Benchmarking Analysis – District Equity Document Development

November 2018

HANOVER RESEARCH

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PROJECT OBJECTIVE

A midsized northwestern school district is interested in further exploring **how districts develop foundational documents** – including statements, policies, and mission statements – **to guide equity work,** including **the role of community feedback** during the development process.

✓ How do districts **develop equity statements, policies, and other documents?**

✓ How do development processes **vary for each equity document type?**

✓ How do districts **incorporate community feedback** when developing equity documents?

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METHODOLOGY

Hanover Research (Hanover) conducted **seven in-depth interviews** with equity leaders at districts and other education organizations across the country, with a **focus on the northwestern United States**.

Hanover began email outreach in September 2018. Interviews were conducted from September 25th through October 3rd.

Note:

Qualitative research is exploratory and designed to add insight and a depth of understanding to a particular question or topic. Qualitative findings provide commonalities and trends but are not intended to be statistically significant or to provide generalizable conclusions.

RECOMMENDATIONS

Based on findings from these interviews, Hanover recommends that districts:

1 **Clearly determine the "why" for equity at the district, establishing a common purpose and language for equity work.** Let this objective anchor the challenging design and implementation processes, as well as guide communication with stakeholders.

2 **Ensure that committees leading equity document design are inclusive of all stakeholder groups**, especially those from marginalized groups. A committee may first develop the district's equity *statement* or *mission* and then continue to develop a more detailed equity *policy*.

3 **Plan for the development of a comprehensive equity policy or similar document to occur over a year or longer**. An extended period promotes stakeholder inclusion and buy-in.

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KEY FINDINGS

Participants described the development of a diverse set of equity-focused documents to guide and advance their districts' commitments' to educational equity. These documents include equity-specific policies, frameworks, plans, missions, lenses, stances, inventories, and toolkits. Notably, multiple participants described the intersection of these documents with their districts' broader strategic plans. Participants broadly described similar processes for developing comprehensive equity-focused documents of various types.

To compose equity policies, plans, frameworks, and other comprehensive equity-focused documents…

1. **District leaders firmly and publicly establish equity as a priority.** Leaders typically establish the "why" for equity at their district and appoint a dedicated equity leader.
2. **District leaders convene an inclusive group of stakeholders** to form a design committee.
3. **This committee researches other districts' equity documents**, selecting the components of these that best serve their district's philosophy. The committee modifies and expands upon these components according to their district's specific equity goals, needs, and values.
4. **Leaders turn next to community engagement**, for example, by engaging staff via thoughtful and well-supported professional development, as well as anticipating and taking proactive steps to mitigate resistance from other stakeholders. District leaders should ensure that community stakeholders understand the district's definition of and focus for equity, as well as communicate regularly and transparently around equity-focused initiatives.

Committees responsible for designing equity documents typically include a diverse cross section of teachers and staff, administrators, parents, and students, as well as other community members. However, committee composition varies greatly, according to the individual needs and priorities of the district. Empowering marginalized stakeholders through membership on the committee improves the viability of the equity document. As one participant explained, "To strengthen the voice of those who are impacted most [is to] strengthen the policy."

Participants emphasize that a thorough design process demands a great deal of time, often 12 to 18 months. This time investment promotes a thoughtful and equitable design process and helps ensure that the final document reflects the input and needs of the full community.

KEY FINDINGS: A FOUR-STEP DESIGN PROCESS

FOUNDATIONAL WORK:
Executive district leaders **firmly and publicly establish equity as a priority:**
- ✓ Convey the "why" for equity at their district, grounded in a common purpose and language.
- ✓ Appoint a dedicated equity leader

(Slides 15-16)

COMMITTEE FORMATION:
Executive district leaders convene an **inclusive committee of stakeholders**:
- ✓ Principals, teachers, & staff
- ✓ Parents
- ✓ Students
- ✓ Community members

(Slides 17-18)

COMMUNITY ENGAGEMENT:
- ✓ Anticipate and mitigate resistance from other stakeholders.
- ✓ Engage staff via thoughtful and well-supported professional development.

