS) (e.g., speaking clearly, having a slower rate of speech, using simple sentence structures, repeating/paraphrasing as necessary, etc.)				
7. Have all staff received trauma-informed training to support student success and well-being using restorative practices?				
8. Are opportunities provided for staff at all levels and in all job descriptions to obtain in-service training regarding educational equity issues and concerns relevant to specific populations?				

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
9. Are in-service opportunities offered to encourage dialogues between policymakers, administrators, teachers, support staff, and families, as well as business and community leaders, to develop comprehensive strategies for addressing equity issues?				
10. During professional learning events, are translators and interpreters available for participants from different language or disability groups?				
11. Is content training offered to provide staff with curricular information and knowledge that positively affirms and values cultural differences to enhance educational equity?				
12. Do staff members receive training in culturally responsive communication and practices to increase their effectiveness in working with diverse populations?				
13. Are critical educational issues addressed in ways that do not stereotype or stigmatize particular groups?				
14. Are presenters and facilitators of in-service training programs representative of the racial, ethnic, socioeconomic, national origin, language, sexual, gender identity, gender expression, religious, sexual orientation, or disability status groups of the student body and larger school community?				
15. Are professional learning techniques delivered authentically and in a way that is relevant to diverse groups?				
16. Are staff equipped with the skills, knowledge, and expertise to develop partnerships with families that are built on trust and respect and enhance students' learning and well-being?				

## Standards and Curriculum Development

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Are all teachers involved in improving the curriculum through continuous and systematized feedback and revision, so that all students can learn and achieve at high levels?				
2. Are all families and students encouraged to provide feedback on educational programs, both planning and instructional?				
3. Are all students held to the same standards?				
4. Do all virtual education materials provided by the school meet the criteria set by the Web Content Accessibility Guidelines (WCAG) 2.0?				
5. Is digital content accessible on a wide variety of devices that are available to students and their families?				
6. Does the curriculum utilize accessible digital and print materials that represent diverse groups?				
7. Do teachers leverage in-person and virtual classroom lessons to increase awareness and counter the past effects of bias and discrimination?				
8. Do recommended textbooks and other instructional materials reflect, as much as possible, the experiences and perspectives of diversity among racial, ethnic, socioeconomic, national origin, language, sexual, gender identity and expression, religious, sexual orientation, or disability status groups?				

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
9. Are the teachers' classroom activities and examples culturally responsive according to race, ethnicity, national origin, language, sex, gender identity and expression, religion, and disability?				
10. Does the curriculum infuse culturally responsive information into instructional approaches?				
11. Does the curriculum prepare students for a diverse society and workplace?				
12. Are people with disabilities shown in the curriculum actively interacting with both people with and without disabilities?				
13. Is language used that does not stereotype people or groups?				
14. Is person-first language used (e.g., "individuals with mental health conditions" rather than "mentally ill individuals") to recognize the innate and equal value of individuals before ascribing other identities or descriptors?				
15. Does the curriculum suggest ways to examine the perspectives and contributions of people of different races, ethnicities, socioeconomic statuses, national origins, languages, sexes, gender identities and expressions, religions, sexual orientations, or disability statuses in every subject area, especially in mathematics, science, social studies, history, and English?				
16. Are teachers encouraged to use and provide examples produced by people of different races, ethnicities, socioeconomic statuses, national origins, languages, sexes, gender identities and expressions, sexual orientations, religions, or disability statuses as part of the curriculum?				

Source: Elements of Equity: Criteria for Equitable Schools Developed by Jill Moss Greenberg and Susan Shaffer, Mid-Atlantic Equity Consortium, Inc., 1991, 2016, 2020, 2021

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# Criteria for an Equitable Classroom

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An equitable classroom reflects the overall school environment and is characterized by:

1. An inclusive climate and visual environment;
2. Culturally responsive pedagogy, instruction, curricula, and materials;
3. A wide variety of instructional strategies to meet differing learning styles, second language acquisition, and backgrounds;
4. Utilization of student and family funds of knowledge and outside resources to provide diverse tools, strategies, and role models;
5. Encouraging student ownership in learning by incorporating student voice, choice, and feedback with classroom assignments and activities;
6. Availability of extracurricular activities to enrich the curricula and provide culturally-rich experiences, as health and safety guidelines permit;
7. Building and sustaining partnerships with all families and communities, including racially, culturally, and linguistically diverse families and communities, that are linked to student learning and involve varied aspects of the educational program; and
8. Recognition of multiple intelligences and student strengths through academic opportunities, honors, leadership roles, and creative options.

