Equity Warriors

To equity warriors—past, present, and future—dedicated to fulfilling the promise of public education for each and every student

Equity Warriors

Creating Schools That Students Deserve

George S. Perry, Jr.
with Joan Richardson

Foreword by Larry Leverett

A Joint Publication

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Foreword

By Larry Leverett

> *An organization cannot flourish—at least, not for long—on the actions of the top leader alone. Schools and districts need many leaders at many levels.*
>
> Michael Fullan, 2002

The pandemic and the national reckoning on racism have taken the bandage off the deep racial disparities in health, education, wealth, and numerous other systems that perpetuate systemic failures for Black and Latinx children in America. As painful as this period has been, it also has awakened many white Americans to the need to do more to resolve the disparities in all facets of American life.

That means this is a very hopeful moment.

It means we may be at a place where most Americans can agree that inequities exist in our schools and that it's time to address them because they diminish all of us. Hopefully, that means we may finally be able to make the changes that we need. But we cannot make those changes by using the thinking we relied on in the past.

Believing that only the leader at the top can effect change is thinking we should have left behind in the last century. It didn't work well then, and it definitely won't deliver what we need for our future. The work of equity requires all of us to bring our best selves to the front. Regardless of our role, we have work to do, and that is work that we must do together.

Advancing equity has been George Perry's life work. I've known and worked with George since I was a rookie superintendent in Englewood, New Jersey, and George was my go-to partner. I continue to draw on his knowledge to inform the work of the New Jersey Network of Superintendents, a 12-year-old professional community of practice that focuses on capacity building of equity-focused superintendents.

In 2006, we framed the work of the Panasonic Foundation to focus on equity-driven systemic change by supporting superintendents and school boards in large urban districts that were

struggling with organizational cultures experiencing various forms of resistance to advancing equity. Then we went to work! George led several partnership teams that engaged superintendents, school boards, and central office leadership teams in developing systemic approaches to creating and sustaining equitable practices, policies, plans, and support systems. The foundation partnered with Perry and Associates, Inc., to advance equity from the classroom to the boardroom, relying on their experience in coaching teacher and school leaders at all levels, as well as the district leaders who support them. Our courageous partner districts made and sustained gains on our shared mission to "break the links" between race, poverty, and educational outcomes by improving the academic and social success of *ALL* students: ALL MEANS ALL.

For this book, George draws on his experience working with schools and districts across the country. He does not offer a prescription for how to achieve equity in schools. Instead, he suggests new and proven ways of thinking about how such a goal can be accomplished. He rightly understands that urgency means educators must redirect the system we have and that leaders at all levels of the enterprise have work that only they can do. As George demonstrates with story after story, educators have been successful at working within the existing system and producing change. If others can do it, you can do it too!

We experienced this kind of change in the cause of equity when I was superintendent in Plainfield, New Jersey. When I arrived, the district was 90 percent Black and Latinx students, with 75 percent of the students qualifying for free or reduced-price meals. Fewer than 25 percent of the students met minimum performance levels on state tests. The community was disengaged and apathetic. Low expectations prevailed. Collective bargaining units were constantly in conflict with the school board and district leadership. The school board was focused on patronage, jobs, and contracts with preferred vendors. Students and staff had a low sense of efficacy, and most residents and staff had little faith that improvement was possible. Parents suspected that the school system that had failed them would also fail their children. Naming and blaming was a too-frequent activity in the organization.

But, during my eight-year tenure in Plainfield, we were able to rock and roll on tackling system issues and made significant progress on a number of student performance outcomes. We moved toward an equity-focused culture. We became a mission-centered school district that engaged students; parents; staff at all levels; unions; clergy; and community, business, and nonprofit leaders in planning the transformation of the

Plainfield Public Schools. We faithfully marched toward reinvigorating the spirit and culture of the school and community and set this as our mission statement: "Whatever it takes to build an educational system for all students to achieve academic and social success. No alibis. No excuses. No exceptions."

My work as superintendent changed to include much more time in classrooms. I broadened my knowledge of best instructional practices to create access and success for all learners so that I could become a more effective observer in classrooms. Because I had experienced the value of personal reflection, I encouraged staff at all levels of the organization to engage in the rituals and routines of reflective practice. I studied superintendents who had embraced their responsibility to address racial disparities. I actively sought out proof points of districts and schools that were thinking differently about how to break the links between academic and social success and the race, ethnicity, and socioeconomic status of students.

Because I changed how I worked, the district could change how it worked. We provided opportunities for teachers, parents, and community members to share responsibility for moving equity work forward—ensuring that we included critics as well as supporters. We collected data and shared it to support transparency regarding our progress and failures. We distributed leadership to provide a clear decision-making process. We shifted staff development from sit-and-get sessions facilitated by outside experts to offerings led by our own teachers, principals, or central office staff. Self-organized parent groups explored solutions to real-life challenges and barriers that adversely affected student success. The board worked closely with me to develop equity-focused policies and monitored the implementation of adopted policies and processes that encouraged equity and accountability. We included the community in dozens of community-centered conversations that were held in living rooms, community spaces, and churches and helped refine the changes we needed. Plainfield became the pearl of my career as a superintendent.

In Plainfield, we coined the term "equity warriors" to name those who embraced this cause. People were proud to be known as equity warriors and celebrate the contributions of everyone who was invested in making change happen.

- Equity warriors passionately lead and embrace the mission of high levels of achievement for all students, regardless of race, social class, ethnicity, culture, disability, or language proficiency. Regardless of their role in a school, district, or community, equity warriors see themselves as having the

power to influence the teaching and learning agenda in meaningful ways.

- Equity warriors often act outside their formally assigned roles. Their influence is not based on hierarchical roles. They communicate effectively and persistently with diverse publics to influence the core business of schools and districts. They participate successfully in cross-functional teams. They work to improve their knowledge, skills, and dispositions. They engage in risk-taking. They model the values, beliefs, and behaviors for others to emulate in the quest for higher levels of learning for all groups of children and youth.
- Equity warriors are driven by personal values and beliefs, and have an area of knowledge or expertise that they are passionate about. They contribute freely to equity work beyond their assigned role and are willing to grow and learn to become more effective in advancing the equity agenda in their school, district, or community. They are committed to social justice and recognize that any effort to achieve equitable outcomes for *all* learners requires their participation and presence in the generation of solutions.

Today's leaders must create conditions that will grow cohorts of equity warriors who are willing to engage in the sustained work necessary to achieve equity. These warriors must operate at all levels of the organization. As George rightly points out in this book, leaders at the district level have different work to do from leaders at the school level. All of that work is significant, and all of it must occur simultaneously and in concert. Achieving equity in school systems demands no less.

The time is right for us to move forward. Seize the opportunities presented by this moment to move your schools and districts toward equitable learning for all children. Become an equity warrior!

Acknowledgments

First and foremost, I thank Laurie Perry, my wife and life partner, our sons George III and Jeffrey, daughter-in-law Kristen, and my parents, George and Della Perry, for their love, support, and inspiration. They stood by me even though I was less of a presence in their daily lives than was right or than they deserved. They permitted me to be an equity warrior.

Equity warriors are part of a critical mass. In politics, diplomacy, and warfare, there is no "I," only we. Most often, the "we" in this book refers to the Perry and Associates consultant team, an extraordinary group of equity warriors who are committed to social justice and are gifted leaders and teachers of adults and students. Their deep instructional knowledge and their passion for equity and learning continue to inspire admiration. They are dedicated district and school practitioners who gave of themselves to coach others and deserve much of the credit for supporting our partner districts. They are Ivan Alba, Allan Alson, Holly Culbertson, Laurie Kinzman, Connie Jensen, Lamont Jackson, Staci Monreal, Jelia Perez, Sandy Rogers, Tiffiny Shockley Jackson, Cynthia Terry, and Jennifer White. I am indebted to Cynthia, Holly, Lamont, and Tiffiny for their critical read and feedback on earlier drafts, and their contributions to this book.

Another extraordinary group of equity warriors is the Perry and Associates team of researchers and writers responsible for our efforts to advance special education reform in New York City. The "we" in this case is a team of research and policy advocates that included Carol Wright, Nancy Baez, and Elizabeth Rockett Sullivan; research associates Kaili Baucum Sanderson, Joyvin Benton, Tonya Leslie, Joseph Nelson, Liza Pappas, and Elizabeth Rivera Rodas; and assistants Hanna Baker, Adam Briones, Melissa Brown, and Brad Reina.

I was fortunate to have M. Hayes Mizell, a champion of civil rights and middle school reform, as a mentor, critical friend, and supporter. Hayes asked the tough questions about any school reform effort, including professional learning, that did not lead to student achievement. He held a high standard for advancing equity; provided districts, schools, and support organizations with enormous resources as director of Edna McConnell Clark

Foundation's Program for Student Achievement; and held us all accountable for delivering on the vision.

In 1995, with a newly minted doctorate, I joined the Panasonic Foundation as a senior consultant. The foundation's mission was to partner with school districts willing to break the links among race, poverty, and social outcomes for all students: All Means All. I am indebted to its first executive director, Sophie Sa, for the opportunity to learn and explore ways to advance equity alongside school board members, superintendents, and union leaders across the country. The learning opportunities allowed me to collaborate with some of the leading education researchers, reformers, and practitioners as we applied cutting-edge thinking to the real-world complexity of school districts.

I used to think that I knew what it meant to advance equity. It wasn't until Larry Leverett became the foundation's executive director that I understood that advancing equity requires each of us to look inward and challenge ourselves. He was my mentor and guide, and we pushed each other through hard conversations informed by the reality of public education. Larry and our colleagues, particularly Barbara Anderson, Kaili Baucum Sanderson, and Alan Alson, helped me wrestle with questions about race and privilege. We shared values and a commitment to advancing equity, which allowed us to challenge and question each other and self-reflect without blame and divisiveness. Together, we created a safe space to experience the struggle and grow in our understanding of what it takes to effect meaningful change.

Advancing equity is a journey. Our three decades of advancing equity with districts and schools across the United States allows us to draw on many examples of equity work, some successful, some not. We are able to draw on specific schools and districts to show the reality of how equity efforts play out in practice. Some of the many equity warriors it has been my privilege to know are named in the examples taken from our first-hand experiences working with the following districts and schools: Atlanta, Boston, Baltimore County (Maryland), Chicago, Corpus Christi (Texas), East Baton Rouge (Louisiana), Elgin (Illinois), Flint (Michigan), Hartford (Connecticut), Jefferson County (Louisville, Kentucky), Los Angeles, Long Beach (California), Marin City (California), Metropolitan Nashville, Milwaukee, Montgomery County (Maryland), Newark (New Jersey), New Jersey districts, New York City, Norfolk (Virginia), Oakland (California), Portland (Oregon), Roanoke (Virginia), Santa Fe and rural northern New Mexico districts, and Stamford (Connecticut).

I did not know Dan Alpert before we submitted our proposal to Corwin, or so I thought. Many of the books on my bookshelf

that have contributed to my learning and influenced my thinking were published by Dan and Corwin. His contributions to advancing equity and broadening our knowledge are immense. On the first read, Dan understood the possibility of having leaders from the classroom to the boardroom engage together in a multidimensional approach to advance equity. His excitement, support, and encouragement pushed us to get this done. I am grateful to Dan and the Corwin team of Lucas Schleicher, Mia Rodriguez, Natalie Delpino, Tori Mirsadjadi, Amy Marks, and Scott Van Atta.

Finally, Joan Richardson deserves much of the credit for *Equity Warriors* becoming a reality. I met Joan when she was communications director for the National Staff Development Council, which is now Learning Forward. I would read her editor's columns and marvel at her skills and insights when she served as editor in chief of *Phi Delta Kappan* magazine for 10 years. I jumped at the opportunity to collaborate with her, and the result is this book. I could not have anticipated the effort needed for this project. Joan has been there, patiently, every step of the way. She is an honest thought partner and colleague who guides, clarifies, and pushes. I deeply appreciate her contributions to the content; her nudging and redirection; as well as the time, effort, and expertise she gave to create this book. It is not an oversimplification to say that *Equity Warriors* would not have happened without her.