(Slides 22-24)

COMMITTEE WORK:
The committee **researches** peer districts' equity documents, selecting components that best fit their community's equity goals, context, and needs.
(Slides 19-20)

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CASE PROFILES:
EQUITY DOCUMENTS

CASE PROFILES: OVERVIEW

Several interviewed districts described developing a series of documents – including plans, policies, and frameworks – to guide and advance their work around educational equity. For example…

Anonymous District in Washington.................Slide 10

- Strategic Plan
- Equity Policy
- Equity Framework
- Equity Toolkit
- Equity Inventory

Anonymous District in Washington.................Slide 11

- Race & Equity Committee Mission
- Race & Equity Policy
- Race & Equity Advisory Team Mission
- Race & Equity Action Plan
- Central Office Equity Team Mission

Anonymous District in Oregon.............................Slide 12

- Strategic Plan
- Strategic Direction
- Equity Policy
- Equity Lens
- Equity Stance

CASE PROFILE:
ANONYMOUS DISTRICT IN WASHINGTON

STRATEGIC PLAN
- Developed by the district's new superintendent.
- Equity priorities are embedded throughout.

> "Our [equity] policy and our strategic plan (…) **work very well together.** "

EQUITY POLICY
- Developed over 12 months by an inclusive district committee of stakeholders. Ratified by the board.

EQUITY FRAMEWORK
- Merges the Equity Policy and Strategic Plan, with an emphasis on consistent language and actionability for professional development.
- Comprises four domains:
  - **Governance, Ordinance & Policy**
  - Climate & Culture
  - Teaching & Learning
  - Family & Community Engagement

> "You **don't want to (…) change the language too much** (…) in education. It confuses people. So by combining the [equity] policy (…) and the strategic plan into the framework, **they've seen this language over and over again.**"
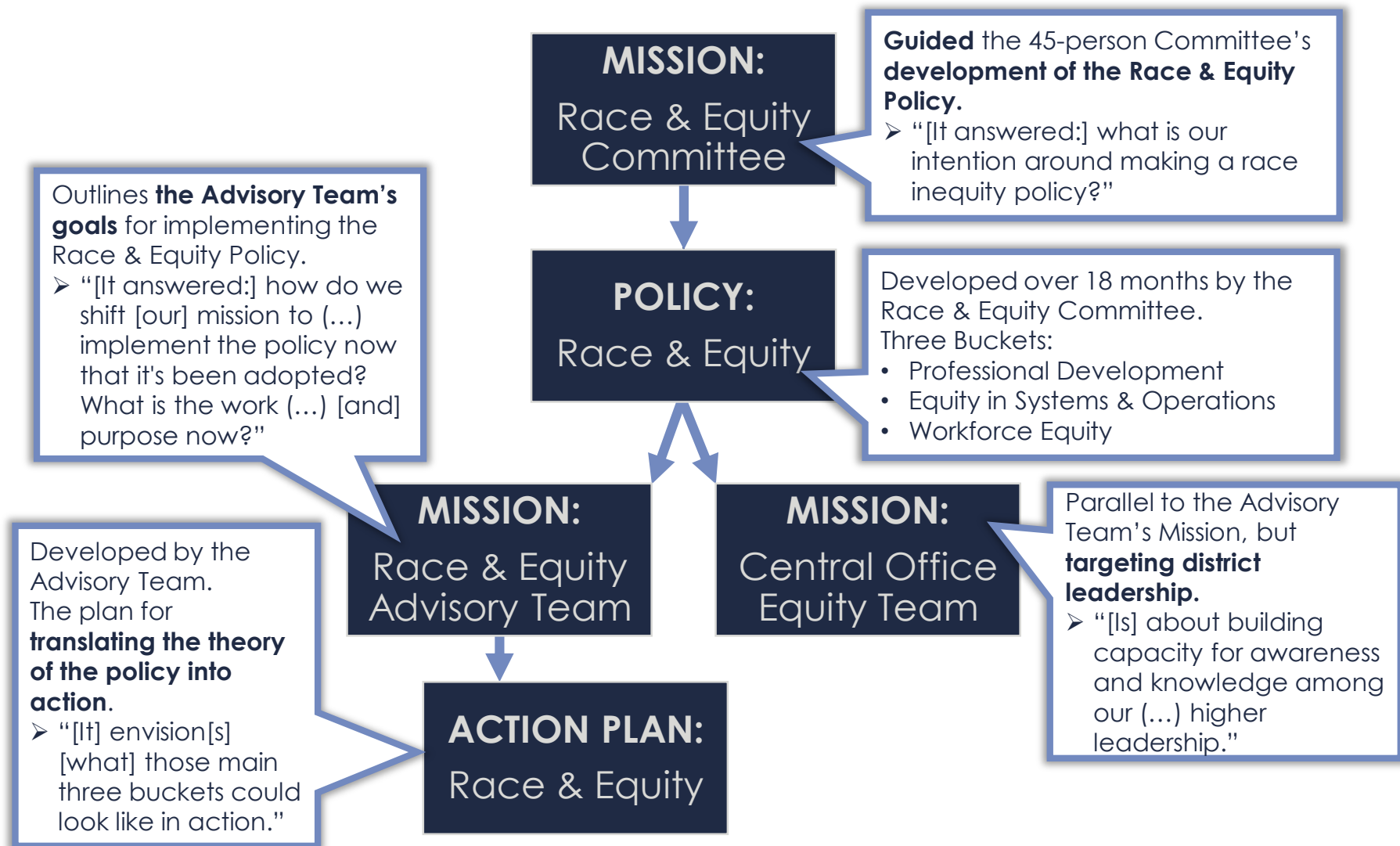
EQUITY TOOLKIT
- Serves as a blueprint for additional policy creation, to ensure the district's policy development process, as well as the effects of these policies, are equitable - an "equity lens."