Below is an explanation of the scale used to rate each item.

1. **Latent (0 Points)** - This rating corresponds to teachers in a classroom setting currently not doing anything, or having no system in place as it relates to the question.
2. **Emergent (1 Point)** - This rating corresponds to teachers in a classroom setting having some systems in place, but the systems are not explicit or strong. The district might still be working towards establishing policies and norms related to the topic of the question.
3. **Established (2 Points)** - This rating corresponds to teachers in a classroom setting having established explicit systems in place. In many cases, to be rated as established, the district/school has to have created documentation regarding the question's topic.
4. **Advanced (3 Points)** - This rating corresponds to teachers in a classroom setting going above simply establishing explicit systems. This rating is reserved for items where a policy, process or norm is centered on equity. A district/school scoring "advanced" is focused on creating an environment that acknowledges and addresses equity complexities.

## Academic Placement/Tracking and Grouping

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Does the teacher use flexible and heterogeneous grouping to provide enrichment and leverage higher-order thinking skills for all students in different subjects and activities?				
2. Are students reassessed regularly for appropriate academic placement and content?				
3. Does the teacher assign projects and other structured group activities to integrate all students regardless of race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity, gender expression, sexual orientation, religion, or disability status?				
4. Are special efforts made to achieve classroom integration when students self-segregate in the classroom (including teams for contests, groups for instruction, and other forms of classroom organization)?				
5. Are educational decisions based upon student profiles that include family, student, and teacher recommendations, as well as classroom assessments, interest inventories, and performance measures?				
6. Does the teacher share student data on academic performance, unpack school standards, and collaborate on various educational goals (including language development, IEP, and 504 plans) with families and students?				
7. Does the teacher provide regular and meaningful opportunities for all students and their families to discuss and collaborate on student social-emotional well-being?				
8. Does the teacher request interpreters or translators when interacting with students' family members who require such services?				

## Student Leadership and Recognition

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Does the teacher structure classroom activities in order to promote the development and exercise of leadership skills among all students, including racially, culturally, and linguistically diverse students?				
2. Does the teacher encourage all families and other community members of diverse backgrounds to act as role models and help students to develop their abilities and obtain needed resources?				
3. Does the teacher facilitate diverse student representation in curricular, extracurricular, and co-curricular activities?				
4. Does the teacher nurture student self-esteem through the study of student backgrounds, languages, and cultures?				
5. Are there established areas of recognition and processes for honoring students' contributions, growth, achievements, and services?				
6. Are there opportunities to enable racially, culturally, and linguistically diverse students to develop leadership skills in problem-solving and intergroup communication?				

## Classroom Environment

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Are expectations for students equitable regardless of race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity or expression, sexual orientation, religion, or disability status?				
2. Are all classroom procedures, practices, and norms, including calling on students and grouping students, integrated and equitable?				
3. Are the instructional materials culturally inclusive and unbiased regarding race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity or expression, sexual orientation, religion, or disability status?				
4. Are classroom tasks distributed equitably regardless of race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity or expression, sexual orientation, religion, or disability status?				
5. Do educational materials depict students' diversity in a variety of roles regardless of race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity or expression, sexual orientation, religion, or disability status?				
6. Is there an effort made to use unbiased verbal and nonverbal language in the classroom?				
7. Does the teacher develop an invitational environment where commonalities are appreciated and differences are understood and valued?				

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
8. Does the teacher invite families to share their expertise and incorporate students' and families' funds of knowledge into in-person and distance learning?				
9. Does the teacher collaborate with families to ensure continuity of learning throughout the school day during distance learning?				
10. Does the teacher collaborate with families and community partners to align strategies for supporting students' social-emotional well-being?				

