Education Elements

FORGE A PATH FORWARD

PART I:
HOW TO DESIGN A RESPONSIVE RETURN PLAN

PART II:
BOLDLY REIMAGINING WHAT IS POSSIBLE

PART III:
STEPS TO REDESIGN SCHOOL-LEVEL SYSTEMS FOR EQUITY

How to Design a Responsive Return Plan

Education Elements

RETURNING REIMAGINING REVAMPING

> "In preparing for battle, I have always found that plans are useless, but planning is indispensable."
>
> President Dwight D. Eisenhower

In a time of unprecedented change when conditions are ever-evolving and ambiguous, responsiveness doesn't just become more important; it becomes THE strategy for organizations to endure and thrive. Districts, schools, and education agencies will need to consider three concurrent streams of work (adapted from McKinsey's Path to the Next Normal) as they plan for School Year 2020-2021:

RETURNING: Determine multiple paths for a return in SY 2020-2021, with the expressed intent to address the needs of all students.

REIMAGINING: Rethink the way learning and teaching are designed so that the entire district community can thrive.

REVAMPING: Build agile and responsive practices to support all students and families in a time of crisis.

| STEP 1	STEP 2	STEP 3	STEP 4
IDENTIFY KNOWNS AND UNKNOWNS	BUILD SCENARIOS	RECOGNIZE CONSISTENCIES AND PRIORITIZE	COMMUNICATE

This guide presents the Education Elements philosophy on how to use responsive practices to plan your district's return and provides a four-step process for examining multiple return scenarios given considerable uncertainty and unknowns.

What We Learned

Through the pandemic, we learned more about digital transformation in learning in a matter of weeks than we had over the last 10 years. The focus of many education organizations was rapid transformation. Education leaders grappled with how quickly in-school operations could be shifted to at-home or distance learning. In most cases, district leaders' goals were not to augment or transform teaching, but rather to change the method of delivery to virtual. Leaders tried new paths to personalize support for students and families who relied on buildings, programs, and most importantly, staff to access learning.

Most cycles of crisis management start with short-term responses and migrate to longer-term planning. In the first weeks of responding to the impacts of COVID-19, most leaders were focused on meeting immediate needs: device distribution, meal delivery, and regular communication. With return planning primed to begin, leaders are now able to take the time and space to re-imagine operations and rethink the status quo. The closures and disruptions caused by COVID-19 have underscored that equity is not something to be addressed "at some point." Ensuring that all students have the support they need to be successful is the most important thing we can do now. Addressing issues of equity requires **structural changes to the way we teach, learn, grade, train teachers, engage with families, etc.** Changes that are opportunities for SY 20-21.
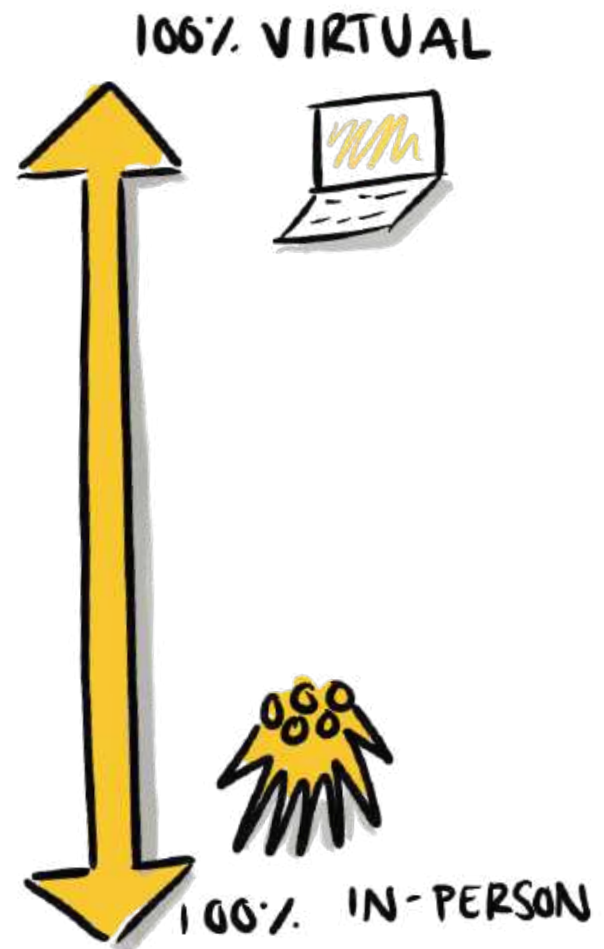
What We Know

Based on the requirements shared at the federal, state, and local levels, districts and schools may be asked to rethink everything from physical space to learning structures. The table below displays examples of how districts might employ different strategies and tactics to safeguard the health and wellness of their communities.

SAMPLE LEVER	EXAMPLE TACTICS TO ACCOMMODATE	
Limit Contact (Students + Teachers)	• Reduce class sizes • Adjust lunch protocols • Stagger start and end times of the day • Stagger days of attendance	• Intermittent closings • Eliminate assemblies • Eliminate sports • Limit or eliminate bus services
Extend Learning Options	• Summer extensions • Learning day extensions • Weekend options • Remote learning options • Trimester or year-round scheduling	
Enforce Safety Precautions	• Protective equipment (e.g. masks, gloves) • Temperature checks • Hand-washing • Frequent sanitization + cleaning • Limits on attendees at family events	
Individualized Student Supports	• In school mental health and trauma support • Significant remediation • Wraparound services	

Many of the tactics suggested are short-term solutions; they are adaptations for a traditionally inflexible education system. Our perspective is that districts and schools must choose tactics to meet your community's health and safety requirements; what works for one district may not work for another.

Schools will reopen, and there is no option to return to "business as normal." Our communities have faced unprecedented trauma resulting from direct impact, loss, and economic instability resulting from COVID-19. We know that the inequities that already existed in schools have been given a national spotlight. The long-term response to and return from this crisis will demand something new from leaders to meet this challenge.

What Is Possible

We have always believed that the first step to building a school or district strategic plan that uplifts all students is to understand that at their core, school districts have historically been designed to uplift some, not all. Grounding ourselves in this painful, if not common, reality allows us to build plans that change the narrative around universal student achievement, and design new systems aimed at creating opportunities for achievement for all. Only then can we ensure students attend schools that can meet their needs and potential.

Through this crisis, we have witnessed school districts, teachers, and students rapidly adapt to change. Barriers that prevented innovation such as testing, scheduling, and even physical environments have been suspended, and in their place comes possibility. We can make the choice to bring these learnings and experiences with us as we return to school. This time period is an opportunity to actively choose what you return to and what you will change.

KEY PERSPECTIVE

Our work is grounded in providing personalized learning for all. To that end, we are defining key terms to clarify our perspective.

EDUCATIONAL EQUITY:
Providing the necessary opportunities to all by ensuring that each student has the right resources to reach their individual potential.

PERSONALIZED LEARNING:
Personalized learning calls on educators to "[tailor] learning for each student's strengths, needs and interests–including enabling student voice and choice in what, how, when and where they learn–to provide flexibility and supports to ensure mastery of the highest standards possible." (Aurora Institute). At its core, personalized learning centers around the learner; ensuring lessons are relevant, accessible, and ultimately build student ownership. Education Elements published "The Core 4 Elements of Personalized Learning" to name the most common instructional changes that teachers and teams implement when they personalize learning for students.

In our work, we have seen the value of responsive leadership and structures that uphold the needs of all. Responsiveness in teaming, planning, decision-making, and communication serve as guidelines for creating more agile and fluid organizations, and we see examples of this with districts that have adopted their own responsive practices through our partnership. Our Annual Report highlights the experiences and resulting outcomes of schools, districts, and states as they incorporated responsive principles into their everyday operations.

WHAT IS RESPONSIVE PLANNING?

At Education Elements, we believe the school districts and organizations that thrive year to year treat planning as a process that is more valuable than the plan itself. WHO you engage and HOW you engage people says more about your values than your plan ever will. Therefore, your plan should reflect a clear purpose, direction, and strategy while also creating opportunities for feedback and pivots.
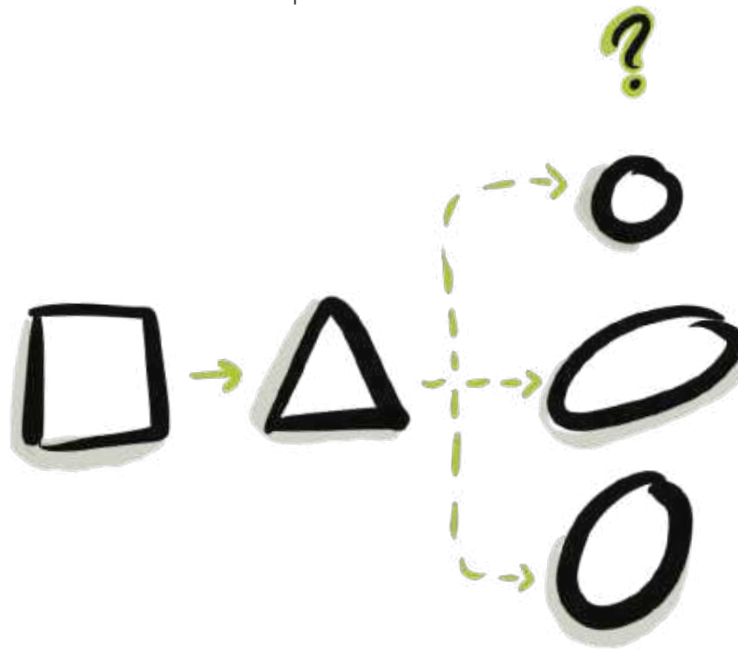
According to Eric Ries, entrepreneur and author of The Lean Startup, a 'pivot' is a change in strategy without a change in direction. Companies and organizations that endure and succeed through significant change are those that adapt accordingly without losing their north star or core mission and beliefs. A case we use to illustrate this is that of the Netflix and Blockbuster business models of the early 2000s. While Blockbuster held the market for at-home movie rentals, Netflix began to test out different models that aligned to the same vision of providing convenient, home entertainment—first with mailing DVDs in the late 1990s, and as the needs of their consumers changed, with on-demand streaming by 2007. The pivots Netflix tested and implemented led to their success and Blockbuster's fall, but they also give us a valuable lesson in responsive planning. The organizations that succeed are the ones willing to plan for change and pivot as external conditions shift without losing their overall strategic direction. In the bestselling book, *The New School Rules*, by Anthony Kim and Alexis Gonzales-Black, this guiding principle is called Planning for Change, Not Perfection.

RESPONSIVE PLANNING IN THE AGE OF COVID-19

"The only thing that is certain is uncertainty."

Alicia Keys

Traditional systems of communication are built for traditional conditions. With information changing rapidly during times of crisis, it is impractical to believe that our systems, as they currently exist, can be responsive to every need that arises. In times of crisis, new information comes frequently, sometimes by the hour. Such rapid shifts require rapid iteration. Teams that are not equipped with processes and habits that allow for that iteration will have a steeper learning curve than teams seasoned with responsive practices.

The New School Rules:
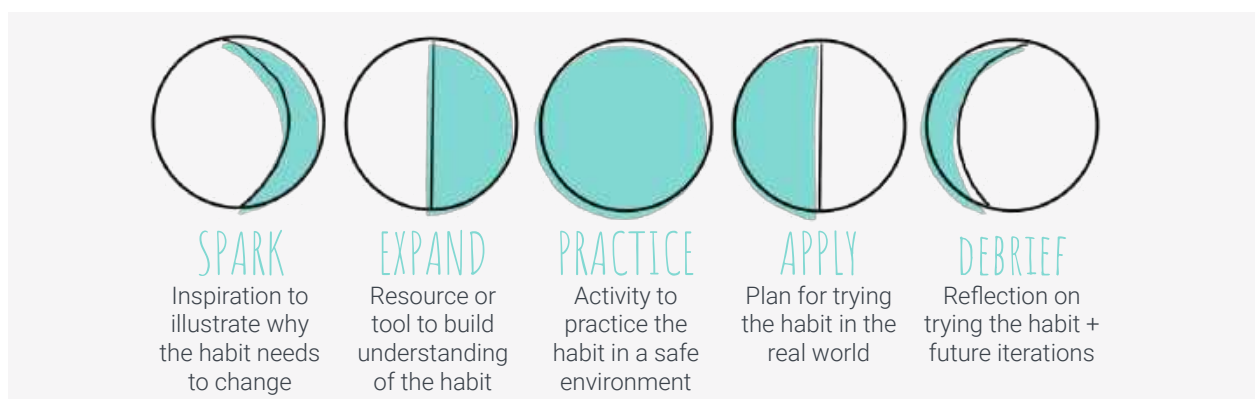## What is it + Why is it important in times of crisis?

It's been said that character is what you do when no one is looking, but in times of crisis, true character is what you do when pressure is applied. An organization's character is no different, and *The New School Rules (NSR)* gives us insight into what a responsive organization's character is made of. The 6 rules are:

1) Planning for Change, Not Perfection
2) Build Trust and Allow Authority to Spread
3) Define the Work Before You Define the People
4) Aim for "Safe Enough to Try" Versus Consensus
5) Harness the Flow and Let Information Go
6) Schools Grow When People Grow

By using these rules as guiding principles when planning for a return to brick-and-mortar teaching and learning, schools and districts can stay true to their goals and overall mission, without getting bottlenecked by consensus, misinformation, or employee burnout. These rules are especially relevant in times of intense change and essential for organizations to consider when planning their return.

The New Team Habits:
What is it + Why is it important in times of crisis?

SPARK	EXPAND	PRACTICE	APPLY	DEBRIEF
Inspiration to illustrate why the habit needs to change	Resource or tool to build understanding of the habit	Activity to practice the habit in a safe environment	Plan for trying the habit in the real world	Reflection on trying the habit + future iterations

While NSR gives us the philosophy behind the guidelines for responsive leadership and culture, it's important to consider the actionable practices that leaders can engage in because of these rules. Leaders, particularly in times of crisis, understand why new practices and dynamic shifts matter, but they can struggle to build buy-in, transfer knowledge to others, and make changes that are the right size—big enough to make an impact, but not so big as to overwhelm themselves or their teams. Leaders and their communities might solely focus on the goal when they should additionally focus on the small habits and practices that get them closer and closer to that goal.

Written by Kim, Keara Mascareñaz, and Kawai Lai, *The New Team Habits* is a companion guide to begin implementing these responsive practices at the team level, that introduces us to a framework for HOW to make these shifts. The framework, known as the SEPAD Method, is a step-by-step guide for introducing and adopting new team habits. When planning for a school or district's return, these five steps will help to build buy-in, create inspiration, and expand a school district's knowledge and opportunities to practice and test new habits to make lasting change.

Innovative Leadership Competencies:
What is it + Why is it important in times of crisis?