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From October 2018 to December 2021, **George S. Perry, Jr.,** Ph.D., served in the New York City Department of Education and the Chancellor's Office as the director of school leadership and organizational alignment. In this role George supported the assessment, alignment, and implementation of citywide equity and values-centered leadership development for teacher, school, and district leaders.

Before joining the New York City Department of Education, George was executive director of Perry and Associates, Inc., a national consulting firm, founded in 2001, that acts on its commitment to social justice and equity by assisting district and school leaders to improve the academic achievement of *all* students.

George has 40 years of experience in education at the national, state, and local levels. George directed experienced, highly successful consultant teams in building instructional leadership capacity at the district and school levels. He and his colleagues assisted school boards, superintendents, and district and school leaders to transform central offices to support schools; strengthen instructional leadership capacity by fostering vertical coherence from the classroom to the boardroom; redesign systemwide systems of support for students with disabilities and family engagement; strengthen principal instructional leadership; accelerate middle and high school level academic achievement; and develop prototype curricula.

George and his colleagues guided over 100 underperforming schools in Corpus Christi, Flint, Long Beach, Los Angeles, and San Diego to raise and sustain student achievement by improving instruction, building on strengths, and using data and research-based strategies.

The district and school partnerships have been successful in raising student achievement, closing achievement gaps, and preparing students for college and careers. Three partner districts have won the prestigious Broad Prize for Urban Education, awarded annually for raising student achievement and closing achievement gaps.

In addition, George served as the senior education advisor during the 2013 campaigns and on the transition teams of Mayor Marty Walsh of Boston and Mayor Bill de Blasio of New York City.

Beginning in 1994, George was a senior consultant with the Panasonic Foundation, working on district-level, systemic improvement and assisting school boards, superintendents, and district and association/union leaders to "break the links" between race, poverty, and achievement for all students: All Means All. In this role, George assisted district leaders on their journey toward advancing equity as a "critical friend" and coach. With his support, leaders built their capacity to think and plan strategically and systemically, identify barriers to improvement, and address significant challenges through creating conditions for systemwide change and enhancing leadership skills and actions.

George holds a doctorate in public policy analysis from the University of Illinois at Chicago, a master of education degree from Harvard University, a master of business administration degree from Babson College, and a bachelor of science with honors in secondary education from Northeastern University.

For more information or to share your experiences as an equity warrior, join us at www.equity-warriors.com.

Joan Richardson is known as an excellent editor, writer, and researcher with deep expertise about education and for being a creative and strategic thinker who excels at transforming publications and rethinking organizational efforts to deepen impact in schools and influence quality of learning. In addition to spending hundreds of hours visiting U.S. schools, she has extensive experience visiting and writing about schools abroad—Canada, China, Denmark, England, Finland, France, Germany, Haiti, and the Netherlands.

She was editor in chief of *Phi Delta Kappan* magazine, the flagship publication of PDK International (pdkintl.org), for 10 years and also director of the PDK Poll of the Public's Attitudes Toward the Public Schools, the nation's longest-running public opinion survey about K–12 education.

Before joining PDK in 2008, Joan served as communications director for the National Staff Development Council (now Learning Forward) for 12 years. In that position, she was executive editor of *JSD* and also the creator, editor, and writer for the NSDC newsletters—*The Learning Principal*, *The Learning System, Tools for Schools*, and *Teachers Teaching Teachers (T3)*—and manager of the organization's extensive website. She also directed NSDC's book publishing operations and website, and its media outreach efforts.

Prior to her work in the nonprofit sector, Joan worked for 22 years as a newspaper reporter and editor. In her last newspaper job, with the *Detroit Free Press*, she focused on issues and trends in education, including coverage of the early days of charter schools in Michigan. Her previous newspaper jobs included stints at the *Indianapolis Star* and the *Peoria Journal Star*.

She designed and launched *All Things PLC*, a magazine published by Solution Tree Press. She is the author of *From the Inside Out: Learning From the Positive Deviance in Your Organization* (NSDC, 2004). She served on the Grosse Pointe (Michigan) Board of Education for six years, including one term as president.

Joan was a Michigan Journalism Fellow (1988–1989), studying the economics of globalization on American business and American life. She received her bachelor's degree in journalism and history from Indiana University.

PART I

Build an Equity Agenda: Student Data

INTRODUCTION

The problems of the world cannot possibly be solved by skeptics or cynics, whose horizons are limited by obvious realities. We need leaders who dream of things that never were and ask why not.

John F. Kennedy, 1963

The victories of good warriors are not noted for cleverness or bravery. Therefore their victories in battle are not flukes. Their victories are not flukes because they position themselves where they will surely win, prevailing over those who have already lost.

Sun Tzu, about 500 B.C. (Cleary, 1988)

Advancing equity requires vision and strategy. Equity warriors begin by having a vision of school systems as they want them to be. The vision drives them to ask questions about *what is* in order to take themselves and others on a journey to *what can be*. Equity warriors also know that it takes more than ideals to change the world. They begin by examining and understanding the situation they face, their assets, and their challenges. They act!

Equity warriors begin by having a vision of school systems as they want them to be.

Equity warriors use their vision as a lens through which they examine systems by collecting and using qualitative and quantitative data. They examine data that tell the experiences and reality of students—who they are, what they know, what they see, how they are treated, and what they need. Equity warriors use data as the primary tool for naming the problem or describing the current reality. Doing so helps set the direction and share the vision that equity warriors hope to achieve. The willingness to see students in the data enables leaders and others to be ready and prepared for change and to surface potential allies and

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opponents in the journey toward the vision. Knowing the allies and opponents equips equity warriors to identify strategies that will be effective in advancing equity.

Equity warriors use data as the primary tool for naming the problem or describing the current reality.

In naming the problem, equity warriors become more effective when they engage others in verifying the strengths of current efforts and challenges in facing existing problems. Data essentially say, "Don't take my word for it, see for yourself." Equity warriors use data to make a path and protect their vision from cynics and apathetic protectors of the current reality.

Data illuminate each situation and enable all stakeholders to understand the mission. Examining data enables educators to apply resources and talents where they will have the greatest effect, and it helps measure progress toward goals.

But getting to a place where data can play a significant role in moving toward an equitable system of learning involves far, far more than merely knowing which test scores to examine. Foolishly rushing in to erect data walls and dashboards without laying an appropriate foundation is a recipe for disaster.

There is no single vision of equity that can be applied uniformly across districts and schools. In Part I, equity warriors gather data to understand student experiences; learn how to analyze and name problems, allies, and assets; and identify tools for engaging in various contexts and assuming responsibilities. Using data effectively to assess current conditions requires knowing which politics, diplomacy, and warfare moves are available to equity warriors at the district and school levels—and to make moves in concert.

CHAPTER 1

District leaders define equity by knowing students and finding allies

POLITICS: BALANCE CONFLICTS TO BUILD AN EQUITY AGENDA

Equity warriors know that to address systemic inequities deeply embedded in their organization—whether intended or not—they need to balance inherent conflicts among internal and external groups, and manage a change process. It is unrealistic in most cases to set the bar at resolving conflicts. Politics is an unending process, not a destination. We earlier defined politics as balancing conflicts to govern humans effectively. In the context of building an equity agenda, politics creates a balance that makes advancing equity possible.

Harvard Business School professor John P. Kotter (1996) studied change in large corporations and cautioned leaders to refrain from identifying solutions when starting a change process. Too often, the message is "here is the problem, and here is what we are going to do about it." District and school leaders are often assumed to know the solution and/or are expected to demonstrate leadership in order to direct the outcome. When leaders introduce the solution up front, they do not engage and do not convince. They do not build the trust necessary for those who are skeptical to think differently. They have not asked for help. They have asked for something to accomplish their objectives. They have not led—they have dictated.

Equity warriors work toward building a bold vision that may not unify all internal and external stakeholders but will set a direction for the work to move forward. Building a vision requires maintaining the "just right" balance between guiding and distancing themselves from the process. Equity warriors know not to try to impose their vision. After all, they are not solely responsible for the schools, districts, and communities where they work. They are part of a whole. At the same time, equity warriors are not seeking consensus. Too often, leaders find that waiting for everyone to be on board allows a small minority to stand in the way of advancing equity. Creating momentum with the intent of building a critical mass is enough to launch a meaningful equity agenda. Equity warriors move to a bold vision by creating the opportunity for each of us "to be touched, as surely they will, by the better angels of our nature" (Lincoln, 1861). To begin, equity warriors must understand the parameters of the situation in which they operate.

YOUR MOVE: KNOW THE DANGERS INHERENT IN USING ACHIEVEMENT GAP DATA.

Effective governance requires balancing conflicts and is key to political success. Decisions about using limited resources

introduce inherent conflicts between and among groups. Nobody can have everything all the time, which means that leaders make multiple decisions about who receives resources and when.

In public education, a fundamental conflict that plays out continuously is answering the question about the best way to accelerate student success—particularly the differences in closing achievement and opportunity gaps. Equity warriors use data to shine a light on problems. But they analyze the community's readiness to receive the data and then decide where to point the light and whether the light is a spotlight (pointed at specific data) or a floodlight (examining all data). They understand the importance of crafting their message along with data to shed just the right amount of light on the right problem at the right time. Not for the faint of heart!

National efforts have failed to avoid the dangers of not balancing conflicts effectively. Starting with the enactment of the Elementary and Secondary Education Act (ESEA) in 1965, there has been a political tension around measuring the effect of federal dollars on student achievement for children who live in poverty. Congress and presidents have questioned whether federal funds—although rarely more than 10 percent of total spending on public education—yielded results. Through succeeding decades, political parties embraced either an opportunity gap or an achievement gap approach to federal policy and spending decisions. The difference is important.

Those who see *opportunity gaps* believe federal dollars would be best spent leveling the playing field for students. Students living in poverty should have access to conditions for success—instructional resources and high-quality instructors—just as much as their more privileged peers. Federal funding would provide for professional learning, libraries, school meals, and additional services to multilingual learners and students with disabilities.

Those who see *achievement gaps* believe federal dollars would be best spent identifying the problem, applying resources, and holding people accountable. Testing would identify the learning needs of students, which would enable teachers to attend to the gaps. Government would set the standards to be met, provide tools to measure progress toward the standards, and help schools—through state education agencies—use the tools to define the learning needs of students and create a plan to address the needs. Government would apply sanctions (a softer term than punishments) to schools that fail to close the gaps.

The 2002 reauthorization of ESEA that was No Child Left Behind (NCLB) brought together the opposing views by providing an additional $14 billion or a 34 percent increase in federal funding for testing, high-stakes accountability, and teacher development. NCLB made more money available for improving the conditions for learning while also ramping up accountability measures. In essence, the federal response was to forge a compromise and attempt to close opportunity and achievement gaps. Generations will live with the results of that compromise.

Certainly, NCLB cast a spotlight on schools that did not serve students well in a way that had not happened in many places previously. Around that time, the principal of the largest underperforming middle school in an urban district told me her superintendent had not visited her school once during her five years as principal. The superintendent confirmed that he devoted his time to issues at schools serving politically savvy middle- and upper-middle-class parents and communities. He knew they were holding him accountable. He also understood that NCLB changed the game by giving voice to underserved families that did not have political capital.

The NCLB compromise created many problems for advancing equity. Let's look at two fundamental political problems.