> "We're starting with the very basic one first, which is **governance, ordinance, and policy.** Examining those barriers that get in the way of kids learning or kids participating in certain events."

EQUITY INVENTORY
- A recent addition, this document outlines equity priorities for each buildings' equity team.

MISSION:
Race & Equity Committee

Guided the 45-person Committee's **development of the Race & Equity Policy.**
➢ "[It answered:] what is our intention around making a race inequity policy?"

POLICY:
Race & Equity

Developed over 18 months by the Race & Equity Committee.
Three Buckets:
• Professional Development
• Equity in Systems & Operations
• Workforce Equity

Outlines **the Advisory Team's goals** for implementing the Race & Equity Policy.
➢ "[It answered:] how do we shift [our] mission to (…) implement the policy now that it's been adopted? What is the work (…) [and] purpose now?"

MISSION:
Race & Equity Advisory Team

MISSION:
Central Office Equity Team

Parallel to the Advisory Team's Mission, but **targeting district leadership.**
➢ "[Is] about building capacity for awareness and knowledge among our (…) higher leadership."

Developed by the Advisory Team.
The plan for **translating the theory of the policy into action.**
➢ "[It] envision[s] [what] those main three buckets could look like in action."

ACTION PLAN:
Race & Equity

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CASE PROFILE: ANONYMOUS DISTRICT IN OREGON

Outlines superintendent's priorities.
Contains equity-specific goals:
- ✓ Equity professional development
- ✓ Equity response protocol
- ✓ Student voice
- ✓ Gender equity
- ✓ Culturally responsive hiring practices

STRATEGIC PLAN

STRATEGIC DIRECTION

Accompanies the strategic plan and appears in the equity policy.
- ➤ "Foundational belief statement. (…) it [outlines] **why one of our founding beliefs is in our commitment to equity**."

A board- and community-created document, developed over 18 months.
- ➤ "[It] is a flagship, '**Why**?' for our district. This is why **we behave this way**, (…) why **we make decisions** this way, (…) why **we talk about equity** this way."