KNOW YOURSELF	NURTURE TRUST	CULTIVATE CURIOSITY	COMMUNICATE CONSTANTLY	LISTEN DEEPLY	DECIDE DELIBERATELY

COVID-19 has tested people and organizations in an unprecedented way. We have had to dramatically modify the way we work while experiencing chronic personal, economic, and health-related stressors. These circumstances underscore the key traits of effective leaders to guide teams through uncertainty, adversity, and rapid change. While there are many attributes of successful leaders, with additional variation depending on their role, these 6 core leadership competencies are critical in driving effective leadership for individuals, regardless of their role or perceived sphere of influence within an organization.

ABOUT THIS SERIES:
We have compiled the topics we know are top of mind for our district partners. We have aligned the topics to the NSR rule you can leverage, the habit you use to practice it, and the most important disposition(s) you will need to employ as a leader.

The *new* School Rules

The *new* Team Habits

INNOVATIVE LEADERSHIP COMPETENCIES

# Planning For School Opening

Rule 1: Planning for change, not perfection

The goal of planning is to get directional clarity so people know where to focus their attention and how to make sense of situations as they come about. By planning for change, not perfection, we continually stay open to new, better, and different options we may discover along the way.

Project Habit

We kick off work to increase the clarity of purpose, roles, and roadmap so that our team is more agile in adjusting our plans to meet our purpose.
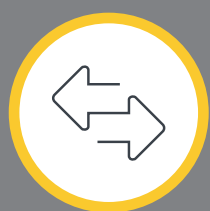
Innovative Leadership Competency: Decide Deliberately

A Leader makes responsive decisions guided by priorities, purpose, and data from real experiences. They do this by:

- Employing a system for self-management
- Developing effective team structures
- Aiming for "Safe Enough to Try" over consensus

Accepting ambiguity can be challenging for those of us who prefer to live in the world of certainty. We do not know the path this crisis will take us on next week, let alone this summer or fall. Through acknowledging our own limitations, we set the expectation that we will be planning with uncertainty and adding in cycles for iteration to pivot as we learn new information.

STEP 1 — IDENTIFY KNOWNS AND UNKNOWNS

Getting comfortable with, and distinguishing between, what we know (facts), what we're expecting (assumptions), and what we think (opinions) will help as we plan in the midst of uncertainty. We recommend that each team starts by developing lists of knowns and unknowns to guide planning. This exercise will allow the team to articulate and consider how we test facts, assumptions, and opinions through scenario planning and prototyping.

Facts: what we know

Assumptions: what we're expecting

Opinions: what we think

example

Knowns:	Known Unknowns:	Unknown Unknowns:
• Students will learn • Digital literacy for teachers and students is no longer optional • Students have experienced extreme disruption • Students still need to receive services rendered by the school (special education, meals, etc) • Staff is working with competing at-home priorities	• What day we will open our school buildings • If we have the right platforms to deliver asynchronous learning • How to effectively conduct virtual kindergarten	We don't fill this out but let's leave it here to symbolize that we need to always be ready for things to change!

BUILD SCENARIOS
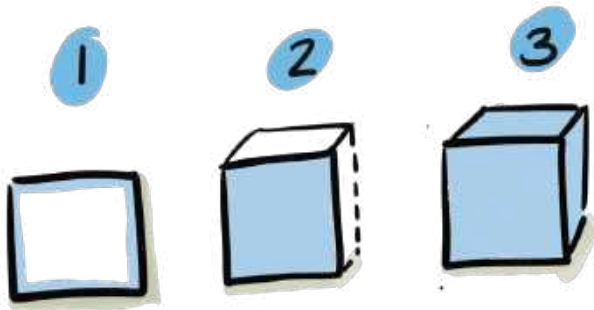
Due to the high number of known unknowns (not to mention unknown unknowns), there are countless realities that districts can imagine for the return to school and the operations of the School Year 2020-2021. Below we have simplified this uncertainty by highlighting three possible realities for planning purposes. These are intended to orient your team to different and equally important scenarios that will uncover how this year will be different from a typical school year while identifying what may need to change to accommodate new needs.

SCENARIO 1	SCENARIO 2	SCENARIO 3
e.g. School opens with no contact limiting	e.g. In school with social distancing and safety precautions	e.g. Not in school, with distance learning
Focus on the impact (needs and gaps) of remote learning during spring 2020 on students, staff, and community.	Support teaching and learning within the school building for the majority of students.	Support teaching and learning remotely for the majority of students. Consider how distance learning will need to evolve.

You might use these three common scenarios to start or develop your own scenarios based on the set of knowns and unknowns specific to your context. Rest assured, these are suggestions; there are no "correct" scenarios. Once you develop the initial scenarios, you can practice creating combinations and variations.

If there is one thing that all school districts do each year, it is prepare for the start of a new school year. Year after year, lockers are assigned, rosters are created, and bus routes scheduled. Interestingly, many of these routines and procedures go smoothly not because of standard operating procedures but because of institutional knowledge. With such a dramatic change in conditions, some districts are finding it helpful to create a **Scenario 0**. In this scenario, leaders can brainstorm all of the activities that would go into motion as a typical new school year begins. Outlining the routines and procedures of a standard year can help you to clarify your considerations when adjusting for the scenarios outlined above.

How can we define 'how to win'?

A strategy is a series of imperfect choices that we make with unknown information. That being said, we can make our best guess by building out the scenarios. You must plan, in the most general sense, for all of them so that you can narrow your focus to one when your known unknowns become knowns.

"There is no single, clear and pervasive definition of strategy and even less consensus on how to build one. When it succeeds it' seems a little like magic: Unknowable and unexplainable in advance but obvious in retrospect. It isn't. Really, strategy is about making specific choices to win in the marketplace."

A.G. Lafley and Roger L. Martin, *Playing To Win*

Winning in this sense means succeeding in the new normal SY 20-21 will create. It is crucial to use this time to live in what is possible. Possibility begets creativity and creativity leads to transformational change. Determining how you 'win' is completely dependent on your context, but generally planning for all scenarios helps to prioritize your efforts and resources.

Leaders are using this as an opportunity to create a common definition of success for their teams and communities. This is the time to choose a common philosophy and set of values that uphold your organization's and team's commitment to **equity** by designing a system that works for all students, rather than some. You can do that by deepening your understanding of the unique needs and challenges of your most vulnerable students and their families through their experiences within each of these scenarios. It is critical at this stage to intentionally plan to support all students through the transition, not just some.

Key questions that will inform "how to win" include:

What does success look like?	*Which stakeholders are impacted and how?*
How will you address the needs of all of your subgroups?	*What will be standard across our community vs. school-led?*
What might we need to reimagine? (systems or operations)	*How can we test out this scenario quickly and learn?*

To catapult yourself into the future and uncover the nuances within your scenario, we recommend building out scenarios in a way that feels authentic to your team and to your community. Remember that we are planning for change over perfection at this stage. We recognize that more information will become certain and your team will continue to learn, so the idea of perfection will only lead to delayed decision-making. Here are some ideas from the Education Elements team for how to gather more data:

- Empathize with stakeholders to learn more about their experiences in Spring 2020 while capturing their needs from their teachers, school, and programs as we prepare for SY 2020-2021. Here's a persona canvas we've leveraged. You can also pull some ideas from our Stakeholder Engagement Guide (created pre COVID19).

- Ideate and brainstorm virtually through shared documents, creating separate Scenario Canvases.

- Prototype scenario plans to quickly get ideas on paper in different formats.

Once you've captured more data about the scenarios and needs of stakeholders, we recommend that your team examines the scenarios side by side. Here's an example:

	SCENARIO 1	SCENARIO 2	SCENARIO 3
	e.g. School opens with no contact limiting	e.g. In school with social distancing and safety precautions	e.g. Not in school, with distance learning
SAMPLE	*Focus on the impact (needs and gaps) of remote learning during spring 2020 on students, staff and community.*	*Supports teaching and learning within the school building for the majority of students.*	*Supports teaching and learning remotely for the majority of students. Consider how distance learning will need to evolve.*
Upgrade Network Capabilities	No need to upgrade	We will have students in school for days and as a result will need to teach other virtually. Network upgrade crucial	We will need to provide reliable internet to students and staff. Network considerations unavoidable.
Transportation Services	No change	Routes adjusted to accommodate social distancing and flexible schedules	Transportation overhaul if students are not attending brick-and-mortar school
Distributing Lunch	No change	New lunch schedule, provide lunches for virtual learners	Provide meals to all students in need.
Professional Development	PD for differentiation and remediation due to learning loss	Support for differentiation and virtual learning, Move to combination of virtual and in-person PD	Support for differentiation and virtual learning, virtual PD.
Student Transitions (lunch, beginning of day, etc)	No change	Signs and markers for 6 ft distancing.	No change

STEP 3

RECOGNIZE CONSISTENCIES AND PRIORITIZE

As you complete the previous exercise, you will begin to notice **big rocks** - the topics that need to be addressed in most or all of the possible scenarios. These "big rocks" represent key processes and areas to tackle, redesign, and create for the next school year. The next step is to group your rocks according to three different factors that will help when trying to determine what to initiate now, who to involve, and how to begin. Below we offer indicators for Impact, Ease, and Urgency, recognizing that your situation may require additional considerations. We encourage you to develop indicators that meet your needs. To learn more about prioritizing, check out our Prioritization Guide.

IMPACT

We recommend first looking at which factors are being elevated across multiple scenario canvases, as this is an indicator that significant design or redesign may be necessary regardless of which scenario ends up playing out. You may adjust these criteria to include other factors such as strategic alignment, student impact, flexibility, and return on investment.

Equity Focus Lens: Our impact range falls from broad to targeted, meaning that no quadrant on our matrix represents low impact. Targeted impact highlights that the factor may be more impactful to some stakeholders or certain subgroups. **This is okay.** Equity is not about giving everyone the same thing but giving everyone what they need. Do not be deterred by a rock that falls into "targeted" impact.

Equity Focus Questions: Who are you considering when you identify a rock as having "broad impact" What rocks in your "targeted" impact section might have a profound impact on a subgroup of stakeholders?

| BROAD IMPACT Present in all scenarios	Present in 2 or more more scenarios	TARGETED IMPACT Present in only one scenario
Deploying 1 : 1 devices Upgrade network capabilities	Transportation Services Distributing Lunch Professional Development	
We know we have to contend with this no matter what.	**We know this is likely and therefore top of mind.**	**We can wait to address this later, when we have clarity on which scenario feels most likely.**

EASE

Some of these rocks will be variations of existing systems and structures, while other rocks will require new processes and systems of support. We recommend identifying which rocks will be easier to tackle and which ones will need time for a team to form and designs to be created. This thought exercise will help you to uncover feasibility, risk, and resource availability. You may choose to adjust these factors to include other ease criteria, such as cost and current staff capacity.

Equity Focus Lens: Remember, it has taken years to create our systems and it will take a great deal of work to dismantle inequitable systems. Do not be hesitant to accurately identify a rock as having higher difficulty if you recognize that it will require a departure from existing systems that benefit the few.

Equity Focus Question: Do the items that seem easier lead to recreating inequitable systems and processes?

HIGHER EASE We have a team that is responsible for doing this AND we have done this before	We have a team that is responsible for doing this OR we have done this before	HIGHER DIFFICULTY We don't have a team and we've never done this before
Distributing Lunch Upgrade Network Capabilities	Deploying 1 : 1 Devices Transportation Services	Professional Development
We know who is going to do it, how to get it done, and we are ready to start.	We've figured this out before and we can do it again.	We will need to pull a team together for the first time to tackle this new challenge.
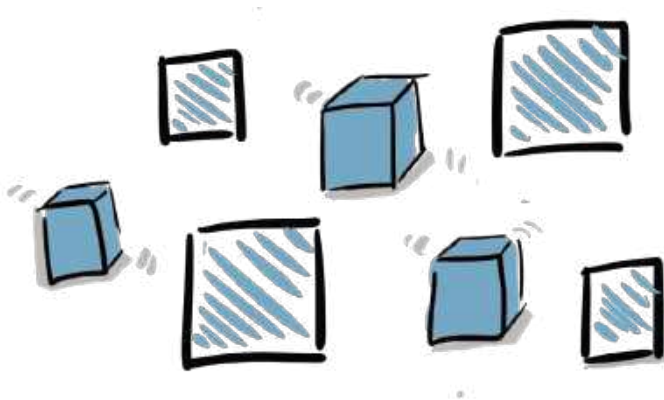
URGENCY

We are adding another layer of complexity into how we prioritize—urgency. A simple online search will tell you urgency is "**importance requiring swift action.**" In the middle of a crisis, everything feels urgent so we need to cut through the noise. Truly determining what is urgent requires that we add an additional layer to what we know and don't know. When determining urgency we consider 2 factors.

Dependency: information needed to make a final decision

'Commit by' timeline: We need to know when the decisions must be made so that we can commit to deciding during this timeline.]

Equity Focus Lens: Many decisions were made quickly and swift actions were taken to address emergent needs in this crisis, such as standing up meal delivery programs and deploying devices to students. Leaders acted on imperfect information and designed stopgap measures that now need to be expanded, formalized, or sustained through staffing and funding.

Equity Focus Question: How can you connect with your stakeholders to ensure you have the most up to date information on what is urgent to them?