## Instructional Strategies

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
1. Does the teacher differentiate instruction based on student needs (e.g., English language proficiency level, learning preferences, etc.)?				
2. Does the teacher set consistent expectations and classroom norms, and use logical consequences for student behavior that encourage self-regulation?				
3. Does the teacher praise students for the intellectual quality of their work, regardless of the student's race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity, gender expression, sexual orientation, religion, or disability status from a set of criteria that is known and understood by the students?				
4. Does the teacher promote cooperation and integration of students through activities which help students to work together more effectively?				
5. Does the teacher provide students with choices and accompanying criteria to show their learning in various ways and take ownership over their learning?				
6. Does the teacher use research-based instructional strategies, such as differentiation, project and place-based learning, English language learning strategies and supports, and other teaching methods to support the diverse learning needs of students?				
7. Do students, especially English Learners and students with disabilities, have access to classroom accommodations to facilitate their learning?				

Criteria/Questions	Latent (0)	Emergent (1)	Established (2)	Advanced (3)
8. Does the teacher develop appropriately challenging lessons and instructional supports to meet the needs of English Learners at their language proficiency level and balancing the four domains of language (reading, listening, writing, and speaking) to ensure they are accessing content and developing English proficiency through in-person and distance learning?				
9. Do English Learners have multiple opportunities to practice oral language by building content knowledge and using vocabulary that is linked to a specific theme and/or real-world experience?				
10. Does the teacher communicate high expectations and respect for all students including equitable praise, questioning, wait time, and feedback?				
11. Does the teacher include equitable opportunities for participation in classroom discussion?				
12. Does the teacher analyze their own interactions with students to determine any differential patterns, and take actions to counteract and balance differences?				

# Teacher Behaviors

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In this self-reflective tool, teachers will respond to checklists to: (1) measure their strengths in encouraging students' persistence in learning and (2) mark areas for self-improvement. To accurately respond, teachers should begin each question below with "Does the teacher...," checking the appropriate column on the right with their answer.

Below is an explanation of the scale used to rate each item.

- **Never (0 Points)** - This rating corresponds to practices/activities that a teacher never uses or does.
- **Rarely (1 Point)** - This rating corresponds to practices/activities that a teacher seldom uses or does. These practices are not the usual way the teacher behaves.
- **Usually (2 Points)** - This rating corresponds to practices/activities that a teacher does more often than not.
- **Always (3 Points)** - This rating corresponds to teacher practices/activities that a teacher does on a regular basis. A teacher scoring "always" is focused on creating an environment that acknowledges and addresses equity complexities.

# Instructional Strategies

Criteria/Questions		Never (0)	Rarely (1)	Usually (2)	Always (3)
1.	Ask challenging and engaging questions to develop higher-order and critical thinking skills?				
2.	Communicate high academic expectations to all students, with a primary focus on student growth, learning, and social-emotional well-being?				
3.	Communicate requirements for successful completion of assignments clearly and definitively, in a way that all children can understand?				
4.	Adjust vocabulary and rate of speech used by teachers to provide opportunities for English Learners to acquire academic language (Cognitive Academic Language Proficiency or CALP) and social language (Basic Interpersonal Communication Skills or BICS) (e.g., speaking clearly, having a slower rate of speech, using simple sentence structures, repeating/paraphrasing as necessary, etc.)				
5.	Facilitate access to classroom modifications and accommodations to facilitate the learning for students with disabilities?				
6.	Facilitate access to classroom modifications to facilitate the learning for English Learners?				
7.	Develop appropriately challenging lessons and instructional supports to meet the needs of English Learners at their language proficiency level and balancing the four domains of language (reading, listening, writing, and speaking) to ensure they are accessing content and developing English proficiency through in-person and distance learning?				
8.	Encourage all students to explore new ideas and approaches to problem-solving?				

Criteria/Questions		Never (0)	Rarely (1)	Usually (2)	Always (3)
9.	Encourage student self-assessment and evaluation to identify strengths and opportunities for growth?				
10.	Use research-based instructional strategies to support the diverse learning needs of students?				
11.	Analyze the impact of research-based instructional strategies on students' learning and make appropriate adjustments in strategies?				
12.	Monitor student progress to assess appropriate interventions?				
13.	Encourage students to set realistic time frames for completing assignments?				
14.	Help students identify milestones in reaching their goals?				
15.	Celebrate student milestones?				
16.	Utilize student mistakes as an opportunity for learning and growth?				
17.	Provide students with choices and accompanying criteria to show their learning in various ways and take ownership over their learning?				
18.	Provide opportunities for all students to access a variety of learning strategies (visual, tactile, kinesthetic, auditory, etc.)				
19.	Use flexible and heterogeneous grouping to provide enrichment and leverage higher-order thinking skills for all students in differing subjects and activities?				
20.	Assign projects and other structured group activities to integrate all students, regardless of race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity, gender expression, sexual orientation, religion, or disability status?				