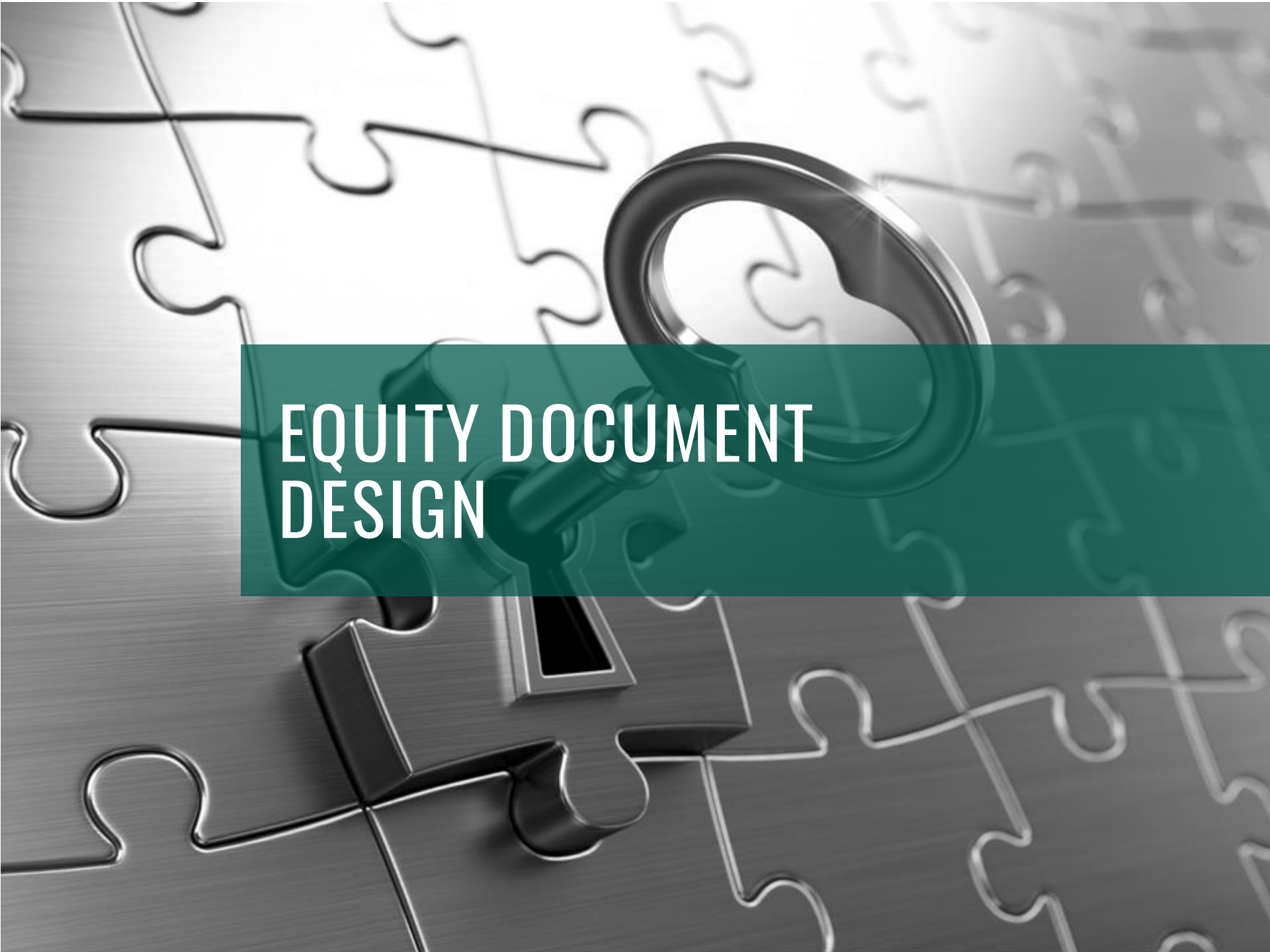## EQUITY POLICY

EQUITY STANCE

EQUITY LENS

Set of **guiding questions** for district leaders, principals, and teacher leaders.
- ➤ "To help screen for [hidden] systems of oppression, uncover bias, (…) [and to] articulate their rationale."

Eight bullet points that **encompass all equity documents.**
- ➤ "One stance that [says], "This is us. This is our hallmark. These are our core founding principles inside of equity that we carry with us to the work that we do.""

EQUITY DOCUMENT DESIGN

"

[One] person is sitting in a room trying to craft a policy by themselves - [this is] not (…) an equitable practice. (…) It's really important to have lots (…) of different examples of (…) polic[ies] (…) but not to copy a policy. It really **has to be customized for your own community**. (…) **That tak[es] time (…) [and] intentional[ity]** [regarding]the people [who] inform your policy (…)[so] that your policy is **something that the community can own.**

— Director of Equity and Family Engagement,
WA District

FOUNDATIONAL WORK: LEADERSHIP

The viability of equity document development requires strong and unwavering "top-down" executive support from board members and the superintendent.