Rocks	Dependency	Commit by
Deploying 1:1 Devices	Budget adjustments	ASAP
Upgrading Network	Legal consultation and budget adjustments	May 30
Distributing Lunch	Personnel	May 5
Transportation Services	School closure decision	June 1
Virtual Teacher PD	New school year	September

## How to prioritize using a 2x2 matrix

Start by drawing a two by two with "Impact" on the Y axis and "Ease" on the X axis. Your base matrix should resemble this one:
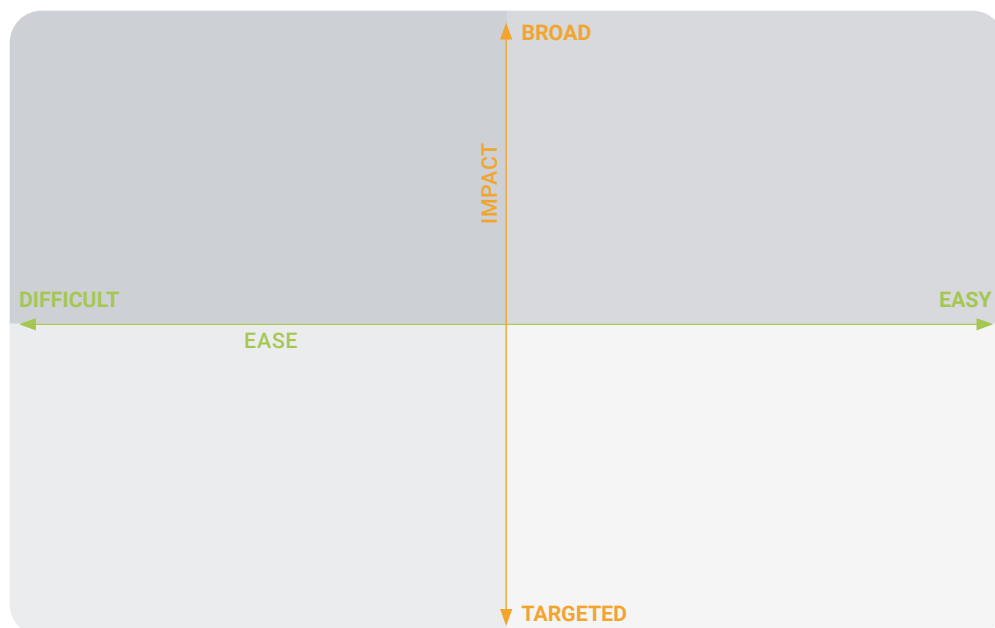
We recommend starting with the items present in all scenarios, moving from broad impact through targeted impact. Take a look at this blog post which provides guidance on how to plot each of your rocks. Once you have plotted your rocks, your matrix will start to be populated like this one:
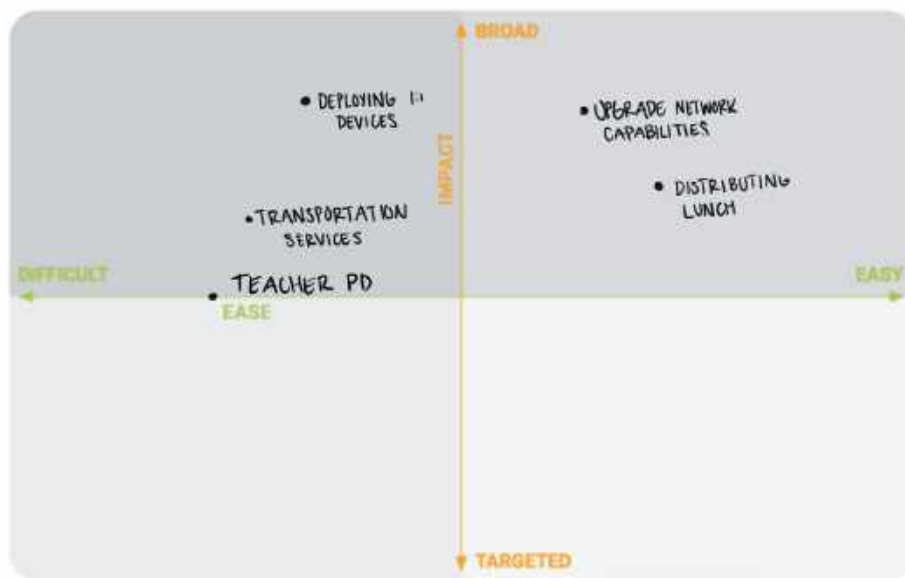
We can now add in the layer of urgency—either by numbering the order of the items or indicating by size which ones are most important to address first.
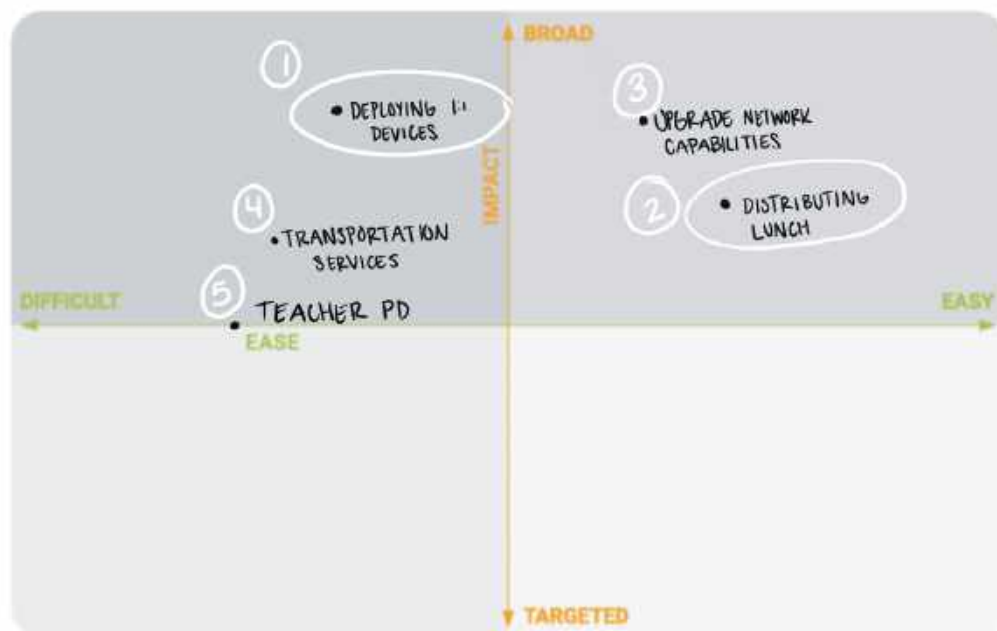
COMMUNICATE

When a rock is identified for redesign, you are likely expecting to increase effort to adjust a process or structure that has existed in your organization for a long time. Many of these big rocks represent departments, teams, and leaders who have built deep knowledge and expertise in these areas. Be cognizant of the impact of swift change on the individuals who have taken great pride in this work, and when possible, involve them in the problem-solving process.

If you are reading this guide, you are likely a leader carrying a great deal of responsibility for the people in your charge. This does not mean that you have to do this alone. Leadership and ingenuity have emerged in your community and within your ranks. We encourage you to lean on those who are stepping up amidst so much ambiguity. Consider augmenting your inner core of problem-solvers with some of these new leaders. First, their perspectives and experiences can contribute to your understanding of all the needs across your community. Second, you likely have previously untapped potential that lies dormant in your organization. What a great time to activate it! We recommend clarifying roles and providing guidance by creating parameters. An exercise like Make Space for Mistakes by the Wiseman Group can help you release some control and benefit from the knowledge of the collective.

A Note On Gratitude

Everyone is doing the best they can in these challenging times. It is important to remind ourselves that the need to act is essential but the need to care for others is paramount. As a leader in your community, model grace and gratitude knowing that these decisions have varying implications for your students, parents, and employees. A small expression of appreciation for their efforts may be the motivation to keep going.

Commit to Commit

Your team and your community will ask questions and make requests for certainty that are just not possible at this time. Even so, clear communication is still a powerful tool for trust-building and buy-in. Decisions regarding when to return to schools, how to reopen schools, and whether to extend remote learning will not be simple to clarify within a specific amount of time. To combat the anxiety of uncertainty, we recommend developing a high-level timeline of key milestones in your planning process to share with stakeholders. This is different from a project timeline—the purpose of this timeline is to articulate dependencies while managing the expectations from others on what information will be shared and when.

When a request surfaces and you do not know the answer yet, one practice to try is "Commit to Commit." This is an upgrade on the common, "I'll get back to you." When you do not have the necessary inputs or knowledge to answer a question, make a promise or agree to a request—commit to following up by a certain date. The commitment will provide clarity to the requestor on when they will receive a reply, while also providing you with a known amount of time to gather the necessary information. Without this, the requestor may make assumptions of their own or feel unsupported, unheard, or unseen.

About the Co-authors:

Simma Reingold, Managing Partner
Simma Reingold is a Managing Partner at Education Elements, leading engagements that directly tackle issues central to strategic planning, innovation, change management and technology. Over the course of her career, she has supported many of our largest cities and urban districts to creatively explore how we can expand equitable access to high-quality learning experiences for all students.

Andrea Goetchius, Associate Partner
Andrea Goetchius is an Associate Partner at Education Elements working with schools and districts to best meet the needs of all learners. Andrea specializes in projects that bring initiatives to scale across districts, regional organizations and state entities through the lens of strong innovative leadership. Additionally, Andrea has led districts through a strategic initiative planning to identify long term priorities, goals, and processes that respond to the changing needs of an organization.

Gabrielle Hewitt, Associate Partner
Gabrielle Hewitt is an Associate Partner at Education Elements who leads work with small and large districts across the country to impact student growth and success. Gabby has been a classroom teacher, team leader, and district manager for new teachers. Over the last decade, she has cultivated expertise in adult professional development. She supports district leaders in utilizing The NEW School Rules and The NEW Team Habits to make their teams and districts more responsive.

This is Part One of our Forging a Path Forward Series. Upcoming installments will address specific priorities you might consider as you plan for a return to physical schools. We will utilize the steps outlined in Part One to organize our thinking so we encourage you to work through a few of these exercises with your teams to identify your scenarios and big rocks.

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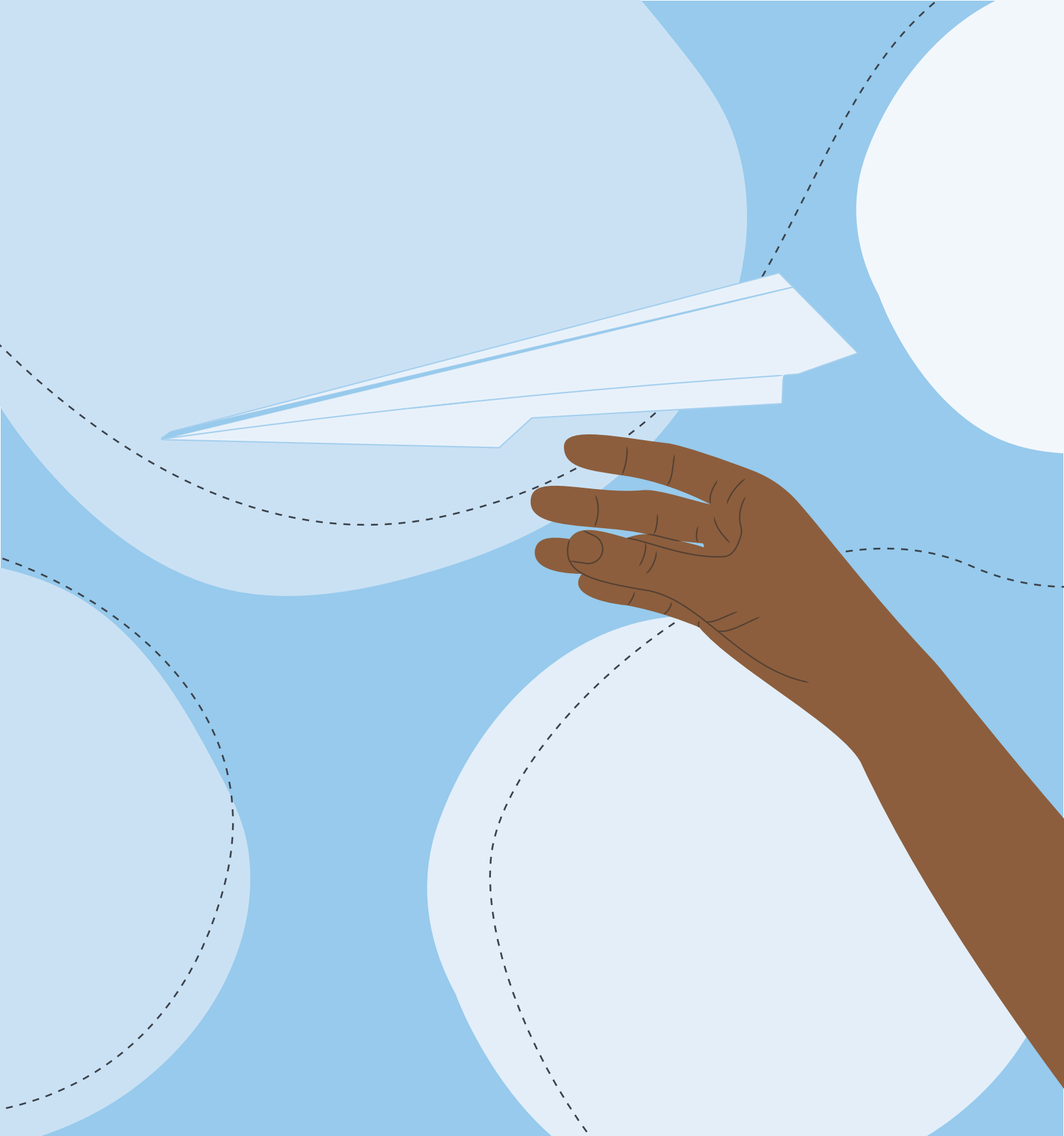
Part 2: Boldly Reimagining What Is Possible

Returning, Reimagining, Revamping

As a leader, you are juggling many different priorities, from the immediate needs of your students, families, and community members to the long term considerations as it relates to the upcoming school year.
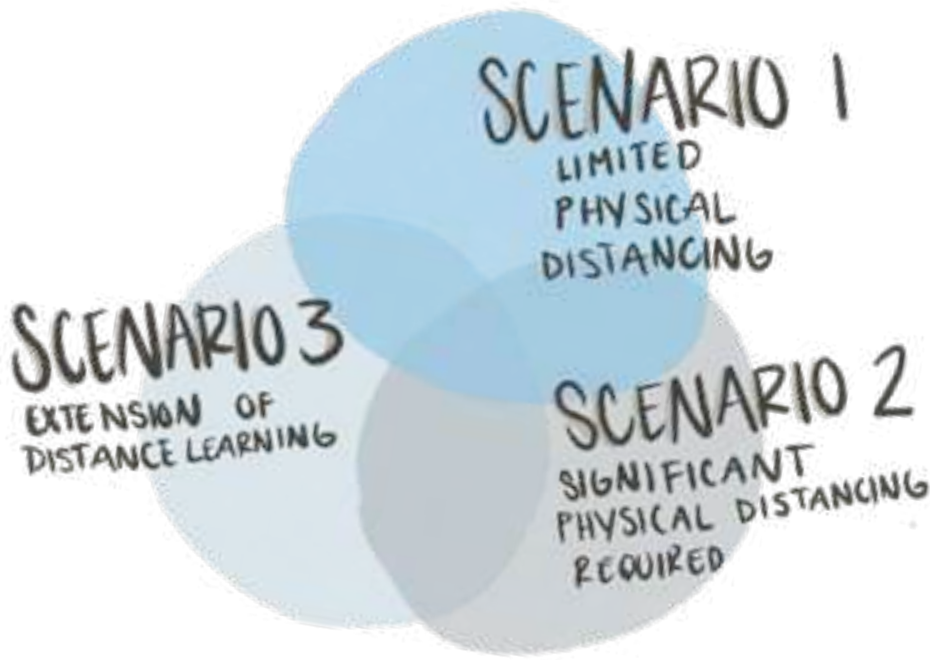
Much of what you are doing is living in what you know to be true (knowns) and the possibilities (similar to unknowns, but more exciting).

At this point, you have thought through your scenarios and you have an idea of "big rocks" that you know you must address (if not, pause here and read Part 1). You might even have a few people who have expressed interest in owning a topic, working group, or decision. It is now time to build prototypes, i.e., create possible approaches to address your big rocks. In this installment of Forging a Path Forward, we want to share how Education Elements thinks about designing with your values at the center.

These are uncertain times that require you to lead differently. Grounding yourself in the values your organization has committed to will be an important first step. Helping our leaders is a crucial next step. Organizations that operate using responsive practices and habits are the ones that endure through waves of decision-making when there are so many unknowns. It also allows organizations to reimagine without the traditional constraints of planning for perfection or aiming for consensus.