The first political problem is that closing achievement gaps pits winners against losers and creates conflicts over limited resources of attention, time, and money. Closing achievement gaps assumes the government will provide objective measures of proficiency on grade-level, standards-based work. But the achievement standard is typically set by the performance of Asian and white students. Educators can close the gap in only two ways: by increasing the performance of students at the bottom or decreasing the success of students at the top. In some places, there is real fear that equity warriors are actively contemplating the latter. That fear sometimes manifests itself in arguments claiming that resources will be diverted from those who are doing well to those who are not. Sometimes, the arguments include blaming or claims that resources are wasted on the undeserving. But, if more money is not the answer, then what is the point of arguing?

The second political problem is that identifying racial/ethnic groups at the top and those at the bottom can reinforce established stereotypes and undermine trust in data and those who provide them. Let us be clear: Exposing racial predictability in systems is critical to naming the problem to solve. Equity warriors must not back away from exposing systemic racial or class bias and

must continue to name each student group by disaggregating data. Educators and policymakers must not revert to a time—as was the case before NCLB—when disaggregating data was against the law in some states. That practice was intended to hide the reality that public schools were not serving all students equally.

Equity warriors must not back away from exposing systemic racial or class bias and must continue to name each student group by disaggregating data.

Stereotyping based on performance data is present when it confirms our biases or perspectives that students of color and students living in poverty underperform, and that white and Asian students perform at higher levels. It is a stereotype consistent with what has been taught or learned. Reactions to data that confirm stereotypes include acceptance, guilt, blame, and anger—to name just a few. Equity warriors should anticipate different and multiple reactions even when results confirm accepted stereotypes.

Depending on our lens, disaggregating performance data also can result in mistrust of the performance measures themselves. If the results confirm our perspective, we accept the legitimacy of the measures; if not, we challenge the results. For example, educators express very legitimate concerns about test administration. Did students take the test seriously? Is the assessment valid? Were students taught the assessed content or skills? What is the cut score, and how was it determined? What can we do after we learn the results? Will we receive them in a timely manner and be able to act on them? In other words, educators often believe that assessments don't measure what students know.

What happens when performance results do not match our perceptions of who "should be" at the top? Psychologist Donald T. Campbell (1976) captured this idea in what came to be known as Campbell's Law: "The more any quantitative social indicator is used for social decision making, the more subject it will be to corruption pressures and the more apt it will be to distort and corrupt the social processes it is intended to monitor" (p. 49). In other words, when the target is wrong, people will game the system. In service of equitable outcomes, well-intentioned federal, state, and district leaders set targets for graduation rates, grade point averages, and suspension rates. The higher the stakes, the more likely that processes used for positively affecting the results will be corrupted. We have seen this law play out in states and districts when the results were considered wrong. Either the test is flawed or cheating occurred.

Atlanta Public Schools, a school district of 51,000 students in Georgia, exemplified these fundamental problems.

The central office of Atlanta Public Schools is housed in an exceptional building completed in 2005. Called the Center for Learning and Leadership, the building is designed to be functional and efficient. It is home to central office functions that were once scattered across the city and is a central location for professional learning. Fostering collaboration and learning are key themes reflected in the design throughout the building. Each floor contains work and meeting rooms where cross-functional teams can meet, plan, and work together. The building design is one of the symbolic ways that Beverly Hall, superintendent from 1999 to 2010, made her priorities known.

Large posters with bar graphs adorned the walls of the cabinet meeting room on the top floor of the building, adjacent to the superintendent's office. Each poster displayed information about one of the superintendent's performance targets and showed how each school in the district did against the district performance target over the past three years. This is the room where Hall met with principals and teachers and with visitors from outside the district.

These prominently displayed posters were intentional. First, the posters let all visitors, particularly those within the district, know that the superintendent valued school performance on the targets established by the district. The posters were kept up to date, which also demonstrated that the superintendent was carefully watching schools and their performance. In case visitors were not clear, Beverly Hall was known to refer to the posters to make a point during a meeting. She was conversant about each school and each performance target and expected the same from those who worked in the district—particularly those who worked in the schools displayed on the walls. Finally, the performance targets were present to remind visitors that the superintendent was being transparent. Those in the district—central office leaders and managers and principals—were well aware that their performance and their annual bonuses were tied to the performance of schools on the wall, as was the superintendent's performance and bonus. There were years in which Hall did not receive a bonus because the district's performance had not met expectations. There were many more years when she did. Improving student performance was not only business, it was personal.

Atlanta became a success story, and Beverly Hall was recognized as a champion of underserved students. She was named National Superintendent of the Year in 2009 and credited with transforming the school district. Student performance on state tests increased. Principals had three years to ensure that their schools met the

growth target set by the district. If the school did not meet the target, the principal was removed.

Then, in 2011, special investigators found that 178 teachers and principals at 44 schools had cheated by changing student answers on state tests; 82 ultimately confessed to cheating during the investigation. The Fulton County prosecutor indicted 35 educators on charges stemming from the cheating scandal. Twenty-one Atlanta educators reached plea deals, and 11 were convicted of racketeering charges in 2015 (Kasperkevic, 2015).

In the beginning, Atlanta was a beacon of hope for those of us who believed in the power of standards-based systems to improve opportunities for underserved students. It was the exemplar of an achievement gap–closing district that used accountability systems to benefit students. Gains made by students began to debunk the myth that poor, inner-city Black students could not overcome conditions and achieve at high levels. The symbolism of making progress in Atlanta, so influential in the civil rights movement and the burial place of Martin Luther King Jr., was not overlooked. Its promise was that a tough-minded leader who believed it could be done with a "take-no-prisoners" approach was all that was needed for success.

The Atlanta story is sad on many levels. In fairness, Beverly Hall, who believed strongly in creating an accountability-based system in service of underserved students, passed away before she had the opportunity to defend herself against charges that she knew cheating occurred. Nevertheless, the Atlanta story and similar stories on a smaller scale in other school districts seemed to support Campbell's Law and the political pressures that can occur when groups are pitted against each other. When corruption was found in Atlanta, it further reinforced the myth that students in that district could not be successful unless cheating was involved. As we will discuss in later chapters, competition or setting the dichotomy of winners and losers does not advance equity.

Community members and parents continue to be interested in achievement data that can show a return on their investment. Yet, interest seems to be waning. Take the National Assessment of Educational Progress (NAEP), known as the nation's report card. The NAEP is administered in every state that receives federal Title I funding. The test identifies representative

samples of students at random, and authorized monitors in controlled environments administer assessments that measure student knowledge against national frameworks. Nothing compares to the objectivity and comparability of these results. Nevertheless, even in districts that have shown and tried to celebrate growth compared to other districts, there is little fanfare. There are other examples. Massachusetts students have some of the highest scores on what is considered a rigorous state assessment—results that compare favorably on international metrics. Yet communities and parents continue to complain about the student performance of Massachusetts public schools.

Even though community interest in the achievement gap is diminishing, it is still a political problem for equity warriors to manage. When to use a spotlight or a floodlight depends on a calculus of anticipated reactions. Waning interest in understanding achievement data provides an opportunity for rebalancing the achievement gap conversations. We will discuss how equity warriors can reframe the conversation after we examine opportunity gaps more closely.

YOUR MOVE: DEFINE EQUITY USING OPPORTUNITY GAP DATA.

Knowing how much the community believes in closing the achievement gap or how much it believes in closing the opportunity gap is important to the equity conversation and ultimately the political survival of district initiatives.

Those who advocate for closing opportunity gaps perceive the problem as a glass half full. They believe the equity agenda for student success is achieved by applying resources where there is the greatest need. Doing so gives all students access to conditions for success. As with closing achievement gaps, closing opportunity gaps creates problems for equity warriors. Let's look at two fundamental political problems: creating consensus on what we mean by equity, and adopting strategies that advance an equity-of-opportunity agenda. Let's start with defining equity.

Defining equity through opportunity gaps is even more difficult than defining equity through achievement gaps. That's because opportunity gaps are more subjective and contextual. There is agreement on baseline conditions necessary for student success, such as teachers, learning materials, and time. Baseline conditions vary widely across the country and among communities within each state and region. So, the hard questions about closing opportunity gaps are these: What are the opportunities that matter? And how much opportunity is enough?

Equity warriors take on the challenge of answering these questions by leading the community in defining equity. Writing a definition of equity is about more than just reaching consensus about a goal. Defining is about understanding and building common language to facilitate discussion, listening, and being able to alter one's perspective. The process of writing the definition also surfaces a range of perspectives about equity. Having that information is crucial to move forward.

The process of writing the definition also surfaces a range of perspectives about equity.

In every district we know, reaching consensus on a definition of equity takes time. One of the great challenges in defining equity is that stakeholders who are trying to write a definition are aware of how that definition will affect the expectations for their work. In other words, people often anticipate the implications of a definition before they settle on the definition. As a result, conversations become circular—almost like having a meeting to schedule a meeting about the need to have a meeting. Equity warriors persevere to push through the definition phase. Writing a definition is exhausting work and will be doomed to failure unless equity warriors are committed to seeing it through. What hope is there to advance equity if people can't even agree on a definition?

DEFINE EQUITY FOR YOUR DISTRICT

The process for defining equity depends on the district context and experiences.

Use your equity lens to

- Identify a guiding coalition of key stakeholders and influencers, including students
- Deepen understanding of the system's strengths and obstacles by selecting and reviewing data that tell the story of student experience
- Name the problem to be solved and strategic opportunity gaps
- Define an equity outcome that is clear, sensible to the head, and appealing to the heart
- Name metrics as part of your definition that measure progress toward your outcome

Educators often defer to how external players define equity of opportunity. The definition that says students need more to succeed is a definition that gets more play in state and federal decision making that results in more funding for students based on income, language proficiency, and disability. Decision makers accept that it is more costly to educate students who require more time or specialized services, or who are otherwise dependent on school for learning, enrichment, or basic needs of food and safety. More funding and supports are available to students designated at-risk. Compliance with state and federal requirements is not the only reason district leaders make more resources available to designated students. District leaders recognize a sense of obligation to do the right thing for students. School board members in more affluent districts, for example, often provide additional services to students with disabilities from a sense of obligation to doing the right thing, rather than from compliance—and often in response to activist parents able to tell their story.

But, similar to our achievement gap discussion, this approach pits groups against one another. Where there is a "how-about-me" ethos, more advantaged families advocate for special considerations for their children. Sports, arts, cocurricular activities, and gifted and talented programs are the result of balancing interests. It is not just families. Educators often resent Title I schools because they have more discretionary resources than non–Title I schools. Some school boards "adjust" funding formulas to include more schools in the Title I pool, which decreases dollars for schools with the neediest populations. Fair student funding formulas that are weighted toward school-dependent students are not universally in place. Even in middle- and upper-middle-class communities, when economic times are tighter, generosity tightens too.

Equity warriors have been successful using two strategies to advance an equity-of-opportunity agenda. Both strategies begin with gathering data on opportunity gaps, and both propose outcomes that are measurable. Implicit in each is how they define equity of opportunity.

The first strategy is universal access. To counter the resentments and increase the odds for sustainability, opportunity gaps measures are more likely to remain in place when there is universal access. Federal and state laws and regulations and local programs providing supports to students with disabilities are sustained even though the costs continue to consume higher percentages of district budgets. Of course, there is pushback on increased spending that affects opportunities for general education students. Opponents of increased spending focus on controlling expenses, improving efficiency, and demanding full funding from state and federal governments—they rarely say they want to deny services.

Similarly, universal pre-kindergarten (preK) programs, like those in New York City, are built on the political reality that sustainability is more likely if all parents have a common interest, even those who could afford such programs. It makes sense that children, particularly those whose first language is not English or who do not have access to enrichment activities, are better prepared for success in kindergarten if they have attended a preK program. Making pre-kindergarten available to all increases the odds that it will be considered a right, not a privilege, and will be available to those most in need.