> " [Our new superintendent] came in with an equity focus. (…) **Her entire strategic plan, is based on equity work.** (…) she was great as far as getting out there and **communicating with many stakeholders about [her equity goals].** (…) And the school board has bought in. "
> *- Anonymous*

> " It has to be from the top down. Your superintendent really has to be on board with it happening. "
> *– Leader, WA District*

Participants outline several key equity-focused responsibilities of executive leaders:

1. **Drive far-reaching systemic change.**

> You have to align all of the other policies to the equity policy. **It needs to be *the policy*. It cannot be one of many policies. (…)** You're going to need **strong conviction to really shift this practice**. You're going to need a different skill set (…) because **this is hard work. There is nothing romantic about [it]**.
> *– Leader, Anonymous District in Washington (WA District)*

2. Appoint and empower a dedicated equity leader.

> " If we are serious [about equity], I can't do those other things. The superintendent (…) agreed to have me **just focus on equity and diversity this year.** "
> – *Anonymous*

> " After a year-long inquiry, (…) a recommendation from a nearby educational service district (…)[was to **hire] a person to lead the equity work in this district.** "
> – *Leader, WA District*

3. Establish the "why" for equity at the district, grounded in a common purpose and language.

> " It starts with the 'why.' **Why [does] the district wants to develop an equity policy** in the first place, right? If you don't have a clear, compelling why (…), **it's just wasting people's time.** "
> – *Leader, WA District*

> " [You must] **re-calibrate the collective understanding of 'racial equity,'** so that way they can speak the same dialect. (…) It will minimize (…) confusion. (…) [Being] **anchored in that shared purpose is going to be critical.** "
> – *Leader, WA District*

> " **Be really clear about what your purpose is** (…) whatever language you use for your policy, be really clear about it from the beginning because **it's really hard to go back and backtrack from that.** "
> – *Leader, WA District*

COMMITTEE FORMATION:
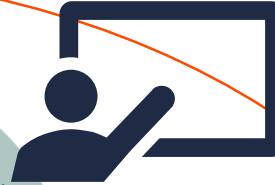# WHO SITS ON THE DESIGN COMMITTEE?

②

EQUITY LEADERS

Facilitate meetings. (Other district leaders and board members have final approval)

CAMPUS-LEVEL REPRESENTATIVES

Principals and key teachers and staff

" [The] Equity Diversity Committee (…) was composed of **parents**, **students**, **administrators**, **teachers…** just across the board. And the **mayor** [and] one of our **police chiefs**. (…) The equity policy (…) came out of that committee. "
– Anonymous

" All levels, from **teachers** to **counselors** to **principals** to **central office staff**, and there are **community partners** and there are **families**, especially [those] who are **most impacted by racial inequities**. "
– *Leader, WA District*

" Networking and [those who] reached out. We didn't really do any kind of formalized call. (…) [Eventually] we added in **student** voice[s] and (…) **parents** and a couple of **classified staff** and some **certificated staff**. "
– *Leader, WA District*

" Community meetings involved a diverse cross-section of our community and our (…) **staff – classified**, **certified administrative –** in helping create a document. "
– *Leader, OR District*

OTHER STAKEHOLDERS

Including elected officials, police chiefs, and community partners.

STUDENTS AND PARENTS

Especially from marginalized groups.

Composition of this committee varies greatly, according to the individual needs and priorities of the district.

For example, some districts opt for a minimal role for district leaders:

"We don't have any kind of central administrators (…) because **we wanted [to prioritize] community members' [voices].**"
– Leader, WA District

Empowering stakeholders in this way improves the viability of equity-focused policies:

If (…) you [don't] have the right voices [creating] this policy (…) then **the policy's just going to collect dust** on a shelf. **To strengthen the voice of those who are impacted most, (…) [is to] strengthen the policy.**
– Leader, WA District

"I wasn't part of it (…) beyond facilitating the process. (…) It wasn't something that came from me by itself. **So the ownership didn't belong just with me.**"
– Leader, WA District

Several participants note that a group can become too large to function efficiently, necessitating a smaller committee to execute the vision of the larger group.