Criteria/Questions	Never (0)	Rarely (1)	Usually (2)	Always (3)
21. Share student data on academic performance, unpack school standards, and collaborate on various educational goals (including language development, IEP, and 504 plans) with families and students?				
22. Provide regular and meaningful opportunities for all students and their families to discuss and collaborate on student social-emotional well-being?				
23. Request interpreters or translators when interacting with students' family members who require such services?				

# Curriculum Strategies

Criteria/Questions	Never (0)	Rarely (1)	Usually (2)	Always (3)
1. Develop high-quality lessons, assignments, and instructional supports appropriate to students' learning needs, including the needs of English Learners and students with disabilities?				
2. Develop an invitational environment where commonalities are appreciated, and differences are understood and valued?				
3. Invite families to share their expertise and incorporate students' and families' funds of knowledge into in-person and distance learning?				
4. Provide opportunities for students to relate their experiences to the curriculum?				
5. Identify current events as learning opportunities?				
6. Leverage in-person and/or virtual classroom lessons to increase awareness and counter the historical effects of bias and discrimination?				
7. Provide a variety of choices in curriculum content and activities?				
8. Identify the long-term applications and uses of the knowledge and skills which students could acquire from working through challenging activities and coursework?				
9. Embed opportunities for practice of social-emotional skills and competencies within the curriculum?				
10. Provide challenging work with appropriate scaffolding and support so that all students achieve at high levels?				
11. Use culturally responsive pedagogy, practice, and instructional materials that reflect diversity?				
12. Encourage students to consider which points of view in lessons and assignments are focused on and which are left out?				

## Classroom Management Techniques

Criteria/Questions		Never (0)	Rarely (1)	Usually (2)	Always (3)
1.	Involve students in establishing consistent expectations and classroom norms (whether in-person, hybrid, or virtual)?				
2.	Involve students in developing culturally responsive discipline rules and explain them clearly to all students?				
3.	Promote cooperative and collaborative behavior by encouraging students' participation in in-person and virtual classroom management decisions?				
4.	Assign in-person and virtual classroom management responsibilities among all students to promote the development and exercise of leadership and problem-solving skills?				
5.	Include equitable opportunities for participation in in-person and virtual classroom discussion?				
6.	Analyze their own interactions with students to determine any differential patterns, and take actions to counteract and balance differences?				
7.	Demonstrate flexibility, fairness, and compassion in situations which lead to conflict and potential in-person and virtual classroom disruption?				
8.	Make efforts to address disruptive student behaviors privately in order to support individual growth and positive behavior?				
9.	Encourage and praise students' work and contributions equitably and consistently, regardless of the student's race, ethnicity, socioeconomic status, national origin, English Learner status, sex, gender identity, gender expression, sexual orientation, religion, or disability status?				

## Interpersonal Practice

Criteria/Questions	Never (0)	Rarely (1)	Usually (2)	Always (3)
1. Assess student social-emotional needs regularly in order to make appropriate supports available and to foster strong relationships?				
2. Facilitate diverse student involvement in curricular, extracurricular, and co-curricular activities?				
3. Share problems and persistence techniques?				
4. Encourage cooperation between students?				
5. Learn and use names that students identify as their preferred names and personal pronouns?				
6. Work to develop a non-academic, personal connection with each student?				
7. Admit own learning role by acknowledging information shared by students?				
8. Make referrals to others (Student Assistance Program Team, school nurse, guidance counselor, etc.) to provide additional supports for students, as needed?				