STEP 1
IDENTIFY KNOWNS AND UNKOWNS

STEP 2
BUILD SCENARIOS

STEP 3
RECOGNIZE CONSISTENCIES AND PRIORITIZE

STEP 4
COMMUNICATE

In Part 1, Forging a Path Forward: Responsive Return Planning we shared a 4 step process to begin Responsive Return Planning.

SCENARIO 1
LIMITED PHYSICAL DISTANCING

SCENARIO 3
EXTENSION OF DISTANCE LEARNING

SCENARIO 2
SIGNIFICANT PHYSICAL DISTANCING REQUIRED

Since we published our first paper, we have helped numerous districts think through the knowns and unknowns as they relate to return to school. The first step is to codify scenarios.

SCENARIOS

Clarifying the requirement of physical distancing

Scenario planning helps you prepare generally for multiple realities while allowing you to stay nimble and respond to change. We have adjusted the language of our scenarios to account for one nuance. In Scenario 1 we had previously said there was "no physical distancing." We have revised this to state "physical distance not required." This is a result of feedback that "no physical distancing" implied that school would

go back to "normal." We acknowledge that there is no going back to what was before COVID-19, but there will be districts that may not be required by the state or federal government to maintain physical distancing norms, though they may ultimately choose to put in place at least some norms due to feedback from stakeholders. Regardless of whether you perceive a scenario to be realistic, it is important to think through them all for two reasons.

First, it helps to unveil consistencies across many scenarios, giving your teams the confidence to act on decisions now because there may be some actions needed regardless of the scenario. Second, scenarios overlap and may need to be enacted at a moment's notice. For example, one district might start the year with Scenario 1 but may have a disruption that causes it to activate Scenario 3 rather abruptly (as was the case this spring).

Solidifying your priorities based on your core values

While every community has unique needs, we are finding themes across the country regarding topics with which leaders are grappling. These are the priorities we have heard repeatedly.

Health & Safety
How might we minimize the risk of illness?

Culture
How might we maintain a positive work culture during uncertainty?

Instruction
How might we ensure all students have access to high-quality instruction?

Staffing
How might we hire and maintain staff virtually who are prepared to tackle distance learning?

Wellness
How might we meet the social and emotional needs of staff and students who have experienced trauma?

Operations
How might we create processes and systems that reflect our values and need for flexibility?

Finances
How might we align spending to support our values & the systems we want to create?
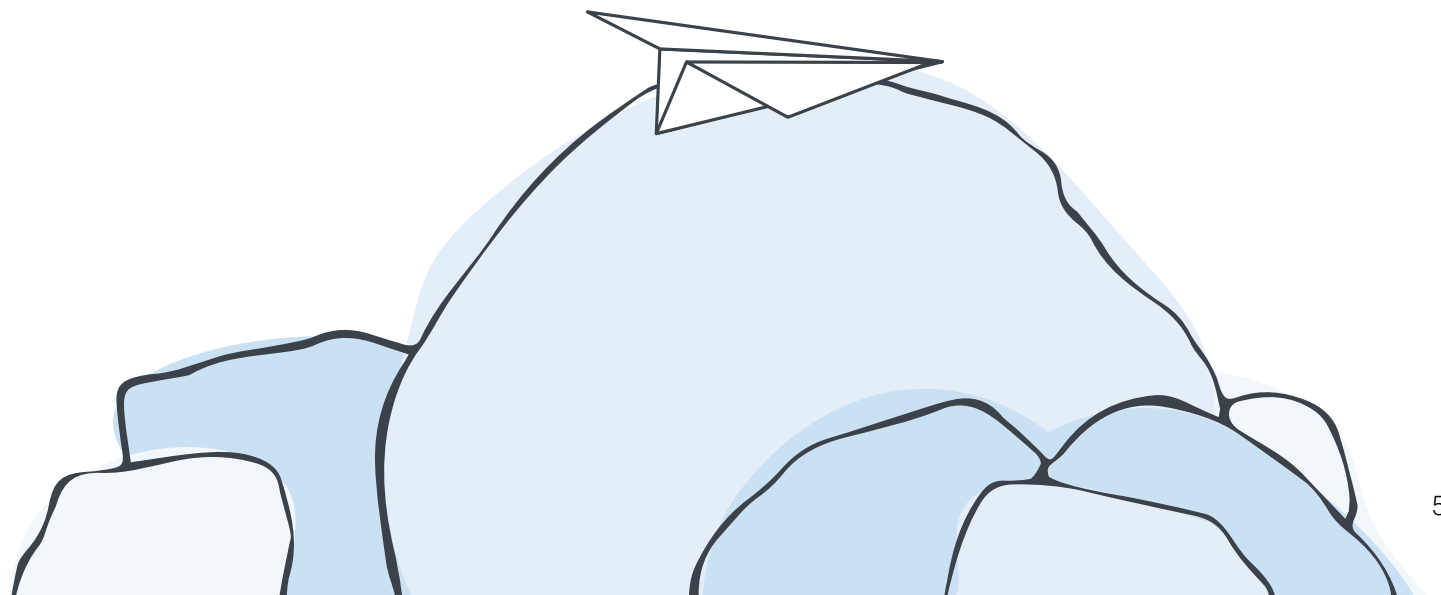
Our challenge for you is to consider how you will reframe these big rocks with your core values at the center.

Boldly Reimagining What Is Possible

Returning, Reimagining, Revamping
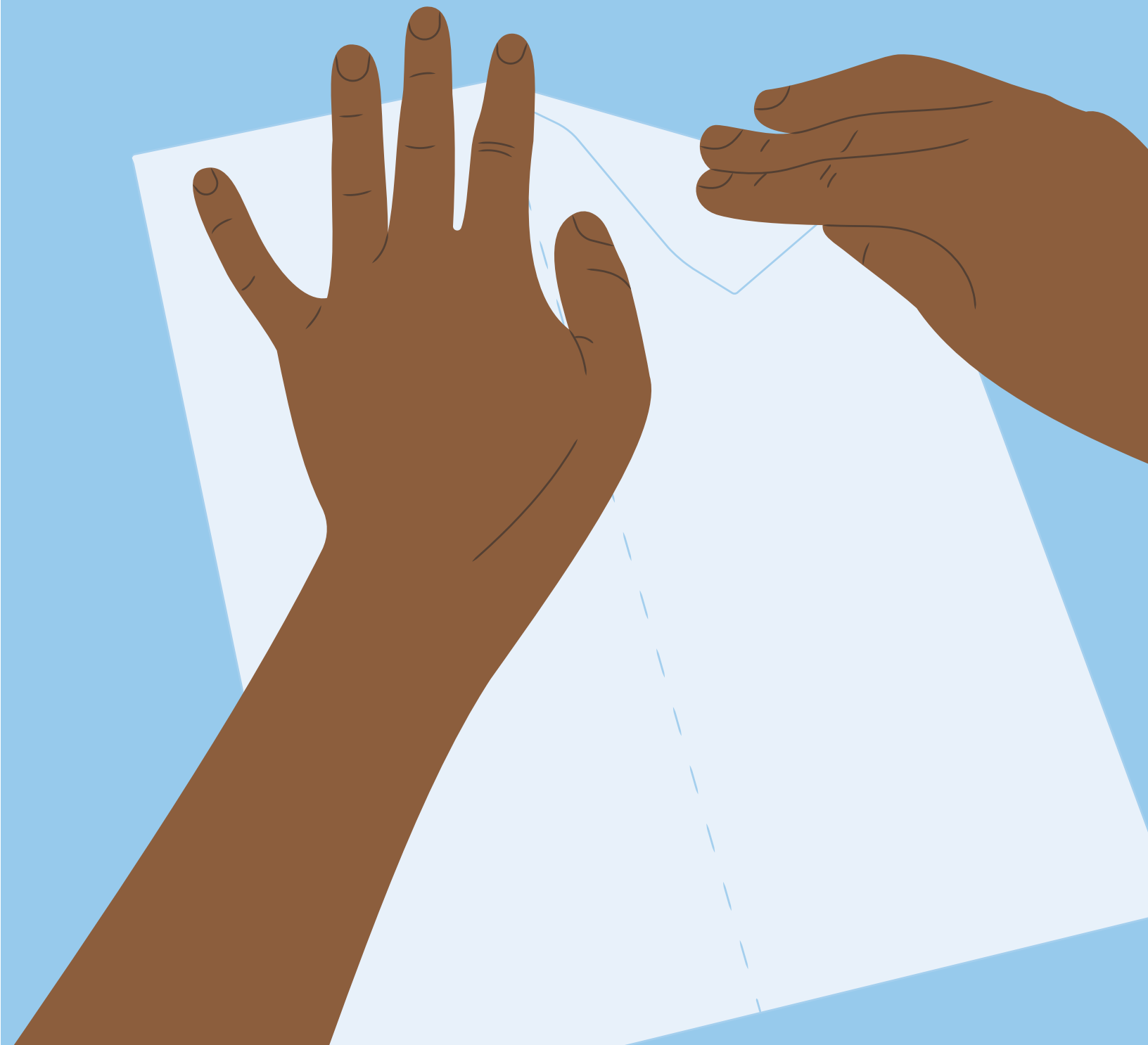
I recently learned that the Greek root for the word 'crisis' means 'to sift.' It's such an incredible metaphor I think...to think about the sifting process and what that does.... which is basically removing all the excess, the superficial, all that stuff that weighs us down and only leaving the essential. If we think about this crisis as a sifting process, it really is a rare opportunity for us to sift through our own lives, our communities, our connection and to think about: what is the most essential?

Golriz Lucina
Co-Founder + Head of Creative
Soulpancake
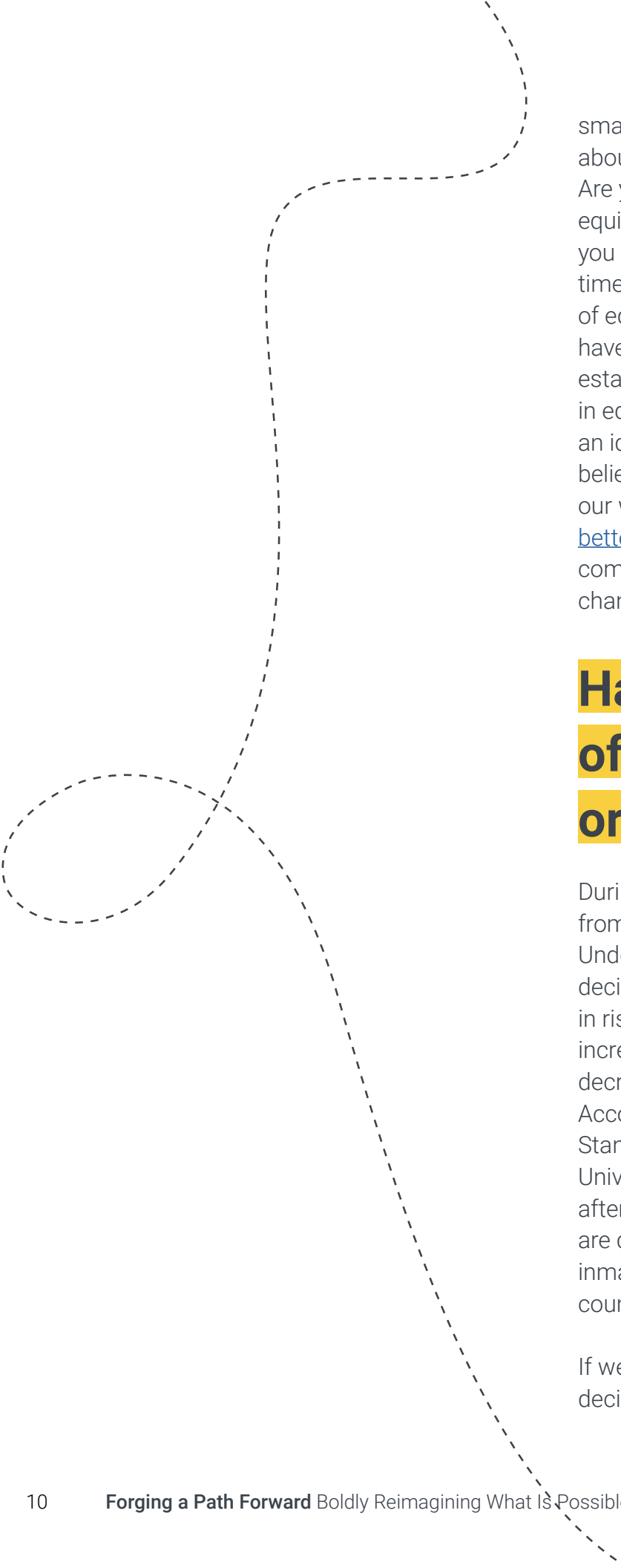
From virtual graduation ceremonies to mobile device distribution, we are seeing how

this crisis has proven that learners of all ages can be creative, action-oriented, and resilient in meeting new challenges.

We are seeing some impressive innovations that prove that the elimination of rigid structures, such as limitations on time, are only products of a certain mindset. Ninety-minute learning blocks can be flexible and repurposed into virtual office hours or asynchronous collaborative online work. We are experiencing first-hand what we knew all along: there are many different ways to teach and even more ways to learn. Some of the many barriers of time and space that limited us in meeting the needs of every student have been suspended, leading us at Education Elements to ask, "What is truly essential to creating high-quality and student-centered experiences?"