The second strategy holds harmless and advances opportunities for more advantaged families while providing additional supports to school-dependent students. The Montgomery County (Maryland) Public Schools (MCPS) *Our Call to Action: Raising the Bar and Closing the Gap* provides an example.

Our Call to Action took a comprehensive look at the academic performance of students and showed the disparities within one of the wealthiest and largest school districts in America. As Superintendent Jerry Weast framed the question:

> [W]hat do you do if 75–80 percent of all [Black and Latinx] students live in a well-defined geographical area, 75–80 percent of all poverty is in that same area, 75–80 percent of all students learning English are in that same area, and disproportionately lower student performance occurs across the same geographical area? What do you do when that same geographical area includes more than 67,000 students, the equivalent of the 53rd largest school district in the nation, and the poverty rate of kindergarten is 50 percent and growing? (Childress et al., 2009, p. 34)

One part of the strategy was to structure a win-win situation by setting a universal target that resonated with the community. The target, referred to as the North Star, was readiness for college and high-wage work. While many leaders frame aspirational goals, Weast and his colleagues defined the milestones along the way that students would need to meet to be ready. The milestones, *Seven Keys to College Readiness*, were

- advanced reading in grades K–2;
- advanced reading on the Maryland State Assessment in grades 3–8;

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- advanced mathematics in grade 5;
- Algebra 1 by grade 8, "C" or higher;
- Algebra 2 by grade 11, "C" or higher;
- 3 on AP exam, 4 on IB exam; and
- 1650 SAT, 24 ACT (Childress et al., 2009, p. 128).

This part of the strategy was intended to increase accountability vertically and horizontally across the district. Being explicit about the benchmark served to arm parents—those able to be more actively engaged in supporting their children as well as those who are more school dependent—with knowledge that can push conversations with educators about whether students are on track for success. This approach assumes that more actively engaged parents would push their children's schools and that teachers and schools would push accountability vertically. For example, if a district expects all students to participate in advanced mathematics in grade 5, grade 5 teachers are more likely to push vertically to ensure that teachers prepared students to be ready for advanced work. Counting on parents and more effective schools to do their part, district staff could focus attention on schools that served school-dependent students.

Another part of the MCPS strategy was the superintendent and board's guarantee that district per-pupil spending levels would remain the same for students outside of the high-poverty areas (Green Zone). While schools in the Green Zone would be in effect held harmless, the district would increase per-pupil spending to schools in the high-poverty area (Red Zone), along with increased accountability. At least in the short term, the district had addressed the fear of loss among more affluent families.

Reaching consensus and acting on resource distribution so that students have what they need to be successful is not enough. It is not enough because that approach operates from a deficit model: It suggests that district leaders are doing for students who can't do for themselves. Of course, students need support. Students who don't enter kindergarten able to read need more support than students who do. Students who live in temporary housing need more support than students who do not have obstacles preventing them from attending school each day.

However, equity warriors must be vigilant in defining equity to challenge the implicit and explicit messages that students and their families who attend our schools are "less than"—that we are here to take from ourselves in order to save them from miserable and horrible conditions, and give them a chance. Although well-intended, those of us who entered the field of education—as we did—to provide all students the same opportunities we hoped to provide for our children miss the point that students need to be understood for who they are, not who we want them to be.

This is a tricky proposition. K–12 education may be the only social system Americans experience in common across our nation. Its intent from the beginning is to inculcate—some say indoctrinate—generations of Americans into a common culture by providing opportunities to encounter, respond to, and be appreciated by others. Schools articulate what we should know and how we demonstrate our knowledge and skills, and they reinforce behaviors appropriate to living in a democratic society. Educators and everyone else have argued over who should control learning, but communities still end up in control by default.

Defining equity is about how the district chooses to talk about students. District-level equity warriors recognize that any deficit model creates winners and losers and therefore is not sustainable. Equity warriors recognize and celebrate each and every student—and mean it. Yet that is one piece of the puzzle. Actions matter. Leading the community through the process of defining equity creates an opportunity for educators, families, and students to learn together as they develop common language.

Equity warriors recognize and celebrate each and every student—and mean it.

It is not easy in the day-to-day of teaching and working with students for educators to reflect on biases—everyone has them—and to engage others. Yet by doing so, students and families have the opportunity to be partners in learning and in advocating for a system that works. By valuing students and families, we know them.

YOUR MOVE: CREATE METRICS THAT MATTER.

There is a lot to learn from the successes and stumbles of other equity warriors. Our starting point included a heavy emphasis on achievement data. We used data to ask questions about the data and hoped the answers would yield solutions. District and school leaders, over time, convinced us that while data are important, they really did not want to spend a lot of time

on naming the problem. They thought they knew the problem. They certainly knew they had a problem, or we wouldn't be talking.

We have come to understand that the right data set the direction, and we should focus on programs and practices that are yielding the results we desire. Frankly, we know that many of the programs and practices employed to address achievement gap measures do not have the desired effect. Yet, we keep doing them. What is the reason? There is no simple answer. Maybe we are pleased with the results because they align with our expectations, although they are not the results others are measuring.

Before NCLB, Hayes Mizell, a friend and mentor, once asked a room of Corpus Christi, Texas, educators, if there were no state assessment, what measures would they use to demonstrate student progress to the public (Mizell, 2002). Across the room, you could hear anxious muttering. Mizell went on to ask, would educators ever do the right thing for the right reasons? The room was tense. He went on to explain that schools and districts would need to begin to accept responsibility for student outcomes if they wanted to be free of external agents setting the outcomes and the measurements. In addition, schools and districts would need to make tough choices and take action when they failed to make progress toward the outcomes. Only when schools were responsible and showed they would take action would educators gain public confidence.

Mizell's question came from one who was well informed. As a civil rights leader, he operated with a moral compass evident to everyone he touched. As the education program officer for the Edna McConnell Clark Foundation, he directed the spending of nearly $90 million in a few large urban districts for more than a decade to promote middle-level school reform. He spoke with confidence of leading a major initiative over time in different urban districts. But, after a decade of helping schools with large percentages of underserved students, he was also frustrated that educators were not taking the lead to be responsible.

Can equity warriors rally the community to support an equity agenda?

This remains the question. What metrics and data will convince the public that public schools are successful? For equity warriors, the politics of determining the measures is the nub of the question. District leaders know that with community planning and a clear strategy, they can rally the majority of voters to support funding for school building or technology upgrades, even in tight economic times. Can equity warriors rally the community to support an equity agenda?

This all points to the role of district leaders in creating the narrative by framing what is most important for the district and why. Rather than telling the story in student performance data, *equity warriors tell the story in terms of conditions of success*. What messages are compelling to parents and the community? What promises is the district willing to make to each and every student about the outcomes of a preK–12 education? What data can best tell the story? Here is where elevating student data is most effective.

We learned a lesson several years ago, in working with district leaders to create data dashboards to show students' progress on multiple measures. We convened a group of politically active parents who were engaged in the district. These were the go-to parents. We demonstrated the dashboard and how the community and families would access data on several indicators. We were convinced that we would build confidence in the district's agenda. The parents were engaged, respectful, and quiet. At the end, we pulled a parent aside and asked for her candid reaction. She said the data system was "nice," but all she really wanted to know is whether her son was on track to graduate and be prepared for college. The dashboard could not answer that question for her.

Similarly, when we were interviewing parents for a candidate in Boston's mayoral election about a contentious issue—expansion of charter schools—we heard clearly that charter schools were not an issue for families. Families wanted their children to attend a good school, but they didn't care whether the school was a charter school or a traditional public school or whether they needed to transport their children to another part of the city. They preferred to have their children in a neighborhood school, but "good" trumped distance or structure every time.

For too long, actually starting in 1983 with *A Nation at Risk*, many players have approached change by creating disequilibrium. These players suggest that public education is a problem to be solved and that they have a solution to fix it. Proponents of various sorts of change have successfully generated significant increases in federal, state, and local dollars for public education. They have encouraged alternatives to traditional public schools. This strategy has not made us feel any better about our public school system, and it hasn't produced substantial or sustainable change. That is a shame.

Equity warriors know that they must be successful in balancing conflicts if they want to lead their community's equity agenda.

Equity warriors know that they must be successful in balancing conflicts if they want to lead their community's equity agenda. To do so effectively, equity warriors understand the

conflicts that arise through attempts to close achievement and opportunity gaps; they build strategies that are right for their communities and their agenda; and they create metrics and a narrative that is personal, relevant, and honest for their communities.

REFLECTION: *What are the conflicts you, as a district equity warrior, confront? What are the parameters in surfacing your community's achievement and opportunity gaps? What is your definition of* equity *based on your context and data?*

DIPLOMACY: BUILD A CRITICAL MASS OF SUPPORT FOR ADVANCING EQUITY

As important as it is for equity warriors to identify and collect the most compelling data and to resolve conflicts to frame the narrative, diplomacy—the processes of dealing with people in a sensitive and effective way—is essential to preparing an organization's culture to achieve the vision.

Diplomacy is the process through which equity warriors ensure that meaningful, long-term change happens. Two of the three tools of diplomacy—rewards and consequences—are fundamentally transactional. For example, district leaders use

rewards of promotion, funding of initiatives, and access or preferential treatment to entice others to act in ways consistent with their wishes. Likewise, some leaders imply that consequences such as the loss of rewards, change in position or status, and even terminations will result from failure to behave in a particular way. These tools can be effective and sensitive ways to change behaviors when the transaction offers something of value to the people involved. Rewards and consequences are effective in the long term when the people involved see them as an agreement or a "contract." District leaders rely on these tools to effect change. They work well as long as the rewards and consequences are applied consistently and as long as they remain in place.

Diplomacy is the process through which equity warriors ensure that meaningful, long-term change happens.

Diplomacy is the process through which equity warriors ensure that meaningful, long-term change happens. Equity warriors have three tools in their arsenal for diplomacy work:

Rewards: Transactions that may be intangible or tangible such as access, status, recognition, preference, and autonomy as well as promotions, extra pay, reduced workload, and improved working conditions.

Consequences: Real or perceived transactions that harm or damage another. Transactions can be the opposite of rewards (e.g., exclusion from activities) that are valued, or they can create fear that a threat will take place in retribution for action.

Moral persuasion: Convincing others to take action because it is the right thing to do. Just saying that advancing equity is the right thing to do doesn't convince or move people to action. Moral persuasion aims to transform people through processes that identify motives, aspirations, and values; that seek to satisfy higher needs; and that engage others in making a commitment and taking responsibility for implementation. Effective processes recognize that individuals have options and must be convinced of the "right" option before making a commitment and taking responsibility.

The third tool of diplomacy—moral persuasion, which is convincing others to take action because it is the right thing to do—is a process that rarely yields results in the short term when sensitivity and effectiveness are at odds. For example, there are effective, well-known, and well-respected protocols for teaching about racial identity and engaging educators and other adults in interracial conversations. Districts across the country adopt and use these protocols. Nevertheless, few places use

these protocols consistently. White leaders—board members, community members, and educators—push back from uncomfortable conversations for multiple, complex reasons. Just agreeing to use a protocol is not enough.

My personal journey in confronting our awareness of race and privilege has been very well-intentioned and has been one of continual exploration of feelings and reflections. I am far from finished. Through experience, I recognize the importance of creating conditions so that participants—those internal and external to the organization—engage in hard conversations. Sensitivity and a willingness to understand initially rather than blame are critical to moving beyond superficial and reactive conversations.

YOUR MOVE: EMBRACE EXTERNAL PARTNERS AS YOU STRIVE TO ENACT AN EQUITY AGENDA.

Equity warriors persuade others that an equity agenda is in their interest.

Equity warriors persuade others that an equity agenda is in their interest. Persuasion, rather than telling, is an integral part of the change process. The audiences for these messages are both educators within the system and parents and community members who are outside the system.