## Teacher Behaviors That Encourage Student Persistence

Criteria/Questions		Never (0)	Rarely (1)	Usually (2)	Always (3)
1.	Respect students' thoughts, feelings, insecurities, and concerns?				
2.	Establish a supportive relationship that helps students know they are liked and expected to succeed?				
3.	Share positive messages and concerns with all students' families in a way that all families can understand?				
4.	Build effective partnerships with students' families to support student learning and well-being?				
5.	Provide avenues for families and other community members of diverse backgrounds to advocate for their students and help students to develop their abilities and obtain needed resources?				
6.	Collaborate with families to ensure continuity of learning during distance learning?				
7.	Model language used in creating an inclusive classroom?				

Excerpted from Bessie C. Howard's Learning to Persist, Persisting to Learn, published by the Mid-Atlantic Center, adapted 2016, 2020, 2021.

# WestEd VITAL Collaboration: Lesson Tuning Protocol

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## Purpose

The purpose of this protocol is to support collaborative conversations around the tuning or validation of curriculum, instruction, and assessment resources. Please note that the times below are based on a forty-five minute time frame. Adjust times as needed.

## Preparations and materials

Make sure you have enough copies of the following documents.

- Completed Prep Sheet for Tuning
- Relevant Lesson Materials & Data
- Copies of Tuning Protocol

## Process

1. Determine Roles and Set Norms (1 minute)
  - Roles: Facilitator, Presenting Teacher(s), Time Keeper, Note-Taker, Other: \_\_\_\_\_
  - Norms: Pausing, Paraphrasing, Posing Questions, Putting Ideas on the Table, Providing Data, Pay Attention to Self and Others, Presuming Positive Intentions, Other: \_\_\_\_\_
2. Present Materials (3 minutes)
  - Presenter provides important background information about specific classes and students' needs.
  - Presenter shares any relevant student work and/or formative assessment data.
  - Presenter provides brief overview and description of the materials.
  - Presenter describes the objective of the lesson and explains how it will be measured.
3. Determine the Focus for Feedback (1 minute)
  - Presenter poses a question or identifies an element of the lesson for the group to focus on to guide feedback.
4. Review and Clarify Materials (3 minutes)
  - Read/review materials.
  - Ask clarifying questions that prompt answers with QUICK responses – e.g. yes/no.
5. Review the Focus Standards (10 minutes)
  - Identify and discuss the stated and implied knowledge and skills in the focus standard.
6. Tune the Lesson (25 minutes)
  - Identify lesson elements to focus on for feedback.
  - Silently read, analyze, and take notes.
  - Share praise of effective practice.
  - Discuss and offer feedback.
7. Reflect on Conversation (2 minutes)
  - Beginning with the presenting teacher, participants share insights and take-aways from the conversation.
  - Facilitator collects feedback about the process.
8. Schedule Observation - If Applicable
  - Determine if presenting teacher is interested in a follow-up observation. If so, schedule a date.
  - Clarify what the observation will look for.

WestEd. (2017). Lesson tuning protocol. In VITAL Collaboration Facilitator's Guide. San Francisco, CA: Author. Retrieved from: <https://www.wested.org/service/vitalcollaboration-developing-and-revitalizing-professional-learning-communities>. Permission to reproduce with the WestEd copyright notice is hereby granted. For more information, visit [WestEd.org](http://WestEd.org) or contact Kevin Perks at [kperks@wested.org](mailto:kperks@wested.org).

# General Equity Questions Worksheet

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## Premise

- Segregation/isolation can take many forms and is a district-wide issue.
- Effective teaching and learning to meet the needs of all students is at the center of dismantling segregation/isolation.
- All stakeholders necessary for effective teaching and learning are the same stakeholders that should be aware of the issues (data, etc.) pertaining to segregation/isolation.

**1. How will integration be included in all conversations, decisions, and considerations regarding teaching and learning?**

Example: When choosing new textbooks, curriculum, or teaching approaches, consider the effect of that decision will have on various populations and groups in the school/district.

**2. If we make this decision, take this action, or go in this direction, which students will benefit and which students will be adversely affected?**

Example: Will the selected integration approach place inequitable burden for change on students and families of color?

**3. How will this decision, action, or direction affect the teaching and learning of various populations or groups in the school/district?**

Example: Are students of color receiving highly leveraged, evidence-based academic support? Is there clear and measurable progression in the academic achievement of low-income and students of color? Students whose first language is one other than English? Special education student? Etc.?