"We weren't all 27 co-creators for the single document."
– Leader, OR District

"**We decided to make that group a lot smaller** (…) because it's a lot of people (…) We prioritized community members and had a few staff people as part of that group."
– Leader, WA District

COMMITTEE WORK: RESEARCH AND DESIGN

Committees typically scan other districts' equity documents and select language and/or objectives that best fit the particular context, values, and goals of their community.

> " We did a search of educational equity policies from K-12 districts around our region and country. (…) and we said, **'All right. What do we see in these that we resonate with?'**
> *-– Leader, OR District*

> " [We] **brought in different districts** around the country that had created their own race and equity policies. (…) It really helped **inform the work that we were doing.**
> *-– Leader, WA District*

> " [Our committee] developed our policy, (…) around (…) **[our] district [needs],** (…) [and] based on what we learned from Minnesota [and] Portland's [policies]. (…) **It was merging our policy from examples that we had seen.**
> *- Anonymous*

> Even though they speak to similar issues in terms of addressing our inequities within our systems. (…) **Every district['s] (…) policy looks different. (…) because it's [determined] by the community.**
> *– Leader, WA District*

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COMMITTEE WORK: THE DESIGN PROCESS TAKES TIME

Participants emphasize that a thorough design process demands a great deal of time (e.g., 12 to 18 months).

This investment ensures the document is designed thoughtfully, smoothly, and with equitable participation from a variety of community members.

The process typically takes **about 12 months.** (...) [You shouldn't] try and be efficient and do it in two, three, four months. It doesn't work that way. **It is a collective process that will take time.**
– Leader, WA District

" I really liked how the process went. (...) It was slow, **intentionally slow.** [So] when we got to: (...) "Do we all [agree about this?]," It wasn't a whole lot of [further] conversation. **Everyone [got] to contribute so it felt very equitable.** "
– Leader, WA District

" We worked (...) over a period of **a year and a half** (...) to create that policy. "
– Leader, OR District

" Honestly, a framework does take **about a year**. "
– Anonymous

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STAKEHOLDER ENGAGEMENT

COMMUNITY ENGAGEMENT: FOSTERING BUY-IN

Interviewed equity leaders anticipated some degree of resistance, confusion, and/or hesitance from community members regarding the new equity policies.

However, the degree of actual occurrence varied from district to district. Notably, resistance to new policies typically involved racial dynamics.

➢ Some districts did not experience push-back…

> "We didn't. And that's been interesting because the district I work in is predominantly white."
> – Anonymous

➢ While others did...

> "The biggest area of misunderstanding (…) that we have is people (…) often times **conflate equality with equity.** That's a very common thing."
> – Leader, OR District

> "One of the primary challenges is ultimately pushback: (…) **people don't see the importance of ensuring [equity].**"
> -- Anonymous

> "There was pushback [as to] **why we're focusing on just race**."
> – Leader, WA District

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COMMUNITY ENGAGEMENT: FOSTERING BUY-IN

Leaders expressed concern regarding resistance of this type. However, they note several **strategies for *remedying or*, better yet, *avoiding* resistance altogether**.

Leadership and Policy Clarity

- "[Buy-in] is why [our policy] is **really clear about resource allocations** too, because [equity] does mean that people need different things."
  – *Leader, OR District*

- "The (…) superintendent, (…) **was very clear on her [equity] goals** (…) [for] the district. And she (…) **communicat[ed] with many stakeholders** about that."
  – *Anonymous*

Focus on Student Achievement and Well-being

- "We haven't had anyone say, 'No. I believe there should be disproportionate outcomes.'"
  – *Leader, OR District*

- "[It's] important to **talk about why that and why here and (…) if in our data,** if race really was the number one predictor around student success."
  – *Leader, WA District*

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COMMUNITY ENGAGEMENT: PROFESSIONAL DEVELOPMENT

Interviewed leaders emphasize that a crucial step in actualizing the goals of an equity policy is engaging staff – teachers, principals, and others – through thoughtful and well-supported professional development (PD).