The need feels great as the flaws in our systems are more glaringly obvious. The injustices that have resulted from decades of abiding by antiquated systems that were designed to benefit the dominant group cannot be ignored. Education Elements is an organization that supports districts in building habits for responsiveness. We intentionally use the language of habits as it helps us create repeatable processes as individuals and as a team in service of a greater goal while spurring us to take actions that are
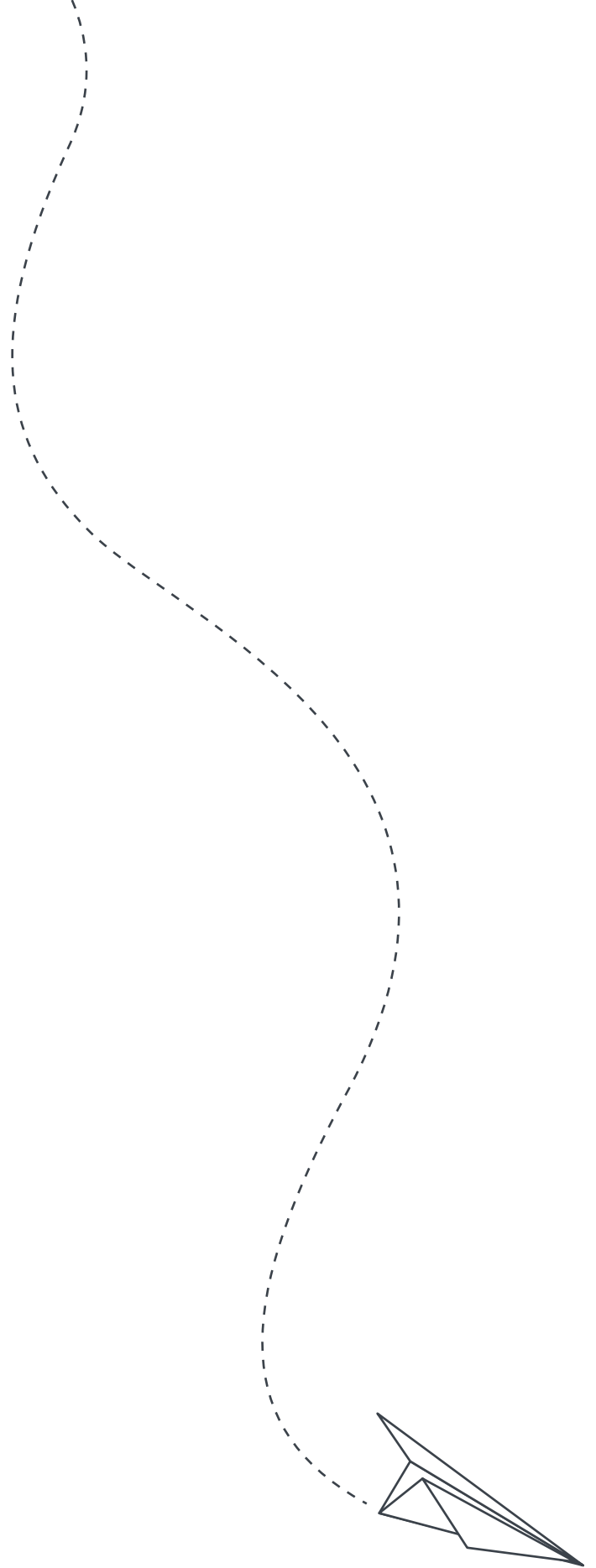
small enough to start. Now is the time to think about moving your identity as an organization. Are you going to be an organization that holds equity tight as a core value in name only or will you be an organization that intentionally uses this time to move from rhetoric to action on matters of equity? This is one area in which we, ourselves, have much room to improve, but we believe that establishing team habits and decisions grounded in equity now is the best lever to move towards an identity as an equitable organization. We believe that each small habit adds up and makes our world incrementally better every day ([1% better](#) some might say). These small changes compound over time and lead to transformational change in the long term.

Habits become part of the fabric of an organization's culture.

During these times of crisis, leaders often suffer from a heightened state of [decision fatigue](#). Under duress, leaders are making many different decisions that all feel urgent in nature and high in risk. It is important to remember that as we increase the number of decisions made, we decrease the quality of each of those decisions. According to a [study](#) by Jonathan Levav of Stanford and Shai Danziger of Ben-Gurion University, judges who preside over cases in the afternoon when their decision-making reserves are depleted are less likely to grant parole to inmates with the same charges as their morning counterparts.

If we build habits of responsiveness now, decisions become more routine and our

Dr. David Hardy, Managing Partner, Education Elements

The end of each quarter was a wonderful time for me. I would select my favorite tie and as I knotted it, my stomach would take a leap in excitement. I would be meeting with an honorable group of leaders: high school students from the district receiving the perfect attendance award. While commendable on its own, I loved being surrounded by students who worked towards their academic and personal goals, providing examples of excellence for their peers and the adults in our community.

I remember on one occasion the meeting did not go as planned. A rising senior approached me with a stern look on her face and said, "Mr. Hardy, I would like to speak with you about some personal matters, can I have time to speak with you?" In an instant, the years of experience as a teacher, principal, and superintendent dissolved as I felt like the tables had turned and I was now the student on the opposite end of the principal's desk. I accepted the request and I was in for an awakening.

The young lady approached my office carrying a large notebook with copious notes, post-it tags, and highlights. I welcomed her to sit at my round table where she laid out her notes and proceeded to review her list of ELEVEN concerns and requests.

As we approached the final item, she took a deep breath and showed me her course options for the upcoming year and alerted me to the fact that there were no advanced courses needed for college preparedness. There must have been a mistake. There was no way that we were graduating hundreds of seniors a year without meeting the

college requirements. I did my homework. By graduation standards, she had everything she needed to graduate high school but far from enough to prepare her for college. Her experience helped me understand why only 1% of the students in the school district I inherited graduated high school college and career ready. This was particularly concerning as we graduated mostly students of color. I was overwhelmed with so many questions but two things were clear: I had to learn more and I couldn't do this by myself.
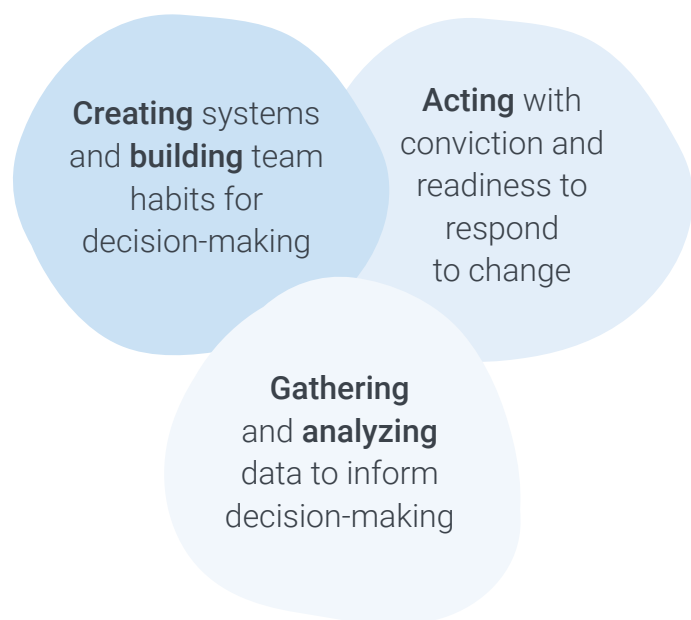
I met with more students, counselors, teachers, and community colleges and other local partners. Together we studied the challenge and built prototypes to address the need: our students needed access to courses that made them competitive for college.

I am proud of what we accomplished. We revamped our early college program, expanded our Advanced Placement options, and re-engaged our partnership with our local community college. We saw a 75% increase in students who received an Associates' Degree upon high school graduation.

This move towards equity all started with a young person's vision for themselves, a notebook, and a conversation. She expressed a vision that sometimes was for us, as adults, easy to overlook. To create a more equitable education system, we have to know names and experiences; aspirations and dreams. **We have to create with and not for.**

decision-making abilities are optimized. It is incumbent on leaders to prioritize building their team's habits to make certain decisions that are "safe enough to try," create an organizational identity grounded in equity, and make use of our team's untapped potential by distributing decision-making power to other willing and capable individuals. We call this the ability to "Decide Deliberately."

A leader who decides deliberately makes responsive decisions guided by purpose, priorities, data, and experiences. This looks like:

Creating systems and **building** team habits for decision-making

Acting with conviction and readiness to respond to change

Gathering and **analyzing** data to inform decision-making

Year after year, schools try slightly newer ideas, spend millions of dollars on similar products and interventions, yet results for our most vulnerable children and the teachers that teach them remain slow to change. The majority of children born in this country are children of color, yet the school systems that will one day support them are not engineered for their success. Districts must stop putting bandages on an open wound and surgically repair it by tackling the inequitable district practices, policies, and protocols that have been outdated and ineffective for generations.

Districts and their leaders need new systems of equitable thinking and action

that will enable school leaders to make drastic improvements in their buildings for their teachers and students to experience transformation.
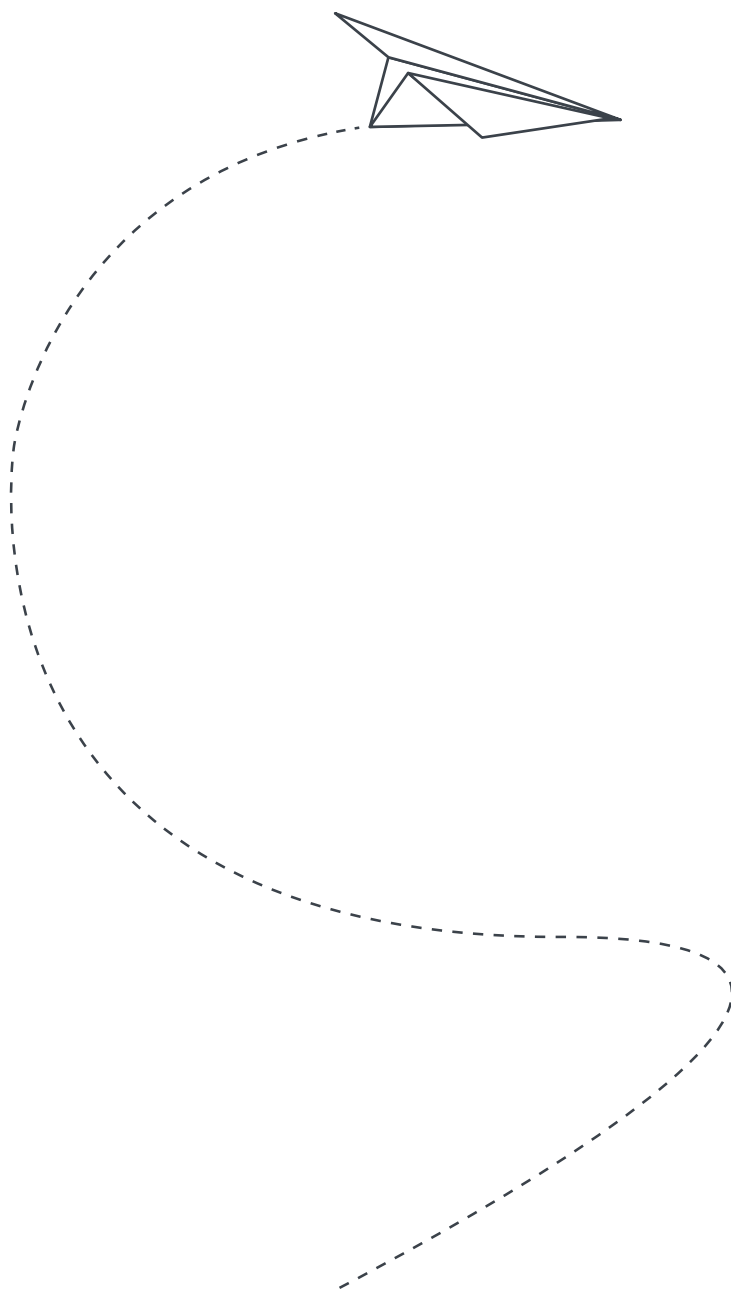
Here are some self-reflection questions to consider as a leader when deciding deliberately:

Elevate all voices

How can we adjust or redesign systems of decision-making to include voices and experiences representative of individuals or groups of varying identities that are positioned differently relative to privilege/oppression?
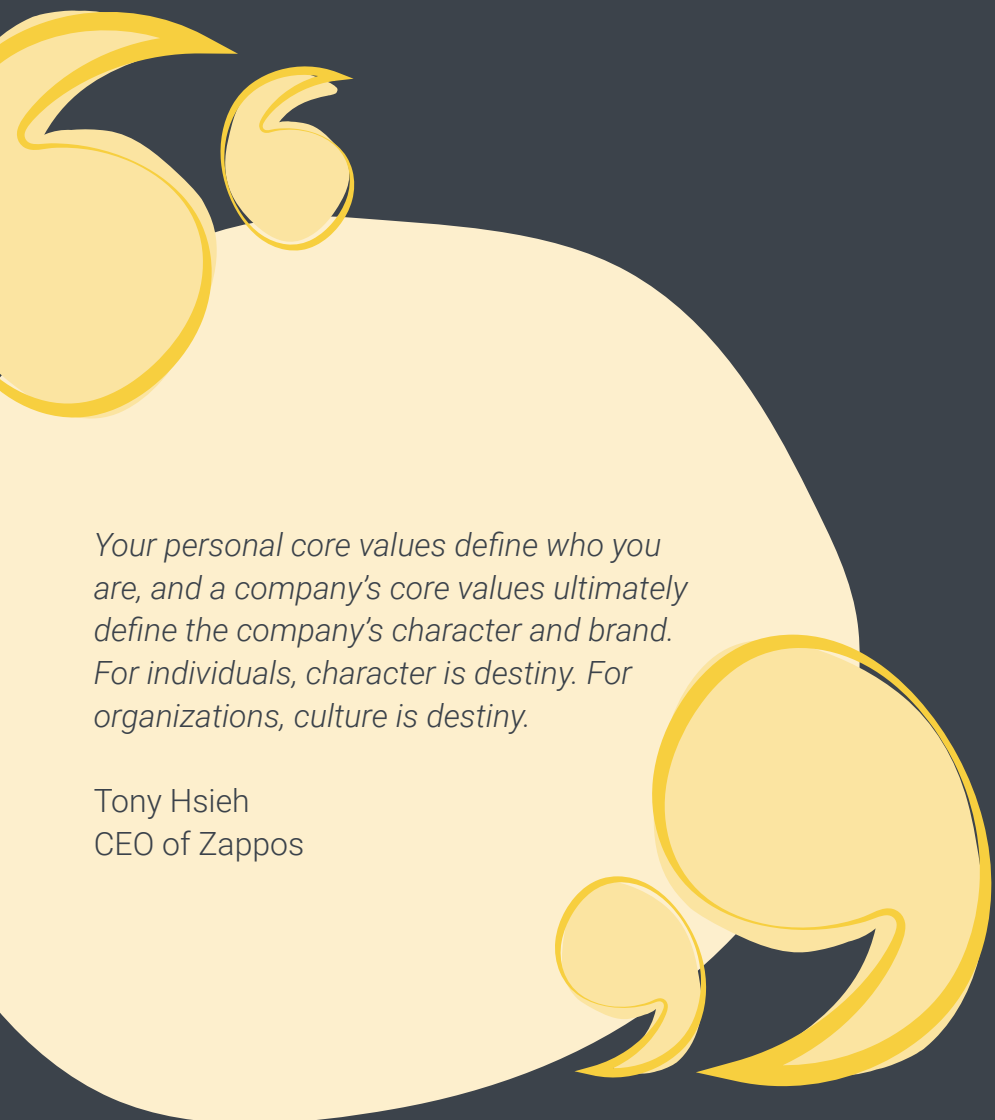
Design at the margins

How might these decisions impact individuals or groups of varying identities and positioned differently relative to privilege/oppression?

Recognize your bias

What blind spots might decision-makers have that could lead to unintended consequences and inequitable outcomes?

Your personal core values define who you are, and a company's core values ultimately define the company's character and brand. For individuals, character is destiny. For organizations, culture is destiny.

Tony Hsieh
CEO of Zappos

During uncertain times, it is challenging to determine "the right path" forward. After you have thought through the different scenarios, you know that there are many choices and that each takes you down a number of paths. You have a broad understanding of your areas of focus (big rocks) and you are ready to take action. You are also probably realizing that you will likely not activate one scenario on its own but will be required to move between different realities.

While there is a great deal of information you are waiting for, there is already a considerable amount of control you have within your organization to make an informed decision now.