**4. Is there segregation/isolation in any other areas of the school or district: gifted and talented; discipline; special education; honor society; extracurricular clubs or activities? How might our school/district culture and climate support or contribute to this occurrence?**

Note: Most times if isolation is occurring in one school or program it is also present in other areas within the school or district.

**5. When posed with any kind of isolation or disproportionality (gifted and talented; discipline; special education; honor society; extracurricular clubs or activities) we routinely ask the questions: Why might this be the case? What assumptions are we working from? What are the spoken and unspoken expectations for the population(s) involved?**

Note: Are there systemic mechanisms in place for continuous review and improvement?

## Community/Stakeholder Involvement

- What voices are at the table and what voices are missing?
- What avenue(s) are currently in place to ask for and receive input or another perspective on this issue?
- What stakeholder(s) might be concerned or bothered if they knew or were aware of the data regarding isolation? What concerns would they raise and why?
- Who do we need at the table to take action?

# Theory of Action Worksheet

<p><b>Inputs</b> What we invest</p>	Internal	<p><b>Assumptions</b> Why these sets of inputs, actions, and outputs will lead to desired outcomes?</p>
	External	
<p><b>Actions</b> What we do, who will do it, and how will it be done</p>	Tasks	
	Process	
<p><b>Outputs</b> End products and action</p>		
<p><b>Outcomes</b> What happens as a result of these actions e.g. changes in students, capacities, partnerships, policies, practices</p>	Intermediate	
	Long Term	

# Planning How to Measure Actions Worksheet

Action	Indicator	Tool

# Models of Integration



- Equitable or Controlled Choice
- District Consolidation
- Inter/Intra-District & Two-Way Transfers
- Rezoning/Re-Districting
- Strategic Placement of Specialized Schools & Programs
- Inclusive Special Education Program
- Two-way Bilingual
- Redistributing of Grades/Princeton Plan/ Pairing School

## Equitable or Controlled Choice

Districts offer families a choice from an array of diverse schools. They assign students based on those selections, taking into account family preferences and the demographic makeup of students. Magnet or themed schools are frequently a component of an equitable-choice model.

### Examples

#### Hartford Public Schools, CT

Hartford Region Open Choice Program. Greater Hartford Regional School Choice Office. Retrieved from <http://www.choiceeducation.org/hartford-region-open-choice-program>.

#### Jefferson County Schools, KY

Bridges, K. (2016 October 14). Jefferson County Public Schools: From Legal Enforcement to Ongoing Commitment. The Century Foundation. Retrieved from <https://tcf.org/content/report/jefferson-county-public-schools/>.

#### Omaha Learning Community, NE

Nebraska State Department of Education. 2014-2015 State of the Schools Report. Retrieved from [https://reportcard.education.ne.gov/Default\\_State.aspx](https://reportcard.education.ne.gov/Default_State.aspx).

#### San Diego Unified School District, CA

School districts: intradistrict attendance (Assemb.) AB 1114, Chapter 161 (Cal. Stat. 1993). Retrieved from [http://www.leginfo.ca.gov/pub/93-94/bill/asm/ab\\_1101-1150/ab\\_1114\\_bill\\_930721\\_chaptered](http://www.leginfo.ca.gov/pub/93-94/bill/asm/ab_1101-1150/ab_1114_bill_930721_chaptered).

(Excerpted from the NYSED Integration Resource Guide)

## District Consolidation

In consolidation, two or more districts come together to form a larger, regional district. This centralization of management increases efficiency and reduces the number of administrative units for higher-level managers. Consolidation advantages may include the ability to offer more specialized classes or equitable distribution of teachers.

### Examples

#### **Jefferson County Schools, KY**

Ross, A. (2015 September 3). JCPS desegregation timeline. Courier-Journal. Retrieved from <http://www.courier-journal.com/story/news/education/2015/09/03/jcps-desegregation-timeline/71637432/>.

#### **Starkville Oktibbeha County Public School District, MS**

Lewis, L. (2016). The Hechinger Report. Retrieved from <http://hechingerreport.org/what-happens-when-two-separate-and-unequal-school-districts-merge/>

#### **Morris School District, NJ**

Tractenberg, P., Roda, A., & Coughlan, R. (2016). Remediating School Segregation. The Century Foundation. Retrieved from <https://tcf.org/content/report/remediating-school-segregation/>. <https://tcf.org/content/report/remediating-school-segregation/>.