Building on a foundation of data enables equity warriors to engage others in understanding the current reality and seeing progress toward prescribed goals. Embracing a change mindset enables equity warriors to engage internal and external stakeholders. Building trust is essential to building support. That means bringing stakeholders into the process and helping them verify the problem and develop a solution, not imposing a solution on them.

If others can verify for themselves that the problem exists, they begin the process of sharing ownership in solving the problem. Sharing data about the current reality also becomes a sorting activity because it will identify who will be leaders, allies, and blockers. When people who are considered objective or at least not obligated to toe the district line verify the problem, then the fence-sitters also are likely to become allies.

Not everyone, of course, will be persuaded. But knowing who is not convinced—and particularly who will be blockers—is valuable information, especially when identifying those individuals early in the process. Knowing the nonsupporters provides the opportunity to include their perspective at every stage of the process—an essential element for building trust in the process and the goal.

Helping people see the problem for themselves means embracing transparency. Those examining the problem need access to most of the information available to leaders so that exploration of the problem is real. There are obvious lines that cannot be crossed, such as personally identifying personnel and students, even if pushed. Too often, though, the overriding concern is that sharing too much of the problem will lead people to lose faith in the system. However, setting conditions for releasing information is perfectly acceptable. Bear in mind that releasing information to anyone means releasing information to everyone. Failing to be transparent about what information will be shared can jeopardize your efforts to build trust among various groups.

District leaders control how information is shared and with whom. Districts typically have processes for researchers to access district and school data. Granting access to data to build critical mass could begin by reviewing normal operating procedures for doing so. Nevertheless, it is common to claim transparency and then not share information that people have access to anyway. Family members walking through a school will notice student populations and staff diversity and make judgments about the school's policies regarding students of color. With very little effort, family members can learn from friends, siblings, social media, websites, and zip codes which middle schools are safe, which high schools are preparing students for postsecondary success, and which elementary schools have a welcoming environment. Keeping data from them does not build trust.

Charlotte-Mecklenburg in central North Carolina offers an example of a community that responded to an external prod to look at itself and developed its own response to its discoveries.

> In 2016–2017, community members in Charlotte-Mecklenburg formed a task force to study the effect of low-income neighborhoods on future economic opportunities. The impetus for the task force came from two places: The first was a Harvard University/University of California at Berkeley study that showed Charlotte-Mecklenburg was 50th out of 50 cities for upward economic mobility for children born into the lowest income quintile. The second was the killing of a Black father by a police officer in 2016.
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> Over 18 months, task force members examined three determinants with the potential to influence the opportunity trajectory for individuals: early care and education, college and career
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> *(Continued)*

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readiness, and child and family stability. They also examined two factors that cut across each determinate: segregation and social capital. They analyzed segregation through three different lenses: wealth, poverty, and race/ethnicity. They defined social capital as the relationships and networks that connect people to opportunities.

The task force's report, *Leading on Opportunity*, is a bold and unvarnished uncovering of the conditions of their community. For example, the report showed that one-third of the schools are segregated by poverty, half of the schools are segregated by race, and one-fifth are hypersegregated, meaning 90 percent of the school's population is of one race. The task force looked at policies related to housing, early care, and incarceration as well as family structure. The report begins with a call to "acknowledge the significant roles segregation and racialization have played in our current opportunity narrative and commit to becoming a more inclusive, fair, and just community." Among the task force recommendations are a heavy investment in early childhood care and education, college and career pathways, and nine strategies to address "interrelated factors that have the greatest impact on child and family stability" (Charlotte-Mecklenburg Opportunity Task Force, 2018, p. 15).

Formed in 2018, the nonprofit Leading on Opportunity—whose staff reports to a board comprising civic, government, nonprofit, and business leaders—continues to influence the community in implementing the strategies, key recommendations, initial implementation tactics, and policy considerations with the critical partners identified in the report.

District leaders have opportunities for action when they embrace external partners and seize the moment when the community recognizes the importance of addressing the vestiges of systemic racism and structural equities. Such moments and the interests of external partners can be fleeting. External partners who may have limited time to focus on complex and resistant systems can help start to build the structures necessary to sustain change. The rewards and the progress made in advancing the equity agenda need to be clear in order to sustain the moral imperative a moment launches.

YOUR MOVE: BRING THE BOARD AND PUBLIC WITH YOU.

Equity warriors have a sense of urgency to advance their equity agenda.

Equity warriors have a sense of urgency to advance their equity agenda. Some superintendents are hired by the board with a specific charge to advance equity. There are those who bring their passion for advancing equity to new situations. There are times, as was the case in Charlotte-Mecklenburg, that events spark urgency. Since decisions to advance equity are made in a public arena, equity warriors can use telling the story to generate public awareness and support their equity agenda. Telling the story must be handled carefully or it can be counterproductive, even jeopardizing the success of an equity agenda.

Superintendents who have been hired specifically to address equity challenges begin by surveying the situation while not backing away. The first questions to consider are: What is the evidence the board and community support the equity agenda? What is the status of previous attempts to move the agenda? Having the board just say to the superintendent that she has board support is inadequate. Interest in and support for equity should be evident in community and school board conversations during a superintendent selection and hiring process. If there is no evidence, that should signal caution.

There are multiple examples of equity warriors who have found they did not have the support they anticipated for the equity agenda or were out ahead of the readiness of their board and community. Sometimes, the intentions of the board and community are misleading or misread. Other times, the board and communities back away because the stakes are too high or higher than they anticipated.

High-stakes challenges to advancing equity are those where the most obvious solution is that a group will lose something it values. High-stakes challenges are particularly difficult for equity warriors because knowing the outcome limits the use of strategy and effectiveness of engaging the public. Unless there is a critical mass and momentum behind the challenge and the number of people receiving the benefit are greater than the number losing, there is rarely the political will to make significant and lasting structural change in the short term.

Take the high-stakes example of challenging the common practice of traditional public school districts that have entrance requirements and admit students to select schools or programs within schools. By law and court decisions, schools can have entrance requirements that do not discriminate

against a protected class while allowing students access to public education. Schools are considered not to discriminate even when the entrance requirements yield very small numbers of Black students admitted to select schools. District leaders who question these practices do so on behalf of disenfranchised families who are not able to challenge the system on their own.

Pushback can be considerable when a statement of the problem is accompanied by—implicitly or explicitly—the solution.

> In New York City, Chancellor Richard Carranza went on the offensive in June 2018 and publicly challenged the makeup of the city's selective high schools, where students are admitted after acing a single high-stakes exam that tests their mastery of math and English. Although Black and Latinx students make up nearly 70 percent of New York City's public school enrollment, just over 10 percent of students admitted into the city's eight specialized high schools were Black or Latinx. Stuyvesant High School, for example, which is the most selective of the specialized schools, admitted only 10 Black students in 2018. White and Asian American students are the majorities at all eight of the specialized schools. At Stuyvesant, three-quarters of the students are Asian American.
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> Changing the makeup of the student body at the exam schools means changing the way that students are admitted. Asian American groups immediately saw this as a threat and launched a campaign to retain the current policy, quickly raising dollars to lobby state lawmakers for retaining the test-based system (Harris & Hu, 2018).

Challenging high-stakes practices is not for the faint of heart! Even much lower-stakes practices, such as removing a principal, are political and come with consequences. Nevertheless, the most difficult challenges can be met given a public relations strategy, time, and perseverance. Equity warriors use a public relations strategy to tell their story. When there is clear evidence of growing support for an equity agenda over time, we have watched as superintendents frame the district's story and advancing equity as being part of its good-to-great journey. They show how previous administrations brought the district to a certain level. They engage the board and members of the public involved in selecting the new administration to share their expectations to move forward an equity agenda. They fight the urge to be the face of the equity agenda and the teller of the

story. It is the board and community story, so they should be helped to tell it.

District leaders can also seed the story. Rather than having all messages about a problem or a solution come from district leaders, leaders will sometimes openly and sometimes quietly encourage others to speak out. Sometimes seeding the story is as simple as encouraging external partners to share their stories more publicly. Other times it involves encouraging or planting stories that others can tell on the leader's behalf.

Another way to seed the story is by hiring external consultants to audit finances, facilities, curriculum, and/or programs and publicize the findings to call attention to a desired situation. There is an inherent danger in this strategy: If public funds are spent to create a report, then the report must be shared even if the results are not in line with the desired outcome. Proceed cautiously when embracing this option.

YOUR MOVE: ENGAGE STUDENTS AS VITAL STAKEHOLDERS IN THE GUIDING COALITION.

A key element of diplomacy is engaging students along with other stakeholders as partners in each step of the change process. Using compelling student data to tell stories is one part. Having students verify and communicate the problem can help build confidence that the district is genuinely interested in defining and solving problems.

Equity warriors, ourselves included, do not include students often enough. When included at all, students are invited to testify or have a spot at the table. They are sometimes invited to be panelists to open a session. We are often afraid to hear student stories about the quality of the education they receive because we are uncertain what they will say. Yet, we are moved by students telling authentic stories. Even more to the point, students know what inequity looks like and how they are affected by it. They know the expectations adults have for them. Building their skills and engaging them as partners can enable them to become effective spokespersons for equity. After all, it is about and for them!

We are often afraid to hear student stories about the quality of the education they receive because we are uncertain what they will say.

As an advisor to high school students, I learned that students could make significant contributions to policy conversations when they understood how education systems worked. Their contributions were unvarnished and authentic. They could portray the reality of schools and provide a lens into the experiences. More often than not, students could identify issues based on their experiences well before adults became aware of the issues.

Equity warriors engage students as partners alongside other stakeholder groups. That means creating a guiding coalition that gathers information and identifies alternative solutions. Kotter (1996) describes guiding coalitions as agreeing on approaches and communications that are sensible to the head and appealing to the heart (p. 66).

We recommend that guiding coalitions include no more than 20 people—large enough to represent the different roles and perspectives, yet small enough to allow for team building. The guiding coalition should include supporters and skeptics—those who believe in and drive the work and those who are not initially supportive but in positions of authority that can block progress. We have used guiding coalitions in different ways. Here is one example in which students as stakeholders and student stories were used to shine a spotlight on a challenge.

Norfolk Public Schools is a district of 33,000 students and 42 schools in Virginia. John Simpson, superintendent from 1998 to 2004, created a guiding coalition of about 20 influential parents and community, school, union, student, and district leaders to examine student literacy. His first step was to engage the coalition in reading and discussing research and articles on the effect of illiteracy on students' academic and social well-being, as well as programs and initiatives shown to improve literacy. The selected readings helped participants become empathetic to those who were not literate and outraged that system failings, not intellectual capacity, were often the cause. Once Simpson had consensus that a problem existed, he turned to the guiding coalition to determine next steps. The guiding coalition settled on creating an initial target of having all students reading at grade level by 3rd grade.

Before the guiding coalition, Norfolk's educators agreed that 3rd-grade literacy was an important education performance target. Although they worked on the issue internally, the problem persisted. What they needed was the push and support from outside the system.

The guiding coalition became a game-changer in Norfolk. The process of educating the public and sharing ownership for low literacy created a movement within the city. City government, community organizations, and business partners contributed resources, time, and energy to create an alternative reality. Community leaders turned to professional educators for their expertise in identifying which reading programs were already successful with

Norfolk students, settling on the few that best met student needs, and finding reliable assessments for reading comprehension.

The focus on literacy remained in place in Norfolk long after Simpson retired. Years later, the teachers union president, who had been a member of the guiding coalition, continued to advocate for a focus on 3rd-grade reading comprehension and to call attention when progress was not made. The story of the guiding coalition was folklore for a while—the good ol' days when the community banded together in common cause around a moral imperative.

Social media and technology provide new opportunities to engage stakeholders in contributing to decisions that impact their lives. Accessing these tools provides ways to channel creative energy and foster understanding and trust. In particular, not engaging students leaves them with no alternative than to be recipients, not participants, in the equity agenda.