It's up to leadership teams to determine and communicate the organizational core values. When faced with many challenging decisions, organizations can look to their values as a guide for decision-making through ambiguity.

EQUITY
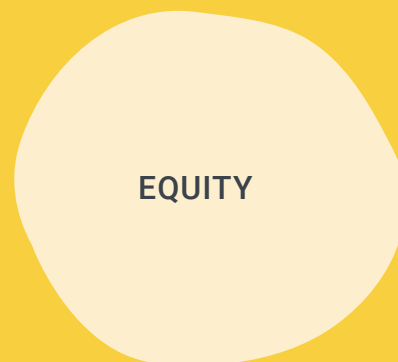
AGILITY

SAFETY

We offer these three values, among others, to guide reimagining systems as we return to school: equity, agility, safety.

Equity

Our Definition

Educational equity is the systemic recognition that our current racial and socioeconomic learning gaps are a result of deliberate action, and therefore require that a greater amount of attention and resources are dedicated to addressing biases and intentionally infusing anti-racist ideologies that advance the eradication of such barriers.

Our Charge

We know that [by staying silent we become complicit](#) in a long history of racial oppression. We recognize that it is a choice and a privilege to maintain our status quo – a status quo that was intentionally designed to elevate some voices while minimizing others. And if the status quo was designed this way, it is within our locus of control to redesign it differently. We can design equitable systems by co-creating these systems **WITH** our communities rather than **FOR** them. This cannot occur absent of individual anti-racist work.

Agility

Our Definition
The ability to remain nimble while providing structure and consistency. According to McKinsey, an agile organization is "[designed for both stability and dynamism] and is a network of teams…that operates in rapid learning and fast decision cycles." During return planning, ambiguity must be faced with agility as a core value. In our previous guide, we discussed the concept of "Planning for change, not perfection." We refer to this shift in mindset as a key ingredient to leading with agility at the center.

Our Charge
We want to help school districts operate with the agile mindset of deciding and moving forward with what is "safe enough to try" by adding the following three structures and concepts to their planning process.

1
Pivot
A change in strategy without a change in vision.

2
Sprint
A structure for managing work that enables teams to adjust and be responsive by planning for short blocks of time between 2-4 weeks.

3
Reversibility
According to Annie Duke, author and professional poker player, reversibility is described as the ease by which you can reverse a decision in order to determine the level of risk. By moving forward with a decision that has reversibility, teams are empowered to take action rather than risk delays in decision-making out of fear of making the "wrong one."

Safety

Our Definition

Prior to school closures, many schools and districts interpreted safety as meaning physical safety within the school building. During the pandemic, however, safety took on a larger meaning as communities across the world experienced a collective trauma. The impact of social isolation and the sudden and dramatic loss of lives, health, economic opportunity, and a sense of wellbeing will be with us for some time. As schools and districts plan to come back together, they must consider ways to prioritize the mental and physical wellbeing of students, staff, and families, regardless of physical location.

Our Charge

We design systems that ensure the physical and mental health of our community by

Remaining informed on the local, state, and federal guidance regarding reopening

Engaging in ongoing conversations with our stakeholders to directly ask them to identify their needs

Creating systems to support and help people process the collective trauma we have endured

A caution on "safety."

These values should not compete with one another. Safety as a value runs the risk of holding us back from moving towards more equitable systems. It also runs the risk of leading us to revert back to old, comfortable, and stable systems that do not allow for agility during uncertain times. While a safe return to school is paramount, it is time to boldly reimagine to meet the needs of ALL students.

"**Justice too long delayed is justice denied.**"

Dr. Martin Luther King, Jr.

At this point, you and your team can clearly name systems and structures that will not work as previously designed against the different potential scenarios for SY 2020-2021.

To successfully open schools, you will need to design some new systems that have never existed before and make decisions with incomplete information.

Through our Return Planning work with districts, we have encountered common "big rocks" that require attention and redesign. Within each big rock is a component or smaller system that needs to be considered. Before, during, and after building new systems you must take a critical eye to your current systems to see how they do or do not live up to your values.

We make this point because many of these big rocks have not worked for our marginalized communities. In fact, many of the systems within these big rocks were intentionally built not to work for marginalized people. This is not new information but as we face the unknown of the upcoming school year many of us are reevaluating our status quo to distinguish what is truly necessary from what is a tradition or preference. As we adapt to change amidst a global pandemic we must also apply the lenses of safety and agility. This will allow us to create strong and resilient systems that are built to be dynamic and adapt to the many unknowns that the future brings.

# Here are examples of the big rocks and the components you might consider within each.
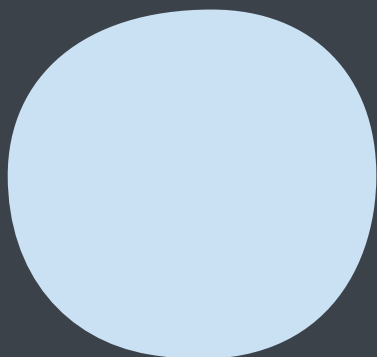
Instruction

– Attendance and Student Engagement
– Staffing and Their Support
– Flexible Instructional Models
– Demonstration of Mastery
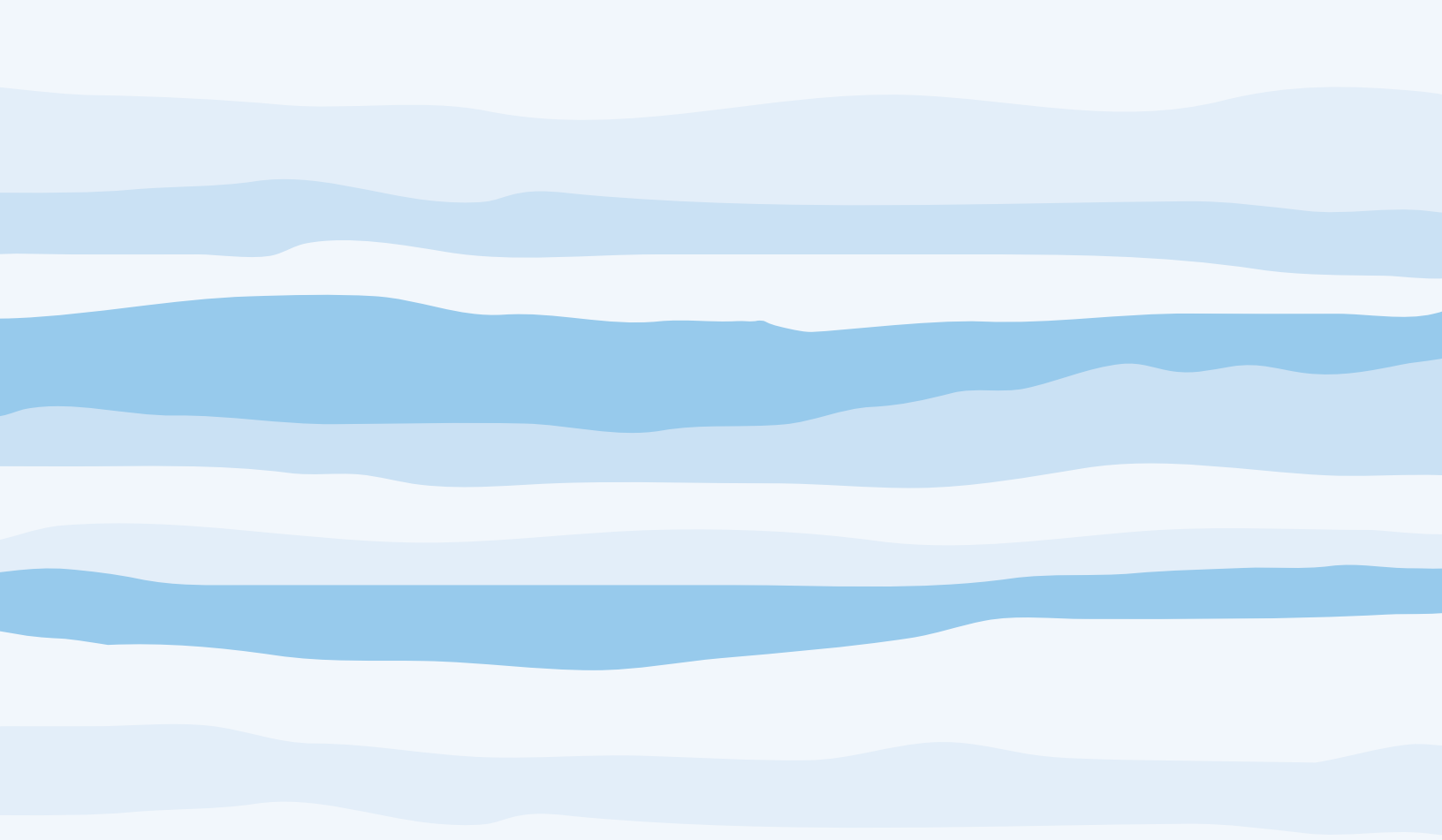– Learning Loss
– Master Schedule
– Student Ownership

Organizational Culture

– Building and Maintaining Culture
– Hiring and Role Reallocation
– Professional Development
– On-Boarding
– Staff Wellness
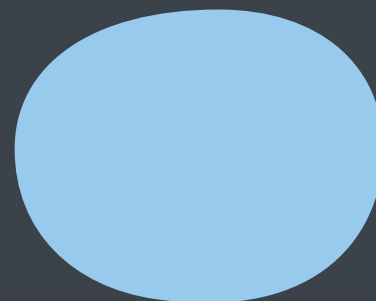
Wellness

– Mental Health Supports (School-Facing)
– Medical Needs and Considerations
– IEP and 504 Plan Supports
– Family Support for Learning and Social-Emotional Needs

Operations & Facilities

– Safety Procedures
– Sanitation of Facilities
– Protecting Operations Staff
– Entering/Exiting Buildings
– Space for Social Distancing
– Transportation and Student Mobility
 (vehicular and foot)

Communications

– Involvement and Engagement of Stakeholders
– Feedback Loops and Continuous Improvement
– Community Communications
– Building Influence and Trust

As you begin to build out solutions to your big rocks, we recommend using prototypes as a way to ensure your solutions are aligned to the values of equity, safety, and agility.

A prototype is a representation of an idea that you can test in a small, low-risk way to get immediate feedback and show proof of concept.

Traditionally, prototyping lives within a design cycle (learn more here). However, in order to build a prototype in an equitable way we recommend grounding the design of your prototypes in key design levers previously introduced from the equityXdesign Framework and following the steps to connect, include, and create.
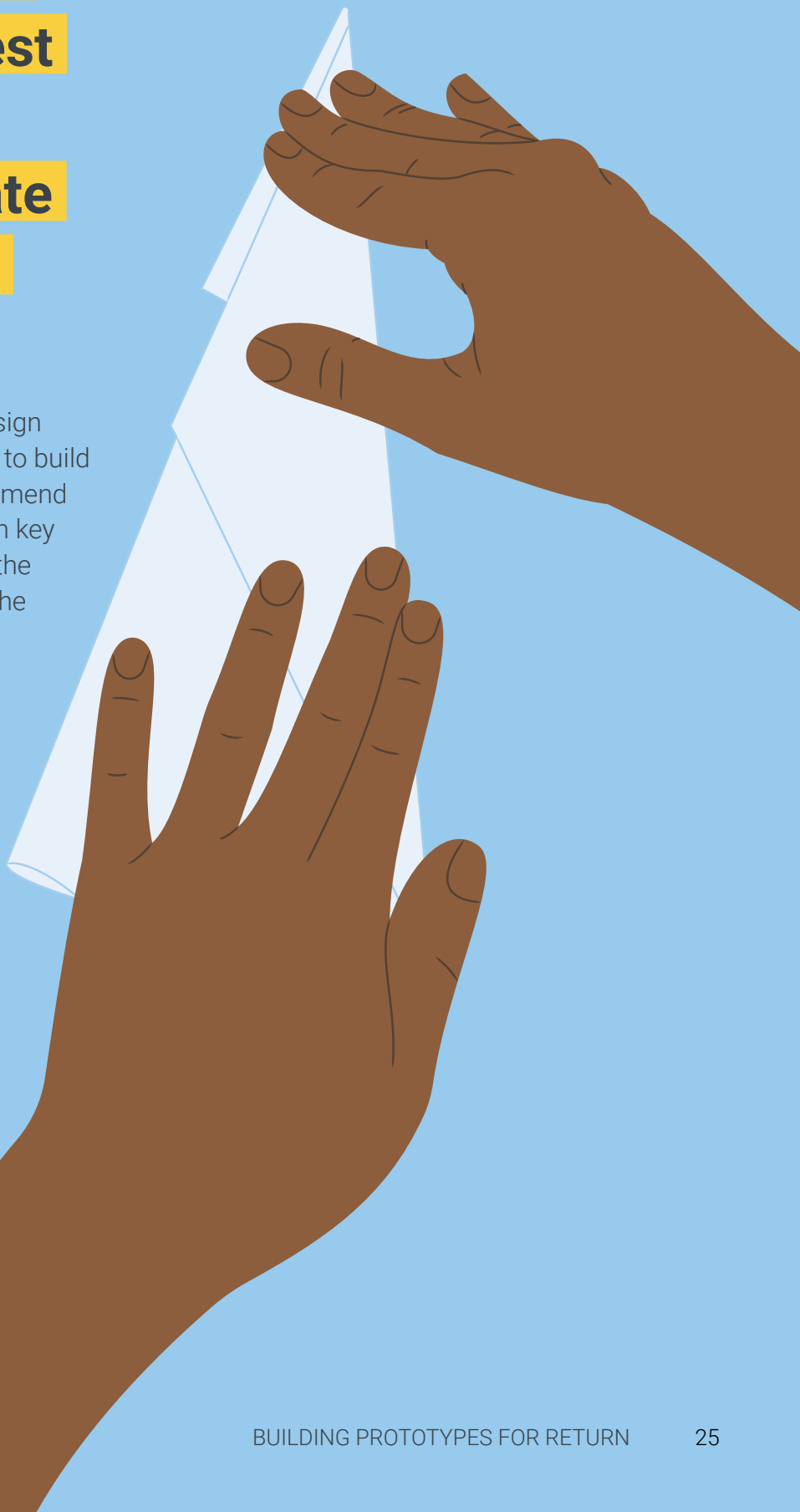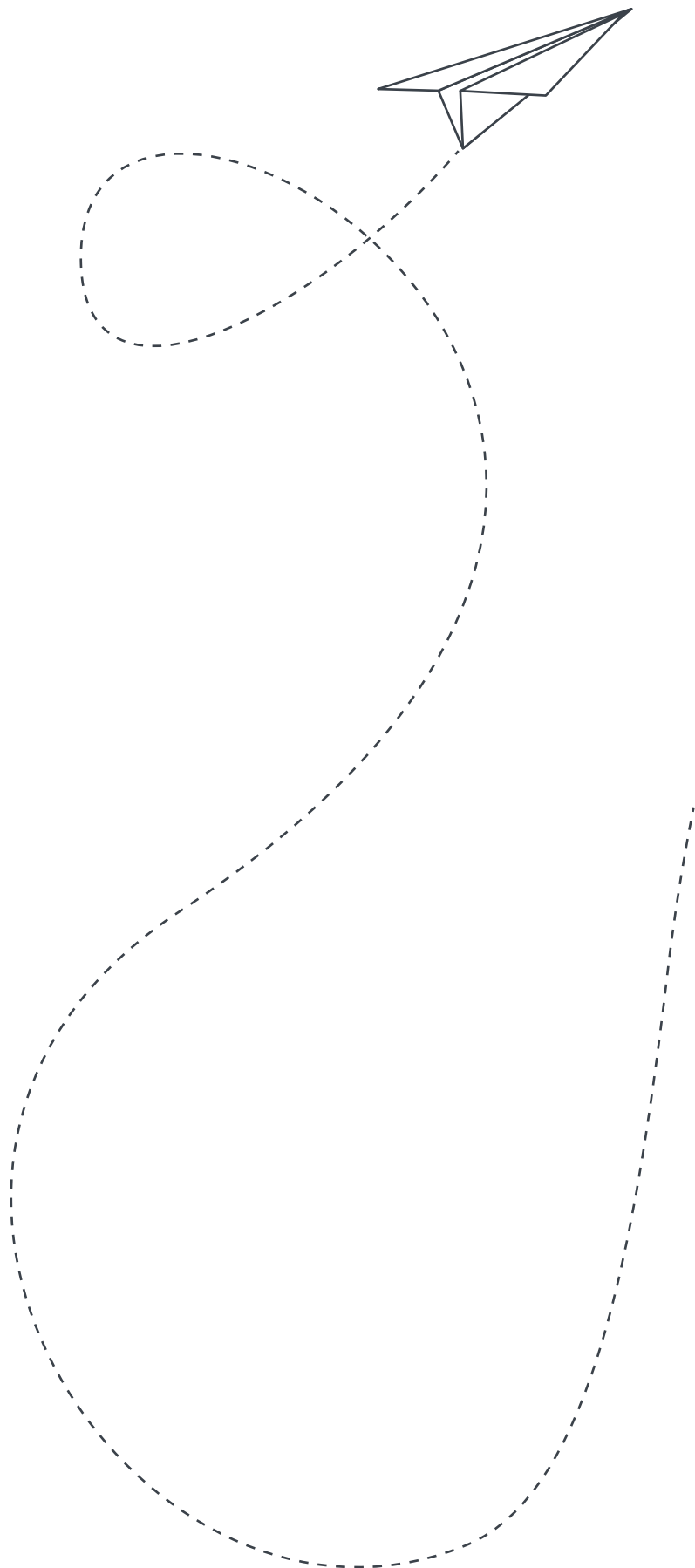
Connect