## Inter/Intra-District & Two-Way Transfers

Inter-district and two-way transfers refer to two or more districts agreeing to allow students to attend school outside of their home district.

Intra-district agreements are within district transfers, allowing students to attend schools outside of their neighborhood. Such transfers might include magnet schools, charter schools, or other public schools.

### Examples

#### **Rochester City School District, NY**

Finnigan, K.S. & Stewart, T.J. (2009). Interdistrict Choice as a Policy Solution: Examining Rochester's Urban-Suburban Interdistrict Transfer Program (USITP). Vanderbilt University. Retrieved from [http://www.vanderbilt.edu/schoolchoice/conference/papers/Finnigan-Stewart\\_COMPLETE.pdf](http://www.vanderbilt.edu/schoolchoice/conference/papers/Finnigan-Stewart_COMPLETE.pdf).

#### **Eden Prairie Schools, MN**

Minneapolis Public Schools. (2016) "The Choice Is Yours" Minnesota Program. Retrieved from [https://schoolrequest.mpls.k12.mn.us/the\\_choice\\_is\\_yours\\_minnesota\\_program](https://schoolrequest.mpls.k12.mn.us/the_choice_is_yours_minnesota_program)

#### **Hartford Public Schools, CT**

Quick, K. (2016). Hartford Public Schools: Striving for Equity through Interdistrict Programs. The Century Foundation. Retrieved from <https://tcf.org/content/report/hartford-public-schools/>.

#### **Omaha Learning Community, NE**

Nebraska State Department of Education. 2014-2015 State of the Schools Report. Retrieved from [https://reportcard.education.ne.gov/Default\\_State.aspx](https://reportcard.education.ne.gov/Default_State.aspx).

#### **San Diego Unified School District, CA**

San Diego Unified School District. 2017-2018 Enrollment Options Guide. Retrieved from [https://www.sandiegounified.org/sites/default/files\\_link/district/files/enrollment-options/catalog/2017-18/2017-18\\_EnrollmentGuide\\_SDUSD\\_ENG.pdf](https://www.sandiegounified.org/sites/default/files_link/district/files/enrollment-options/catalog/2017-18/2017-18_EnrollmentGuide_SDUSD_ENG.pdf).

## Rezoning/Re-Districting

Rezoning and redistricting is the practice of augmenting existing school district boundaries or student attendance zones to draw students from a wider geographic area to promote greater integration.

### Examples

#### **Lower Merion School District, PA**

Lattanzio, V. (2009). Lower Merion Approves Unpopular Redistricting Plan. NBC Philadelphia. Retrieved from <http://www.nbcphiladelphia.com/news/local/Lower-Merion-Approves-Unpopular-Redistricting-Plan.html>.

#### **Jefferson County Schools, KY**

Ross, A. (n.d.). JCPS desegregation timeline. Louisville Courier Journal. September 3, 2015. Retrieved March 31, 2017, from <http://www.courierjournal.com/story/news/education/2015/09/03/jcps-desegregation-timeline/71637432/>.

#### **Charlotte-Mecklenburg Schools, NC**

Phase II: Home Boundaries. 2017-2018 Student Assignment Review. Retrieved from <http://www.cms.k12.nc.us/cmsdepartments/StudentPlacement/PlanningServices/20172018StuAsgnReview/Pages/JJ-Home-School-Boundaries.aspx>.

## Strategic Placement of Specialized Schools & Programs

Districts create specialized schools or programs to attract students and then strategically locate these schools or programs to promote the equitable distribution of students. These programs or schools might be theme-based (STEM, arts, law, etc.) or offer programs not otherwise available in schools. (universal pre-kindergarten, two-way bilingual or dual language programs, etc.)

### Examples

#### **Dallas Independent School District, TX**

Learned-Miller, C. (2016). Dallas Independent School District: Integration as Innovation. The Century Foundation. Retrieved from <https://tcf.org/content/report/dallas-independent-school-district/>.