YOUR MOVE: CREATE INTERNAL MUTUAL ACCOUNTABILITY BETWEEN DISTRICT AND SCHOOL LEADERS.

Advancing equity always starts and ends with student academic success. Equity warriors know that strategies and actions have a through-line to student success. However, strategies and actions are often disconnected. District leaders must avoid the tendency to slip into the wrong question—and wrong questions lurk around every corner. For example, in a conversation with area superintendents about the rollout of a new instructional framework, they voiced frustration that district curriculum leaders had not given them a clear definition of what success looks like. Is it implementing this or that instructional strategy? What is the sequence? How many teachers? What is the frequency? How do we know we are doing it correctly?

Advancing equity always starts and ends with student academic success.

These important questions need answers at various points in the implementation process. Yet, the questions need nuance for an equity agenda. Equity warriors ask questions that begin with, "Given the needs of our students . . ." or "Given the student outcomes we seek. . . ." For example, given the needs of our students—language proficiency, reading level, access to materials, instructional time—what instructional approaches should we use? Or, given that we want to increase student reading levels for multilingual learners by two grade levels in a year, what approach and structures should we use?

These questions reflect an interest in clarifying who has responsibility. The person asking the question holds part of the responsibility for the answer. She is responsible for representing the needs and outcomes or bringing clarity around a definition. My role may be to know my students. Your role is to match the resources and experiences to help me be successful with my students. Equity warriors need to be clear. To borrow a phrase from Brené Brown, clear is kind (Brown, 2018, p. 44).

It is easy to deflect responsibility for valid reasons—such as not having the support, resources, or time to address equity issues. Saying everyone is responsible for student success is easy. But the preponderance of evidence suggests otherwise. The reality is that when everyone is responsible, no one is responsible. It is much less easy to achieve accountability in the absence of a through-line from the board to the classroom that articulates responsibilities and the particular role participants play in students' ultimate success.

One way to use the tools of diplomacy is to understand the difference between adaptive and technical challenges (Heifetz & Linsky, 2002, p. 13). Based on the work of Ron Heifetz and Marty Linsky, technical challenges are those things we can apply known solutions to remedy. That does not mean that technical challenges are easy to address. In fact, some technical challenges are remarkably complex—for example, textbook adoption takes a great deal of time, involves many people, and requires approvals at many levels. The key criterion is that technical challenges can be addressed using existing or available expertise.

Adaptive challenges are those based on fundamental beliefs held by individuals or the organization. Adaptive challenges require thinking in different ways, to view a problem from different perspectives and lead from the balcony, not from the ground, in order to change beliefs that are obstacles to acting to meet new or different expectations. There may be strategies and experiences to guide us; however, the ways to address adaptive challenges may not be known to others or us. There is no guidebook or manual to help. Let's consider one strategy.

Long Beach Unified School District, the fourth-largest district in California and located south of Los Angeles, serves a diverse urban and suburban student population. It also long had a strong culture, referenced in numerous publications as the "Long Beach Way." One of the key strategies in the district has been its use of *Key Results Walk-Throughs*, which offer an approach to adaptive challenges.

Many districts use walk-throughs or learning walks as protocols for district teams to learn about school programs and/or advise school leaders on ways to strengthen practices. When these visits are more about district leaders telling or giving advice to school leaders rather than learning, the visits have little value because they are neither sensitive nor effective in changing practice. When visits are not repeated or are done infrequently, they become more like events than continuous learning opportunities. As there is limited time and resources, the visits often "help" by monitoring progress of schools.

Too often, visits suggest that district leaders have answers to the challenges facing school leaders. District leaders feel obligated to have an effect as a result of their visits. It rarely happens. Typically, one of the following occurs:

- School leaders learn more about their challenges from preparing for the visit than from the exchange of ideas with district leaders. The school benefits and moves forward.
- District leaders filter the school visit through their own past experiences and give advice based on what worked for them as school leaders. There is no application or change.
- District leaders agree or insist on providing resources or professional learning they have at their disposal. School leaders appreciate extra resources; however, the resources aren't tailored to their needs or school leaders do not know how to use them effectively. The challenges worsen as school leaders lose focus.
- School leaders are unprepared for the visit or make a poor showing. District leaders are angered and/or frustrated and decide to change school leadership or, uncertain what to do, they do not visit again.

In each scenario, the visits were not tailored to wrestle with the adaptive challenges facing the schools and the district. If district leaders believe these visits are sensitive and effective, then they are not clear about how to exercise their roles to support schools. Lack of clarity leads to blaming others. Blaming leads to frustration, negativity, and shutting down. School leaders don't seek support from district leaders because it is clear they don't know what to do.

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Long Beach Unified had a different approach. District leaders used Key Results Walk-Throughs as a key element of their high school reform efforts. At the time, the district's six comprehensive high schools enrolled 25,000 high school students. Since there were only six high schools, district leaders could visit each school three times a year. The district team included the assistant superintendent who supervised high schools, curriculum specialists from all content areas, and principals from each of the other high schools. The school teams included all administrators and teacher heads of each department. Each visit started with an overview of the schools' data since the last visit, followed by classroom visits by department, discussion of next steps, and a debrief that described agreements on next steps by all parties before the next visit.

The visits were intended to focus on the adaptive challenge of clarifying role responsibility among the district and school leaders. Specifically, Long Beach Unified had a central curriculum team that had strong knowledge about standards-based instruction. The team offered and conducted professional learning for teachers. The professional learning was thought to be well designed and rich in best practices in all disciplines. The department heads were responsible for professional learning at their schools, which they coordinated with the assistant principal or principal who supervised the department and the central curriculum team for that content area. The question was this: Are we able to see a throughline from the expectations and professional development to classroom practice?

This question is a fundamental adaptive challenge for many districts. District and school leaders and teachers make choices about what they do based on limited time and resources and competing demands. Those choices often appear as parameters around their work that are disconnected from others—for example, district leaders plan workshops, others develop or select curriculum, school leaders are responsible for all aspects of the school day, and teachers deliver instruction while maintaining discipline. Each of these areas of work has its own technical challenges. At the same time, there are adaptive challenges that grow out of fundamental beliefs and values.

Long Beach district leaders faced those adaptive challenges. They understood that if a curriculum is technically outstanding, but teachers don't understand it, then it is of limited value. If teachers are able to connect with students but do not know what academic

excellence looks like, they cannot prepare students for success. If administrators do not have a vision for how to use resources effectively to support the specific needs of their school—and stand up for what they need and push back on resources that derail their efforts—then we are wasting precious time. Vertical collaboration based on a shared sense of interdependence and collective responsibility is an adaptive challenge. It was a challenge worth facing.

It was rough going. Central curriculum specialists were not accustomed to the suggestion that they be accountable for changes in teacher practice. They had their responsibilities and work—creating curriculum units, keeping current and participating in standards development and changes, planning professional development. They really did not have time to redirect their efforts and follow their work into classroom practice, unless it was to work with individual, struggling, or new teachers in response to a request. The school leaders were not comfortable sharing their school's data with colleagues and/or admitting they were not clear about how standards-based instruction should look in content areas outside of their teaching experience. Department heads were not willing to judge their colleagues' teaching practices or willing to hold teachers accountable for what they recognized as poor instructional practice. While there may not have been tears, there was a lot of angst.

Yet, over time, Long Beach developed a strong culture that supported doing the right thing so that educators could have honest conversations about how to affect instruction so student learning would improve. Central curriculum specialists began to learn how to better design programs and support teacher learning. School administrators recognized their role as instructional leaders—not as curriculum experts but as those responsible for making certain that resources were not only gathered and used but that they were effective. Teachers felt pressure and support across the system.

Equity warriors know that the tools of diplomacy—rewards, consequences, and moral persuasion—can be helpful in fostering community engagement and critical school district conversations to advance equity. For conversations to be successful, they need to fulfill a couple of conditions. First, there must be a clear purpose and a goal (e.g., affecting student data that matters with milestones). Second, stakeholders must believe in interdependence and shared accountability. We will address the contributions of explicit values in Part II. For

Equity warriors know that the struggle for justice is a long road. Nevertheless, there are times when conflict cannot be avoided.

now, the point is that school districts do not have to be places where differences in perspective are resolved with winners and losers. Equity warriors know that the struggle for justice is a long road. Nevertheless, there are times when conflict cannot be avoided.

REFLECTION: *Can you name the external and internal stakeholders who hold the keys to establishing your community's equity agenda? What processes have you used to bring student experiences into the equity discussions? What tools of diplomacy—rewards, consequences, moral persuasion—are at your disposal?*

WARFARE: USE STUDENT DATA TO CONVINCE, QUESTION, AND TEACH

In the district-level politics and diplomacy sections, we discussed the options and challenges facing equity warriors in determining direction, readiness, allies, and strategy. We named and considered processes and approaches to bring people together around a common cause.

Nobody should charge directly into warfare. Politics and diplomacy should lay the groundwork and often can be sufficient. But equity warriors are well aware that sometimes adults do not want to participate in processes, or, worse, they stall and

undermine the work. The success of equity work is so important that equity warriors cannot give up in the face of opposition. When we are certain that we are not gaining traction, the warrior takes over.

Equity warriors cannot give up in the face of opposition.

We define warfare simply as pressuring people to stop or start acting in certain ways. Direct warfare happens when individuals with position authority stand in the way. Those who hold position authority include school board members representing more affluent communities and stakeholders within the district, elected officials having direct control or budget approval, media influencers, opinion makers, and other power brokers. It can also mean coalitions or individuals able to exert influence over those who have position authority. All politics are local. In some communities, power brokers change over time. In others, they remain.

Effective equity warriors know who might stand in the way or attempt to divert funding to a different agenda. Equity warriors make judgments about the appetite for the changes, timing, and seriousness of the opposition. Being strategic is knowing how far to push, when to push, and who to push. Some equity warriors prefer to sacrifice themselves for the cause by reaching well beyond the limits of acceptance and refusing to compromise. It might seem heroic to do so. Be bold or go home! Most often, it means the end of their effectiveness and/or their position. The worse outcome for a failed attack is to undermine efforts for the future.

Equity warriors make judgments about the appetite for the changes, timing, and seriousness of the opposition.

We approach conflicts not to vanquish opposition but to achieve our equity agenda and build and sustain changes to the organization's culture. Equity warriors know that opposition is likely to occur on two fronts—with internal and external audiences—and that not all fights are the same. As we know, warfare is about reciprocal actions, and anticipating and disarming the opposition. Sometimes a show of force and unity will be enough to eliminate any serious opposition. At other times, fleeing is an option. Data that reveal the lived realities of students are among the equity warrior's most effective tools. The following moves show how.

YOUR MOVE: USE DATA AS A WEAPON WITH EXTERNAL AUDIENCES.

Equity warriors use data as a weapon sparingly, judiciously, and strategically to correct clear injustices and send messages. Like all warfare, conflict in addressing inequity results in collateral damage and unintended consequences. So, exercise caution!

Equity warriors use data as a weapon sparingly, judiciously, and strategically to correct clear injustices and send messages.

For example, a superintendent in a high-poverty Midwestern district serving almost exclusively Black students discovered, in reviewing district data, that the small population of white students in the district were overly represented in gifted and talented programs. The superintendent convinced the school board to eliminate gifted and talented programs and adopt universal heterogeneous grouping of all classes. Before the next school year began, almost all students—Black and white—who were in the gifted and talented programs moved to other districts. While acting on principle is laudable, the consequences to the district were a disaster. Losing students and the associated funding was only part of the result. Parents did not understand and/or lost confidence in the administration, and the district lost the opportunity to choose other options, such as targeted heterogeneous grouping, to integrate students and improve learning. Charging into conflicts without anticipating the reciprocal actions is a mistake, no matter how morally right the action might be.