" Your biggest gap of all is your **value gap**. 'These [are our] values, then these are the **steps, trainings, learning or un-learning that needs to take place for you to walk and live [out] your values**. "
– Leader, WA District

" **Expectation without support is a recipe for failure.** So (…) We come alongside our staff and say, 'We're going to support you in this [PD] training in that the district pays for [it] and we make time for it on your calendar. And it's an expectation.' "
– Leader, OR District

" Build the **capacity for awareness and knowledge** among (…) higher leadership. "
– Leader, WA District

One participant, a leader in equity-related professional development, recommends that trainings be …

Ongoing & Differentiated.

It's not just this one-time training, but just there's a lot of different layers for all of the educators' (…) different contexts, [and] stages of development.
– Leader, WA District

Embedded.

Our team does a lot of professional learning sessions and coaching with all of our educators and our main key educators in Washington state.
– Leader, WA District

PARTICIPANT RECOMMENDATIONS

PARTICIPANT RECOMMENDATIONS: OVERVIEW

When asked what their advice is related to the development and implementation of equity-focused documents and policies, interviewed leaders recommended that the district:

Implement equity policies and initiatives with boldness and determination;

Use data to monitor equity needs and progress towards goals; and

Communicate regularly with the community and learn from other districts.

PARTICIPANT RECOMMENDATIONS: DESIGN AND IMPLEMENTATION

"BE BOLD"

- Leaders note that **equity documents are just words, unless they are met with a deliberate approach to implementation**, including accountability and commitment to change.

> Crafting an equity policy is just the easy part. **The implementation is the harder part.** That's where the rubber meets the road. **That's where most districts (…) feel the pain, the conflict, the heat** (…) because you're asking people to change.
> *– Leader, WA District*

> **Be bold.** Truly state who you are and what you believe in. (…) State [the goals] and then design your path. (…) **You [will likely] go against the traditional values of dominant culture** that keep things copacetic. (…) We're **giving advocacy and agency to students who need voice**.
> *– Leader, OR District*

> We can talk about equity all day, [but] we're not necessarily doing anything about it. (…) **Make these (…) living, breathing documents and policies** that (…) actually **hold people accountable to (…) moving the work**.
> *– Anonymous*

PARTICIPANT RECOMMENDATIONS: DESIGN AND IMPLEMENTATION

USE DATA TO DRIVE YOUR PROGRESS

- These leaders encourage other equity leaders to rely heavily on data in order to monitor their district's equity needs and progress towards their equity goals.

" It has to be **data-informed** and looking at all the **different kind of inequities** that are within our system. "
– Leader, WA District

" If you don't have true **data targets** to [track progress] (…) moving forward, then you're not really (…) mov[ing] the system in a way that's more equitable. "
– Anonymous

PARTICIPANT RECOMMENDATIONS: DESIGN AND IMPLEMENTATION

OTHER RECOMMENDATIONS

- One participant in particular has several key pieces of advice...

" **Networ[k] with surrounding districts and other equity folks** around ways to compare information and support each other and collaborate. "
– Leader, WA District

" **Updates to the community around the [design] progress** (…) awareness [leading up to] approv[al]. (…) Transparency, or more communication, outreach. "
– Leader, WA District

" Do you also have **white accomplices around [leaders of color] to help support the message?** So it doesn't become lost in another race conversation (…) especially (…) [when] you're trying to implement. "
– Leader, WA District

APPENDIX

PARTICIPANTS

Organization	State	Title	Document Type(s)
Anonymous District*	--	Equity Leader	N/A
Anonymous District	--	--	• Non-discrimination statement
Anonymous District	WA	Director of Equity	• Strategic Plan • Equity Policy • Equity Framework • Equity Toolkit • Equity Inventory
Anonymous District	WA	Director of Equity and Family Engagement	• Race & Equity Committee Mission • Race & Equity Policy • Race & Equity Advisory Team Mission • Race & Equity Action Plan • Central Office Equity Team Mission
Anonymous State Board of Education	--	Executive Director	N/A
Anonymous District	OR	Executive Director of Equity and Instructional Services	• Strategic Plan • Strategic Direction • Equity Policy • Equity Lens • Equity Stance
Anonymous District	WA	Equity in Education Director	N/A

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*This participant is now engaged in equity-related work at a university but formerly worked in a school district and drew upon this experience during the interview.

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