#### **Upland Unified School District, CA**

Huberman, M., Navo, M., & Parrish, T. (September 2011). Academically Strong California Districts for Students in Special Education. California Comprehensive Center at WestEd, Ii-15. Retrieved from <http://www.smcoe.org/assets/files/about-smcoe/superintendents-office/statewide-special-education-task-force/Acad'y%20Strong%20CA%20Districts%200911%20CA%20CC%20Special%20Education%20Report.pdf>

#### **Diverse by Design Schools**

A growing number of charter schools are including diversity as a central component of their design. Whereas some research has highlighted the segregated nature of most charter schools, increasingly charters around the country are emphasizing diversity along with academics, hence the name "Diverse by Design Schools." Bricolage Academy and Larchmont Charter Schools are two examples of diverse by design schools. <http://hechingerreport.org/in-new-orleans-and-nationally-a-growing-number-of-charter-schools-aspire-to-be-diverse-by-design/> and <http://www.larchmontcharter.org/diverse>

## Inclusive Special Education Program

Integrated co-teaching programs purposely integrate special education students, depending on their needs, in schools and classrooms with general education students. Classrooms are assigned a general education and special education teacher that prepare and co-teach together. This model might be a component of a strategically placed specialized school or program.

### Example

#### Upland Unified School District, CA

Huberman, M., Navo, M., & Parrish, T. (September 2011). Academically Strong California Districts for Students in Special Education. California Comprehensive Center at WestEd, li-15. Retrieved March 31, 2017, from <http://www.smcoe.org/assets/files/about-smcoe/superintendents-office/statewide-special-education-task-force/Acad'yly%20Strong%20CA%20Districts%200911%20CA%20CC%20Special%20Education%20Report.pdf>

## Two-way Bilingual

Two-way bilingual programs or schools offer students with different home languages instruction in English and another language, thereby providing multicultural and bilingual exposure to all students and fostering bilingual proficiency. This model might also be a component of a strategically placed specialized school or program.

### Example

#### San Diego Unified School District, CA

San Diego Unified School District. 2017-2018 Enrollment Options Guide. Retrieved from [https://www.sandiegounified.org/sites/default/files\\_link/district/files/enrollment-options/catalog/2017-18/2017-18\\_EnrollmentGuide\\_SDUSD\\_ENG.pdf](https://www.sandiegounified.org/sites/default/files_link/district/files/enrollment-options/catalog/2017-18/2017-18_EnrollmentGuide_SDUSD_ENG.pdf).



## Redistributing of Grades/ Princeton Plan/Pairing School

A plan to maximize diversity within schools by making the entire district a single attendance zone and grouping smaller numbers of grade levels in each school. The approach organizes schools by grade span, not geographic location.

### Example

#### Clinton Public Schools, MS

Ogden East School and Jenner School, Chicago Public Schools, IL  
Source: NYSED Socioeconomic Integration PLC, Albany, NY, June 29, 2018.

PART 4:

# Final Thoughts

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## Final Thoughts

This Playbook was designed to support stakeholders interested in pursuing integration policies and practices. Some models for integration were briefly introduced, but the specific approach and the “plays” will vary from one community to the next.

Although the Playbook outlines a number of steps, it is likely the mindset of those implementing the plan that will ultimately determine the level of success or failure. A mindset of continuous improvement will prompt and challenge all stakeholders to continuously seek actions that yield the intended results. Integration efforts are often bold initiatives that challenge long-standing assumptions. Even as progress is made, a fraction of the school community will hang onto those long-standing assumptions.

Much time and energy will be spent revisiting long-standing assumptions and explaining how things have changed for schools stuck on a less desirable path.

In a more favorable path, stakeholder time and energy will be spent refining the theory of action and forging ahead with next-level implementation efforts. These will likely evolve from an initial focus on school choice efforts to increased time and energy around school improvement, school culture, talent development, and family engagement.

We welcome your feedback about the Playbook and stories about your implementation journey.

PART 5:

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# Further reading from MAEC

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[Equitable Access: Case Studies on Reducing Racial Isolation Through Socioeconomic Integration](#)

[Promoting School Equity: Lessons from the Socioeconomic Integration Community of Practice](#)

[A Data Inquiry Guide for Exploring Equity Issues and Solutions](#)

[Time to Act: How School Superintendents Keep Equity at the Center of Their Leadership](#)

[Getting Started: With Restorative Practices in Schools](#)

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