Leaders hold a great responsibility to make decisions for entire communities. We believe that a leader who seeks to redesign systems for equity, safety, and agility must be able to empathize with the varying perspective of those they serve. We **MUST** connect with our challenges by deeply understanding the origin, circumstances, and intentions in which they were created which may mean uncovering an uncomfortable and traumatic past.

Include

Families, students, teachers, and business leaders want and need to actively participate in their communities. For many communities, the school system is the epicenter. In order for districts to be universally effective they must create structures for inclusivity that authentically value diversity of thought at the decision-making table and take deliberate action to elevate marginalized voices.

Create

School districts must enable a culture that allows everyone to use their voices to create necessary and impactful change that will help them grow as individuals. Inviting individuals to co-create with you shows you care. At the same time, we need to look within and examine how our own identities, biases, power, and privilege might govern the relationships we have with the communities we serve. Following through on tough conversations and feedback establishes trust. People will not care about how much you know until they know how much you care.

"Not everything that is faced can be changed, but nothing can be changed until it is faced."

James Baldwin

Connect

As your big rocks are becoming more clear, it is now time to bring more leaders into your process. Whether you decide to create individual teams for each big rock or you want to tackle all big rocks as one team, now is a good time to evaluate how you engage your stakeholders by either inviting them to the decision-making team or seeking their feedback. You likely needed one group to make the broad decisions across all of your scenarios in your first sprint but now that you are getting closer to acting on your plan it is important to expand your reach.

Want to learn more about specific tactics aligned to your 'why'? Read more in our engagement guide here.

Determine the information you need to collect

Understanding what information you require to guide decision-making will guide how you approach your community throughout a major change. Common 'why's' for engaging with stakeholders include, but are not limited to:

Wanting feedback

Understanding the current state of a situation

Securing buy-in

Sourcing new ideas

Decide from whom you need the information

After articulating your 'why', identify stakeholders to engage.

Consider groups who are often sought after and have a louder voice vs. those who often do not have a seat at the table.

Consider who will truly be impacted most by the outcomes of the changes you seek to make, and how systemic inequities could exacerbate certain stakeholders' experiences post-change.

Consider how race, geography, positional authority, and other factors influence who consistently seizes and uses power in your community to make change.

Consider your personal biases – who do you tend to involve in decision-making, particularly when the timeline is short?

A big part of connecting to the challenge is certainly empathizing with the community; it is also understanding the circumstances that have created the challenge on the macro and micro level.

We encourage you to do your due diligence to understand racism and classism in education. This will help you ensure you do not recreate inequitable systems.

Getting Started
The Whiteness Project
Understanding Whiteness
Race: The Power of an Illusion
28 Common Racist Attitudes & Behaviors
1619 Podcast [NY Times]

Digging Deaper
RaceWorks Toolkit
Race and College Admissions
Conspire for Change Resources
Courageous Conversations
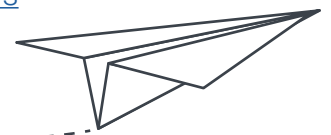
Distinguish decision-makers from contributors and consultants.

After identifying who to include and your 'why', distinguish between how you will engage with various stakeholders.

Are some absolutely crucial to involve because they are directly impacted by upcoming changes?

Are others better to include on a more ad hoc, consultative basis due to certain subject-matter expertise?

Are there any groups we should not include to allow for the liberty of expression of a marginalized group?

Are there any groups who historically have held power and had a voice, whose opinions do not weigh as heavily in this decision?

Engaging to identify your problem statement.

Now that you have clarified which group(s) to engage, circle back to your 'why'. Generate a specific, aligned problem statement that you will address using specific engagement tactics, such as:

We seek to collect feedback from Black parents, teacher-leaders, staff, and Black community leaders in order to increase safer learning environments for all students, especially our Black males.

We seek secure buy-in from parents of SpEd students, principals, policy experts, and SpEd staff about structures we have developed to support SpEd students in our return plan.

Include

Building Decision-Making Teams

How you approach return planning will be unique
to the needs of your district. In many states,
districts have been asked to develop their plan
for a return in a matter of weeks. The urgency of
the times may add pressure to act quickly, but
we implore you to take the time to examine your
team structure before you dig into the hard work.
In our approach to strategic planning, we have
compiled a guide for how you might consider
incorporating layers of feedback.

We must do something to improve the
governance of antiquated structures of schools.
In the current system, we uphold a governance
structure that is dominated by the dominant while
silencing the marginalized. We must intentionally
build teams that fuel stable leadership, thrive on
collaboration, and rest on a bedrock of trust. We
should strive to create inclusive environments
that not only invite the voices of the community
to the table but enable them to lead.

Here are the pitfalls we have seen in creating a project team with some suggestions for how to mitigate them:

PITFALL
Creating the team before
understanding the problem

AVOID BY
CLARIFYING THE WORK
In The New School Rules, we lean on rule #3,
Define the work before you define the people, to
clarify roles in a project. This is similar to selecting
a team. When we know the work in which we must
engage we can consider who has a stake in the
work. We must make a distinction to work with and
not just for a community. Partnership will allow the
needs to be authentically addressed.

PITFALL
Unclear decision-making

AVOID BY
DETERMINE HOW YOU WILL
DISTRIBUTE DECISIONS
If you are leading the return planning team, spend
some time considering what decisions you must
be involved in versus the ones that you can defer
to others. Share this with your team and then reflect
on what decisions you hope to make as a team.
Clarifying this on the front end of planning will
provide the team with the clarity needed to move
the work forward.

PITFALL
Use equity in name only

AVOID BY
MODEL VULNERABILITY
Equity and justice work require introspection and
reflection. It is not enough to simply involve equity as
a value without doing the work to question systems
and structures. Many of these structures have
existed to serve a specific purpose of efficiency or
practicality. It's very likely some of these systems do
not meet the needs of all of your students. Model
the vulnerability your team needs to question these
structures by raising the hard questions yourself.

PITFALL
The return planning team does
not represent your community

AVOID BY
CONSIDER MULTIPLE STRATEGIES
FOR INVOLVING ALL VOICES
Part of the issues we are grappling with is that people in
marginalized groups such as people of color are less likely
to be in positions of power. Look at your organization and
consider the following questions:

– What is the racial makeup of my student population?
– What is the racial makeup of my teachers and staff?
– What is the racial makeup of district leadership?

If you notice that the demographics get less
representative or diverse the higher up the chain of
command you go, you know that by just including your
leadership team, you are likely missing key stakeholder
perspectives, including the people in whose name you
do this work. Consider diversifying your team to include
families, students, teachers, principals, and community
members of different backgrounds.

PITFALL
You look to leaders of color to
represent an entire perspective

AVOID BY
ESTABLISH PROTOCOLS
TO EXAMINE PERSPECTIVES
When planning for return, we might engage in a
binary process, where white people get to share their
perspectives as individuals, yet people of color are
unconsciously tapped to be the spokesperson for
their racial group. Avoid this by seeking perspectives
from many stakeholders so a diverse voice is present
throughout. This might include the use of surveys,
interviews, or forums. Make sure to incorporate protocols
to ensure you are designing for perspectives different
from your own.

Include

Stakeholder Engagement
For Problem-Solving

Stakeholder engagement is always important. In times of crisis and uncertainty, engaging your stakeholders throughout your decision-making process becomes essential. Having varying perspectives allows you to socialize your values and gives you space to include voices at the margins before finalizing them. Does your community have the same understanding of the values you hold or the terms you use to communicate? And does your community feel that the impact of COVID-19 closures is truly known by the organization?

The reality is that all of us have experienced trauma at some level, the extent of which varies based on how you were impacted by the pandemic. Some people have gotten ill; others have lost loved ones to the virus; some are grappling with the economic impact. Many people are facing these challenges on top of previous trauma. According to the US Dept of Health and Human Services' Substance Abuse and Mental Health Services Administration there are a few actions we can take to incorporate a trauma-informed lens:

Support Regulation

Prioritize Relationships

Create Trust and Offer Transparency

Support Voice, Choice, and Empowerment

You have an opportunity to address the latter two through your return planning. Utilize stakeholder engagement to both socialize your plan and receive feedback while also making space for people to express their preferences and choices to ensure they feel like a part of the plan.

We encourage you to utilize our framework while adding one additional layer: narrowing choices during engagement and sharing your next steps.

Narrow choices

As mentioned previously, just like school system leaders, stakeholders are dealing with decision fatigue. In seeking feedback from your stakeholders we advise that you clarify your request. If during typical circumstances you would ask an open-ended question, we encourage you to provide options or a proposal to which they can react.

Share your next steps

Take this time to clarify how you will incorporate the feedback provided into the plan. This will increase transparency by showing folks how you are considering various data points and how you plan to communicate back. For more ideas read: [Blog] Using Your Strategic Plan to Keep Your Stakeholders Informed and Engaged During Times of Change.

Create

Stakeholder engagement will equip you with ideas, preferences and some clarity on what your community needs. From there, you have used that data to define and frame the underlying challenges or problems that need to be solved with your prototypes. It is now time to begin creating prototypes for your big rocks.
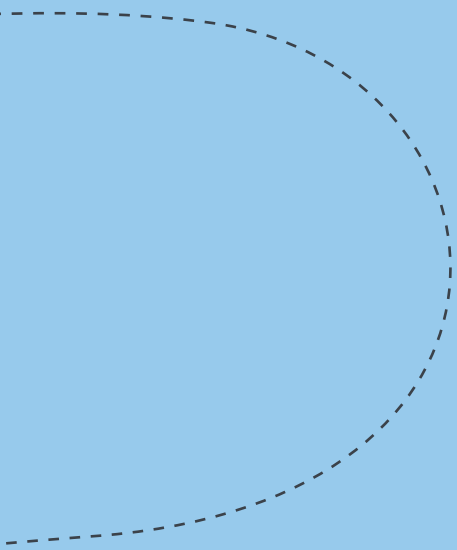
How to create prototypes for one problem statement

Generate a diverse set of prototypes

When creating prototypes, it's important that you continue to bring a diverse set of voices and perspectives to the table and generate as many solutions as possible to the key problems within your big rocks. We recommend bringing together groups of about 4-6 people per problem statement and allowing time to first independently generate ideas. This ensures that you are inviting ideas from all team members, regardless of the power that they may hold in that space.

Engage in preliminary "testing" of your prototypes through conversation

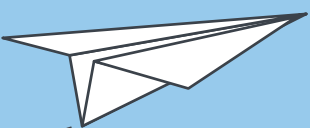You won't be able to design your prototypes with representation of every stakeholder or user
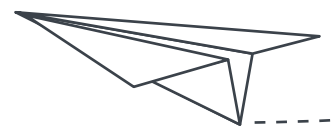
at the margin. Therefore, it's important for you to solicit initial reactions and feedback for your prototypes prior to officially testing them in the real world. This is especially true for systems-level prototyping because by nature they are meant to serve a larger audience, therefore making them harder to test in a low-impact way. Use this feedback to iterate on your prototype prior to testing.

Create a clear theory of action and measure for success

You're almost ready to test your prototype! A key function of a prototype is to establish proof of concept—will this thing work the way we want it to? Therefore, prior to putting your prototype into action, establish a clear theory you want to test: "IF...THEN..." Coupled with the hypothesis, be sure to explicitly name what success will look like and what data needs to be collected throughout the testing process to support the hypothesis. Finally, we recommend scheduling time to reflect on the implementation of the prototype, analyze the collected learning, and iterate on your design.

Share prototypes and **seek feedback** from stakeholders

Incorporate feedback to consolidate prototypes to create a proposal

Create

Speaking to the Future

Does this prototype promote new, equitable ideas or simply restate existing systems that were never designed to serve all students?

Extending Learning Time

Easing the High School-to-College Transition

After you've generated your solutions or prototype ideas, create the time to intentionally pause to connect, notice, and reflect on the ideas with an equity lens. Our Education Elements team leverages the expertise of others, two of which are highlighted below and we encourage you to dig deeper through their resources.

Recommended by Key Design Levers from Equity Design Collaborative

Recommended by Alliance for Excellent Education (for prioritizing in a COVID-19 response)

Meeting Students' Basic Needs

Determining Students' Academic, Social, and Emotional Needs

Designing at the Margins

Who does this prototype serve? Whose needs are unaccounted for? Does this prototype create inclusion and belonging for all stakeholders?