Equity warriors know the best avenue to success in advancing or protecting the equity agenda is to use data that matters to gain broad community support. Returning to the example of Montgomery County, Jerry Weast was effective in using performance data to show the widening gaps among economic, racial/ethnic, and native English-speaking student groups. He used the data to create a strategic response based on residential patterns. Achievement in the Red Zone was predictably lower based on the demographics of its neighborhood. The strategy met with resistance initially. Nevertheless, the use of moral persuasion and holding funding levels for high-performing residential areas in place prevailed.

Community support results when residents are convinced it is the right thing to do for their community, and it is the right thing to do for themselves. The strategies mentioned previously—universal preK, promises to hold harmless—are examples of how districts can gain broad support for initiatives. Convincing external audiences requires a strong narrative, compelling data about effect, and a critical mass of people able to influence their opinions. It means making moves in the other dimensions that are necessary to set the stage for reasoned confrontation. Then, conflicts are perceived as only one strategy or arrow in the quiver.

YOUR MOVE: TAP EXTERNAL AGENTS AS ALLIES IN ADVANCING EQUITY.

Equity warriors depend on allies. Superintendents have often used external partners to bring attention and/or pressure to

advance an equity agenda. External partners can quell external opposition or disrupt internal resistance.

Equity warriors depend on allies.

One potential external partner is the state education agency. State education agency leaders have a bully pulpit and sometimes can be seen as objective actors. We are not sure how many local leaders actually join in alliance with state education leaders. If they do, they don't publicize their efforts to do so because state and local relations are typically adversarial. However, support from state leaders is exactly the kind of alliance that equity warriors need.

I learned this lesson early on. A school that proposed major changes for underserved students received a small award from a state grant program I was managing. In confidence, I asked the principal why he would propose to do so much more than the grant required. He said he was facing resistance within his district and school and was using the grant to "require" him to make changes that he had been unable to make.

In our work leading state intervention teams, we regularly consulted with district leaders about how, as an external partner, we could support their work in the district. When a school was designated as underperforming, the state would often require the school to collaborate with an external intervention team to develop an improvement plan. A program improvement designation can cause fear and resistance at a school. We hoped that approaching the school as a partner and listening rather than telling would support positive change. Our team would conduct a two-day assessment of the school and develop a multiyear plan based on guidelines from the state. The state wanted to see improvement in student performance, and we knew the best way to achieve improvements was to have district and school leaders buy into the action steps and hold themselves accountable for implementation. So, even before we visited, we met with district and school leaders to ask for their thinking about potential recommendations. In most cases, they knew what needed to be done and were eager for the push to do so. As we gathered information from the site visit and drafted recommendations, we incorporated their recommendations. It worked! With regular visits and constant reminders to stay focused on the recommendations, and making adjustments along the way, each of the schools we supported improved student achievement and performance over time.

Philanthropy is another potential external ally. We have known district leaders who partnered quietly with philanthropies to call attention to a challenge or advance an idea that would create pressure to respond. Philanthropies advance their agendas

in different ways. Some provide grants to districts that propose or agree to participate in projects that are consistent with the philanthropy's agenda. Others have a close relationship with district leaders and are able to provide flexible funding and other resources. We have partnered with districts on behalf of philanthropies that have contracted directly with us. The following is a rare example from a national philanthropy that exemplified the ability of an external partner to help district leaders further their agenda.

From 1985 to 2018, the Panasonic Foundation partnered with public school districts interested in sharing its equity agenda. The foundation's mission, which evolved during the tenures of its two executive directors, Sophie Sa and Larry Leverett, was to partner "with public school districts and their communities to 'break the links' between race, poverty, and educational outcomes by improving the academic and social success of ALL students: ALL MEANS ALL." Instead of providing grants, the foundation entered into long-term partnerships—in some cases lasting beyond 10 years—with school districts that made a commitment to furthering an equity agenda. Its approach was to strengthen the district's leadership capacity—school boards, superintendent and cabinet, and association/union leaders—to collaboratively further the district's equity agenda. Once a partnership was launched, the foundation matched a team of senior consultants with the district in a whole-system approach fostering system-level and systemwide changes to improve learning for all students. Teams were provided at no cost to the districts.

Teams provided technical assistance through monthly visits and support for districts on initiatives specific to their equity agendas. In some cases, teams would help the district define its equity agenda. At other times, teams would introduce and/or link districts with resources and examples from other districts to prompt or augment their equity journey. Teams helped district leaders improve their capacity to collaborate by planning and facilitating quarterly or semiannual board/superintendent retreats and convening semiannual, three-day working conferences for partner districts.

The foundation engaged in more than 20 partnerships during this period. Since the team did not have a program or product that districts were obligated to accept, the initial phase was a period of negotiations and relationship building. Like all relationships, the partners learned about each other through having experiences

together. The teams lived outside the district's organizational structure. They provided district leaders with an objective, honest sounding board for their ideas and often carried messages to and among board members, superintendents, and union leaders that people internal to the chain of command were unable or unwilling to offer. Most of all, the teams' regular visits and the longevity of the partnerships allowed teams to hold up a mirror to the district leaders on their progress on their equity agenda, push and prod when necessary from the inside, and become trusted critical friends. Teams helped districts organize through transition periods. Teams sometimes became the institutional memory as the partnerships lasted longer than the tenure of two—sometimes three or four—superintendents and all of the school board members. (*Note:* In 2018, the Panasonic Corporation changed the foundation's approach to be more closely aligned to the corporation's mission. The foundation began awarding grants and closed its partnerships.)

The independence of philanthropies can help district leaders think through the strategic moves necessary to advance their equity agenda. Increasingly, philanthropies have a targeted agenda that can be at odds with the district's interests. As it is with leaders internal to the organization, philanthropies that approach partnerships knowing the answer to a challenge may force their solutions on district leaders through the promise and obligation of money. We learned the lesson that not all money is good money. Being obligated to the wrong partner is worse than not having a partner at all.

Winning support from an external partner, however, requires a willingness by the district to engage in a win-win relationship with the partner. External partners will want access to data and information. They want to be in the inside. They want to know there is a chance of success. They need to know the district is really committed to the goal. The executive director of a large community trust explained it this way: "We need to know the objective and be part of the game." With access to data and plans, he was willing to allow his organization to be a player.

As we discussed earlier, providing access to data comes with risk. The strongest approach to building allies is to be clear about the assets. What part of the equity agenda are we doing well and shows the promise of expansion? Equity warriors build confidence by having command of the strengths of the

Equity warriors build confidence by having command of the strengths of the organization, clearly defining the challenges, and providing access to supportive data.

organization, clearly defining the challenges, and providing access to supportive data. Allies who are convinced of the commitment and clear about the purpose are able to partner in creating the narrative and counternarrative to external pressures.

This approach to leadership may sound Machiavellian. It can be so, which is the reason to be cautious and thoughtful. Most of all, the approach must be anchored firmly in the equity agenda. If external partners sense that the approach is used for personal gain or to cover for the leader's inadequacies, they either will not join or could turn against it. However, we have found that external partners who share an equity agenda are waiting to be invited. They look for impact that adds value.

YOUR MOVE: ESTABLISH INTERNAL DATA PROTOCOLS TO UNDERSTAND EACH SCHOOL'S ASSETS AND CHALLENGES.

Superintendents and district leaders can use data in a direct way with internal stakeholders. Typically, district leaders assume good intentions until they confront a situation that offends them. When incidents happen, district leaders are quick to react internally to correct the situation and send messages to the broader community that they won't tolerate certain actions, and they have handled the situation. District leaders follow well-established protocols and accepted practices to investigate complaints or respond to incidents. If the situation suggests a widespread problem or where the school community—students, adults, or both—has been complicit, district teams or partnership organizations are equipped to respond to acts of bias, racially motivated actions, assault, or violence.

Equity warriors are proactive. District equity warriors have many data protocols for learning about their schools' assets and challenges. We will consider three that have been effective in strengthening district leaders' ability to identify and call attention to data that give students voice:

- Equity visits
- Root cause analysis
- Deep data dives

These protocols share two characteristics: They are intended to uncover the assets and challenges facing underserved students that aggregated data may hide, and they inform district actions specific to schools based on a deep understanding of student needs.

DATA PROTOCOLS FOR EQUITY WARRIORS

Equity warriors use data protocols that uncover the assets and challenges facing underserved students that aggregated data may hide, and inform district actions specific to schools based on a deep understanding of student needs.

- **Equity visits:** Focus on a specific equity goal as the problem of practice, using the instructional round structure of problem of practice, observations, and decisions/actions.
- **Root cause analysis:** Engage in inquiry about the underlying causes for performance or achievement and using the analysis to devise responses.
- **Deep data dives:** Explore a question about performance or achievement with a focus on a defined group of students by collecting and analyzing data specific to those students.

YOUR MOVE: INTRODUCE PROTOCOLS FOR EQUITY VISITS TO SCHOOLS.

Equity warriors shine a spotlight on two types of schools: Schools where most students are successful and schools where most students are not. That is to say, all schools should be on district equity warriors' radar.

District leaders tend to give schools where most students are successful a pass because other more pressing challenges need attention or the compliancy and resistance is so strong that it is not worth the effort. At the same time, schools where most students are not successful are treated as though they have few strengths and challenges that are overwhelming. The response is to dump services and resources without regard for how the supports knit together.

Equity warriors know that a successful equity agenda depends on all schools being part of the agenda.

Equity warriors know that a successful equity agenda depends on all schools being part of the agenda. Administrators and teachers know there is no perfect school. Even in schools where 85 percent of the students are proficient, there are underserved students. The voices of these students cannot compete with those of the majority. Are these schools able to marshal their assets to help all students? They should be able to do so.

Not including all schools in a districtwide equity agenda reinforces a deficit message, one that says only troubled schools need worry about equity. Teachers across the system know that no school is perfect, and some teachers are under higher scrutiny. Complaints about fairness mask the underlying concern about lack of appreciation for teaching school-dependent students. Teaching students who have not experienced success in school is different and, in many ways, more difficult. Leaving some schools out of the work creates resentment and limits equity warriors' effectiveness.

Equity visits and root cause analysis are two data-collection protocols that district equity warriors use. These two protocols are appropriate for all schools, although the application is different. We describe each in turn.

Equity visits. Developed by Richard Elmore and his colleagues (City et al., 2009), instructional rounds are based on medical rounds through which physician teams gather evidence and confer on their diagnoses and treatment. Instructional rounds are intended to gather evidence as objectively as possible on a predetermined problem of practice. The key to successful instructional rounds is objectivity. The evidence collected must be observed and the description specific. There is a time for interpretation after the evidence is reported without bias or professional judgment. Providing just the facts creates a level playing field for the team so that everyone can contribute, and agreement on the evidence can precede decisions. Learning to be objective is easier to say than to do, and preparation for objective evidence gathering takes time.

Equity visits are a variation on instructional rounds. Using the instructional round structure of problem of practice, observations, and decisions/actions, district leader equity visits focus on a specific equity goal as the problem of practice. The New Jersey Network of Superintendents developed equity visits during a 10-year journey that started with instructional rounds and morphed into an approach to build and support superintendents in creating an instructionally focused equity agenda for their districts (Roegman et al., 2009). Twenty-five school districts, with student populations of 300 to 30,000, averaging 6,400 students, participated in the network. Over time, the superintendents created problems of practice and look-fors that were specific to instructional improvement and equity. Consider the following example of a problem of practice and its associated look-fors:

Problem of practice: Do we have effective practices to support equity and access to learning goals and increased achievement

of every student? Are our coteaching classes (heterogeneous classes with one special education teacher and one content area teacher) effective?

Look-fors:

- What types of coteaching models are teachers using?
- How are both teachers differentiating instruction for individuals or small groups?
- What does it mean to effectively coinstruct in coteaching classrooms?
- To what extent do both teachers have an established role and contribute to instruction, management, assessments, and planning?
- To what extent do students respect each teacher's role in the classroom? (Roegman et al., 2019, p. 25)

This problem of practice and the associated look-fors are applicable to every school we have visited. Each school has room to grow in creating effective coteaching classrooms. While these questions may be helpful for school leaders to consider, the purpose of the equity visit protocols for district equity warriors to better understand equity and instruction. The authors of *Equity Visits* describe a three-step protocol: identify an equity focus such as the one above, collect and analyze evidence through an equity lens, and reflect on the next steps of district equity-focused work (Roegman et al., 2019).

District leaders, not school leaders, drive each step in the process. Schools are the context in which the evidence is collected that enables district leaders to consider systemic responses. School leaders do not identify the equity focus and do not participate in the visit except to arrange logistics, provide background, and answer questions. The visit is not about one school. Responses to challenges must apply to all schools and every student. Therefore, equity visits are conducted across schools in order to objectively collect data to inform the solution.

Equity warriors who make a genuine commitment to tackling complex equity challenges will not achieve their objective overnight.

The problem-of-practice example above introduces a depth of focus and scrutiny that may make district equity warriors uncomfortable. The journey to developing the focus and scrutiny is important. Although it should not take 10 years, district leaders need to build relational trust, be reflective, be willing to confront their own biases about what is possible, be willing to learn by using multiple data, and be accountable to each other. The benefit of a bold goal is that it is not easily attainable and

blame cannot be laid on one person or one part of the organization. Therefore, engaging district equity warriors in understanding and sharing responsibility for solving an equity challenge is possible. Equity warriors who make a genuine commitment to tackling complex equity challenges will not achieve their objective overnight. They will make progress toward the objective when district and school leaders see that efforts are being made to address the real work.

Root cause analysis. Using an equity-focused problem of practice and conducting equity visits to every school allows equity warriors to pressure all schools to examine their practices. Some schools will not be able to wrestle with the challenge posed by the coteaching problem of practice. There are too many levels of dysfunction. Nevertheless, schools where the majority of students are demonstrating success should be pushed to join in the equity agenda. They, too, have work to do.

Root cause analysis, a process used across industries, is a tool that district equity warriors use with school leadership teams to know their students. The San Diego Unified School District's board of trustees, superintendent Cindy Marten, chief of staff Staci Monreal, and the district leadership team are equity warriors, as the following example shows.

San Diego Unified School District, the second-largest district in California and located just north of the Mexican border, serves 124,000 students, of whom 46 percent are Latinx, 23 percent are white, 8 percent are Black, 9 percent are Asian, 21 percent are English language learners, and 58 percent qualify for free or reduced-price meals. As part of their equity journey, San Diego Unified district leaders required principals to lead their instructional leadership teams in a modified root cause analysis to deepen their schools' understanding of the conditions that contribute to student achievement. Each school team was required to participate in the analysis and prepare an action plan for the year. The action plan was intended to supplement the comprehensive school plan required by the district.

The analysis process included five sets of questions:

- **Data analysis:** What is the current reality around student performance or achievement gaps? What do trend data tell me about student needs at my school?

- **Identify possible root causes:** What are possible root causes of student underperformance or achievement gaps? What observations will I have to conduct?
- **What needs to change:** What must change for students to achieve at higher levels? What is the desired state?
- **Why change:** Why is the change important? Why is this change necessary right now for my students?
- **Call to action and leadership considerations:** How will I shift schoolwide culture, curriculum, and instruction to create the conditions for change?

District leaders provided opportunities for principals to learn the analysis tool and discuss and plan for how they would engage teachers in the analysis. The best situation is when teachers feel ownership for the data and selected solutions. Teacher involvement in the analysis is critical since teachers' beliefs affect student learning. To move beyond the preliminary and often superficial review of performance data—particularly for schools at the extremes of student performance—teachers need to be honest in answering questions about the possible root causes. To do so requires that there exists a trusting relationship among teachers and administrators and a willingness to honestly share their beliefs.

Root cause analysis was stronger when external facilitators participated. Even when trust is not an issue, teachers with strong opinions tend to overpower and fill the space vacated by teachers who are reluctant to share because they are uncertain or worry how their opinions will be received. External facilitators who are trusted or come at the request of the team help by enforcing norms and asking questions to push conversations deeper.

Some principals took ownership of the data and root cause analysis steps. They presented their analysis to the team, asked for their acknowledgment, and then proceeded to engage the team in discussions about what needs to change and, most important, why it needs to change now. Here is the opportunity for the school's leadership team to create a compelling narrative about its equity agenda. We will say more about this critical step in the next chapter.

Principals presented and discussed their plans with their area superintendent. The discussions provided opportunities to challenge assumptions and examine alignment between root causes and the changes proposed to address the causes. They also

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provided opportunities for school and district leaders to strategize and work collaboratively on ways to address the causes. For example, if a probable root cause was high student mobility, could the school identify mobility patterns? If so, could the district develop systems to improve how student information was shared and align curriculum so that students would recognize the content they are expected to learn? It was rare that conversations led to more complex strategies. More often, discussions were about support that district leaders could offer schools.

One of the key outcomes from the process came from the school leaders' answers to the call-to-action question. The response to the question helps district leaders assess whether school leaders are equity warriors. The expectation is that the analysis and examination would lead to specific steps that would improve student learning. If school leaders were not passionate about the steps, they probably were not ready to do the hard work required to make it happen. It would be incumbent on the district equity warriors to have difficult conversations.

Equity visits and root cause analysis are two tools that can engage all schools in a district in collecting and analyzing data that are at the core of knowing students well. When equity warriors apply these tools, people can become uncomfortable. These protocols ask hard questions, and they are intended to uncover real challenges and to assess which leaders are ready to advance the equity agenda. The third tool is doing a deep data dive with a specific focus.

YOUR MOVE: DO DEEP DATA DIVES AND PUT THE FACE OF STUDENTS ON SYSTEMIC PROBLEMS.

Equity warriors make the equity agenda personal and hard to ignore by discussing the experiences of individual students.

Equity warriors make the equity agenda personal and hard to ignore by discussing the experiences of individual students. Putting a name and face to data that reveal the system's failures to educate students to high expectations yields powerful results. Equity warriors use protocols for deep data dives that can spotlight student experiences and generate momentum around systemic actions. We have partnered with districts that do deep data dives to understand the experiences of specific groups, such as Black male or Latinx students. The learning from these protocols helps us understand some of the

underlying institutional barriers that result in persistent underperformance of group members. Deep dives allow equity warriors to become more specific in identifying where actions to address the barriers have been successful and where they were not, and they provide direction for powerful conversations to hold leaders accountable for their actions.

For example, in our work with partner districts, we have often been remiss in not taking on the challenge of looking at special education. We have many excuses for doing so. Federal and state laws and regulations and court decisions fill volumes. No other part of the education system is as highly regulated, monitored, and prescriptive. District leaders responsible for the special education system are well steeped in the system and have specific knowledge about the laws and parameters within which they operate. Reciprocal actions to inquiries into practices, protocols, actions, or costs include citing regulations, calling in state and federal offices and advocates, and threatening court action. Those outside the special education system tend to stay away. As a result, students with disabilities become someone else's responsibility.

Yet, a deep data dive into the special education system often shows a disturbing reality. Our first experience with this was when a high school literacy coach explored the background of Black and Latinx students who were reading below grade level and had been receiving special education services since the primary grades. Her dive into the students' individualized education programs (IEPs) showed that services were inconsistent, and there was no continuum of support from year to year. Students received services every year, with no evidence that any service was improving their reading levels.

Equity warriors struggle with knowing where to begin to address the disturbing reality within their equity agenda. There is so much work to be done for the 85 percent of students who are not identified as students with disabilities. We educators justify our limited ability to address the needs of students who are the most vulnerable among us by tinkering at the edges. We try to improve support for teachers and help them develop the skills and temperament for dealing with student behaviors in classrooms with too many students. We try to integrate students with disabilities into classrooms with general education teachers and students. We try to forge closer cooperation and collaboration among central teaching and learning and special education staffs. We try to convince state and federal regulators not to impose well-intended regulations that do not fit the reality of our student and teacher populations. While we tinker,

students are lost. A good friend continually cites an African proverb: When the elephants fight, the ants suffer.

There is no easy or good solution to the challenges of our special education system. There are thousands of smart, passionate, committed people far more knowledgeable than we who are working on the system. They haven't been able to build an equitable system for all. To use another pachyderm analogy, the way to eat the elephant is by taking one bite at a time. The bite is that equity warriors can begin by doing all that is possible to ensure that the only students who enter into the special education system are the ones who truly need the services.

One district took a bite of the elephant in this way.

Taking a data dive into its special education system was the topic for the district leadership team retreat. Present at the retreat was a team of 10, the superintendent's cabinet that included the executive directors who supervised schools. The special education division director decided to start the conversation about needed improvement by reviewing some existing IEPs. To prepare, she reviewed 50 randomly selected IEPs and chose a few that would help make her point. She was stunned and disappointed that many of the IEPs, selected at random, would have been suitable. She reached into the pile, selected two, and asked staff to redact information that would identify the schools or students.

The special education director introduced the session, told staff the two IEPs had been selected at random, and asked cabinet members to read the information and offer their opinions on whether the placement and services matched the needs of the students. The members silently read the assessment data and the evaluation team's determination. The first student was a 2nd-grade Black girl. Her reading level was at the low end for 2nd grade, but she was on grade level in mathematics. She was referred for evaluation because she was not fully engaging in lessons, and her teacher wondered if she had developmental issues. The assessment showed that her single mother had moved residences twice in two years, which necessitated a school change each time. There were no signs of developmental delay. Nevertheless, the evaluation team recommended and her mother approved supplemental services that would pull the girl from her teacher and classmates for an hour each day. The second IEP described a similar situation.

The discussion that followed was filled with passion. There was consensus, based on the IEP data, that the 2nd-grade student was doing well, particularly for one who had changed schools twice. The data indicated that she could learn, especially given that she was able to remain at grade level when changing schools and potentially reading and mathematics programs. But pulling her from time with her peers would further isolate her and possibly hinder her learning of the core curriculum. So, what was the rationale for the supplemental services? Since we did not know the school, we could only speculate. Lack of knowledge, neglect, overprotection, good intentions, or bad intentions were raised as possibilities. One thing was clear: The school administrator's signature was needed to move the recommendation. Targeting the principal emerged as a districtwide approach.

The cabinet members repeated the exercise using the same IEPs with the district leadership and reached the same conclusions. The next step was a districtwide professional development session with principals. The principals' reactions to the exercise surfaced systemic issues that prevented them from making decisions that were in the best interest of students. Unfortunately, although district leaders stressed an objective review of the data and the importance of honest conversation, there was too much blaming and shaming by principals about the faults in the system.

At the core of the discussion is that principals want to support all students. Providing extra supports to teachers whose class sizes are too large and whose students are school dependent is one way to help. Cuts in administrative staff mean special education teachers are conducting IEP evaluations. Teachers are unable to push back on teachers and families who demand supports. Administrators are doing the best they can.

Putting the face of students on systemic problems is a form of warfare. Similar processes can analyze data from any student group. Using data in this way can motivate individuals to take steps to improve opportunities for student success. It can also open a can of worms. Equity warriors increase their chances of success by having clear expectations for the next steps once awareness is created. Surfacing a problem without addressing it can do more harm. There needs to be an exit strategy.

Putting the face of students on systemic problems is a form of warfare.

REFLECTION: *Which data are the most powerful in creating a sense of urgency about equity? What protocols will you use to engage external and internal audiences to see the real story? What reciprocal actions do you expect?*