Expanding and Improving Remote Learning

Ensuring Equity in Fiscal Policies

Making the Invisible Visible

What assumptions might we be making as designers? Are we still upholding underlying systems of inequity?

Recommended by Key Design Levers from Equity Design Collaborative

Recommended by Alliance for Excellent Education (for prioritizing in a COVID-19 response)

Create

Gut Check Your Prototypes Against Your Values

Before testing your prototype, we recommend pausing and ensuring that your prototypes are in alignment with your core values. You should develop questions that push your thinking around this alignment. For example, here are questions you might ask using the core values of equity, safety, and agility.

Equity
Does this prototype serve the heard needs of our stakeholders at the margins?

Safety
How does this prototype work to ensure all stakeholders will feel reasonably safe (physically) and to build in structures to support mental health?

Agility
Does my prototype leave room to be responsive and pivot as needed?

Determining Which Prototypes to Test

Traditionally prototypes are tested in small, low-risk environments where a polished product is less important than making sure you are able to prove your hypothesis. In education, this might be with a few students, one class, or possibly a grade level. Given that you are likely trying to test solutions that are meant to serve district-wide needs, it will be important to align on a group size with who you are okay testing the prototype on

and potentially failing. We recommend evaluating the reversibility of your decisions in order to give you confidence to move forward. You might want to use these tips as a discussion point or you might evaluate each decision within your team.

In many instances, going in new directions will be scary and daunting. Those risks are necessary to make real change; sometimes it's a bigger risk to go too small as it may lead you to lose trust from your community because the urgency and impact on kids are too big. Reimagining is not easy, yet it might be helpful to put things into perspective to see if what scares you is as daunting as you think.

Low Reversibility
It will be very difficult to recover from the decision if it does not work and you will have to do significant work to reestablish trust, resources, and/or credibility.

Medium Reversibility
You can recover quickly from the decision if it does not work but you might have to do work to reestablish some trust, resources, or credibility.

High Reversibility
You will be able to recover quickly from the decision if it does not work and you will not lose trust, resources, or credibility.

Sharing Proposals

By the end of this process you should have a few prototypes that you will want to turn into proposals. At this point, we recommend you consider activating the channels you used previously to communicate updates. Ensure that you have opportunities for ongoing feedback and that you set aside a dedicated time to host a retrospective to reflect on what has worked and where you must pivot.
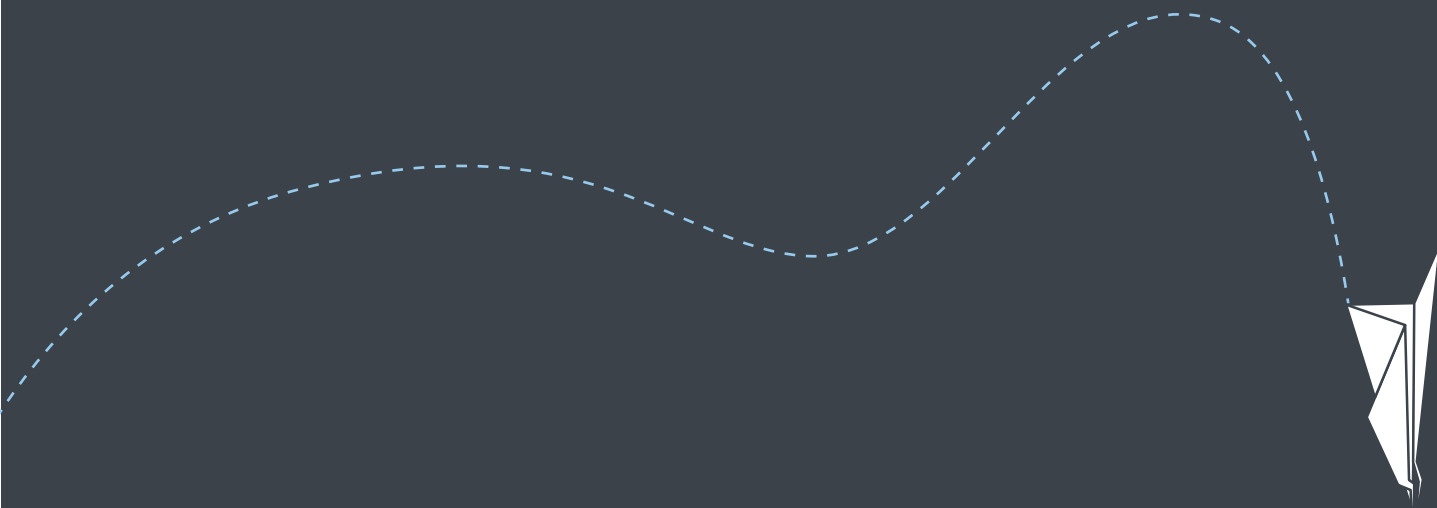
PITFALL
Selecting one path without
considering multiple solutions

AVOID BY
PROTOTYPE development with the goal of leaving
with three options.
ANNOUNCE to stakeholders that they will evaluate
three options to provide feedback.

PITFALL
Lack of transparency
with final decision

AVOID BY
CREATE a website or a place for stakeholders
to see progress.
PROVIDE a space for stakeholders to respond
to the decision before it goes into action.

PITFALL
Losing your "why" along the way

AVOID BY
KEEP the problem statement at the top of all
produced documents and/or conversations.
BE intentional about reflecting on how the solution
upholds your values.

PITFALL
Letting the loudest voices lead

AVOID BY
NAME the power and privilege that exists within
the space and call on everyone to work towards
equity of voice.
COMMUNICATE who was involved in the decision-
making process and their roles.
HAVE all members confirm the final decisions using
an objection/no-objection protocol.

PITFALL
Only including or
elevating the "usuals"

AVOID BY
ESTABLISH dates for stakeholder feedback.
GENERATE a list of stakeholders at the margins
across a variety of identifiers (race, socioeconomic,
English as a second language, etc.).
ACKNOWLEDGE that you might feel discomfort
engaging voices or perspectives that are not
traditionally heard.

Education Elements

PART 3:

CAPTURE THE OPPORTUNITY

Steps to Redesign School-Level Systems for Equity

ABOUT THE SERIES

This series was created in response to the radical transformation and change that our educational systems were forced to undergo in a short amount of time because of the COVID-19 pandemic.

We see this as an opportunity to further redesign our systems that have historically uplifted only some students, not all. The inequity within our educational systems has only been exacerbated during this time of crisis. We are at a pivotal point and have the space to intentionally change the narrative around universal student achievement and design new systems aimed at creating opportunities for achievement for all.

PART 1:

We began with "[Forging the Path Forward: How to Design a Responsive Return Plan](#)" that allowed school districts to determine all the possible paths for SY20-21, with an explicit intent to address the needs of all students. In this first part of the series, we guided districts through using the best practices in cycles of crisis management and by following the four steps of responsive return planning. Leaders left this part of the series with actions for possible scenarios this fall and focus areas, or "big rocks," for which to plan for moving forward. Big rocks included areas such as Health & Safety, Culture, Instruction, Operations, Staffing, and Finances.

PART 2:

In part two of the series, "[Boldly Reimagining What Is Possible](#)," we guided leaders through protocols for designing prototypes for these big rocks with an explicit lens on, and alignment to, the core values of equity, safety, and agility. Using the framework of "Connect, Include, and Create," leaders were pushed to reimagine more equitable district level systems, designed with the needs of key stakeholders at the forefront.

PART 3:

In this final installment of the series, we focus on redesign and change at the school-level – equitable redesign within our locus of control and influence. This guide and digital workbook provides school leaders with a tactical process to revamp systems, whether virtual or in person, within their control, embracing the lens of equity. We call on leaders to start with their own beliefs and biases that uphold oppressive systems and then guide them through redesigning for marginalized groups within their schools, as we follow the framework of "Connect, Include, Create" introduced in part two. We want to support school leaders to redesign school-level systems for equity and create communities in which all students are empowered and uplifted to reach their full potential.

CAPTURE THE OPPORTUNITY

Steps to Redesign School-Level Systems for Equity

WHY NOW?

With districts and schools in the process of planning for fall return, now is a time when schools are able to substantially change systems. **Whether you are returning to school in person, virtual, or in a hybrid model, we believe that as you make changes and design new systems, you must explicitly design with equity at the center.** Use this guide to redefine your systems for an equitable learning environment for all your students returning to school this fall.

"Any return to normal is a return to the normality of racism"

- IBRAM X. KENDI

Our country was founded on the oppression of Black people, women, and Indigenous people, among others. This created social norms and beliefs that are ingrained into the fabric of our society and subconsciously affect how we all think. There are many systems of power that routinely produce racially inequitable outcomes for people of color while reinforcing advantages for white people. School systems are complex ecosystems designed within this context of structural racism.

WHAT IS EDUCATIONAL EQUITY?

Educational Equity is the recognition that the barriers that marginalized students face are due to deliberate actions and biases, and therefore requires us to dedicate a greater amount of resources to remove them.

The deeply embedded inequities that exist within our school systems are the result of intentional decisions made by those with power and privilege. People came to those spaces with beliefs, biases, and assumptions that allowed for further marginalization of groups. Over time, they perpetuated deep levels of institutional racism working against marginalized groups. The vastness of these inequities is the primary reason to start now by reexamining systems within our control rather than waiting for change within the larger systems.

We know that to truly dismantle the oppressive systems within our society, change must occur at both micro and macro levels – within a district, throughout a state, and across our nation. People with good intentions, expertise, and actions have attempted to address these problems but have fallen short due to the enormous barriers around power, policies, and practices that have been in place for hundreds of years. Therefore, to achieve systemic changes to the structural racism within our education systems, we must change policies, practices, and the human factors behind power and decision-making.

We challenge you – individual leaders and teams – to start redesigning the school experience for marginalized students within your community as a way to start the eradication of these barriers across all levels. Pre-COVID, leaders would take months to plan and execute a school redesign. However, in this current climate there is a heightened need and urgency to ensure students can enter schools in the fall that have been responsively redesigned to meet their immediate needs. By engaging in the steps below, we hope schools can capture the opportunity to begin redesigning aspects of policies and practices within your buildings in an iterative but urgent manner. If your school is interested in rethinking systems outside of the immediate needs presented by the pandemic, there is also the opportunity to engage in a more complex redesign that will take more time and resources.

"Since we know that disturbance is required for change and there is no doubt that disturbance is happening as we speak, the question is, are we willing to use this opportunity to create the kind of educational system we want?"

- HUGH VASQUEZ, NATIONAL EQUITY PROJECT

DESIGN WITHIN YOUR SCHOOL'S LOCUS OF CONTROL

Some examples of marginalized groups are our Black and brown children, our students with disabilities, our ESL students, among others. While we are not presenting an exhaustive list of marginalized groups, we are acknowledging that **marginalization created by systems** will be determined based on factors of your school community and district. We argue that we can all work to redesign the student learning experience from within our locus of control. That work begins with adopting the mindset that we all have control and influence to dismantle our own internalized racism, the interpersonal racism that occurs between individuals within our school building, and the institution that is our school. We also acknowledge the

1) **size of the district,**
2) **level of autonomy of school leaders, and**
3) **guidance provided by state officials can alter aspects of your redesign.**

EXAMPLES OF MARGINALIZATIONS BASED ON

RACE:
Achievement gap between white students and all other races

LGBTQIA+:
Lack of access to spaces and opportunities that align with their identity

DISABILITY:
Gaps in instructional and curriculum materials for Special Education students

SOCIO-ECONOMIC STATUS:
Gaps in achievement for economically disadvantaged students

GENDER:
Achievement & opportunity gaps between gender identity groups in schools, such as access to math and science classes

The protocols within this paper are to support our call to action of all leaders within schools. We designed this process to:

- **be completed within your role or team's locus of control**

- **act as a starting point for responsive equity work in schools**

- **shift power in creating prototypes to address inequity**

We engage in dismantling systemic education inequities at Education Elements through a three-part methodology: **Connect, Include, Create**.

We also know and believe that any work around addressing inequity must start with oneself and a willingness to cede power depending on the privileges one holds. The steps below present strategies a school leader, or teams can use to *Start with Yourself and Cede Power*[1], in order to ***Connect, Include, Create.***

CONNECT

INCLUDE

CREATE

Step 0:

Start With Yourself & Cede Power

- Identify your own bias, power, and privilege in how you make decisions

Step 1:

Connect

- Define what system to address, the scope of change you are making, and for whom you are making the change
- Empathize with the identified school level challenge
- Determine if you are designing for impact, urgency, or ease

Step 2:

Include

- Bring voices to the table
- Empathize with the marginalized group
- Outline the success criteria for truly changing the system for equity

Step 3:

Create

- Create opportunities for voices at the margin to be included in the design process
- Design 2-3 prototypes with the marginalized group at the center
- Clear communication of the what (decision trade-offs), how (process used), and why (your reason for selecting the system for redesign)

STEP 0:

START WITH YOURSELF AND CEDE POWER

OUTPUTS OR OUTCOMES

- Identify your own bias, power, and privilege in how you make decisions

While systems are a product of design, they can be redesigned to better reflect the needs of all stakeholders. Redesign can only be successful in addressing inequities if the current designers **recognize, consider, and design** against the ways implicit bias, psychological bias, racism, power and privilege impact decision-making. Our identities are multi-faceted, and each part influences how you experience the world and the assumptions and biases you hold. As a society, implicit biases are so deeply ingrained in our social norms that we often cannot even tell that they are there. Your students might experience marginalization and oppression based on a variety of ideas that fuel oppression, including but not limited to discrimination based on race, sexual orientation, gender identity, religion, and socio-economic status. Race is one of the most prevalent root causes of inequity in the United States education system.

To begin to unpack racism at the **personal, interpersonal, and institutional levels,** we have compiled a series of readings and reflection questions for readers to explore. Create time and space to reflect on the following questions, both as an individual and collectively:

- **In what ways have my biases helped to maintain racism within my school?**
- **What are examples of interpersonal racism and how does it play a role in my interactions at my school?**
- **How does institutional racism live within our school?**

You can find a list of resources to learn from and to help you reflect on each of these anchoring questions. The goal is to strengthen your capacity to reflect and learn as individuals and a redesign team.

REFLECTION POINT

In going through the resources, did you experience any of the common pitfalls of deep personal equity work?

Feeling defensive or failing to acknowledge oppression
Not recognizing emerging emotions
Not voicing the emotions with your team
Excusing actions with good intentions
Doing the work in isolation

Return to these reflection points in future conversations to reflect and see how you've acknowledged these pitfalls in yourself and/or as a team.

As we encourage schools to reflect on their own practices we would like to offer examples of how we are engaging in these reflections as an organization. Our reflections will be included for each step of the process throughout the paper.

We have been helping schools design and implement Personalized Learning models for years. We prioritize utilizing empathy to understand the student experience which includes strengths, needs and interests. However, we have failed to acknowledge the undeniable impact of bias in design. Moving forward, we will prioritize reflecting on and exposing bias as part of the process to explicitly name the dynamics of power and privilege in creating classroom and school models.
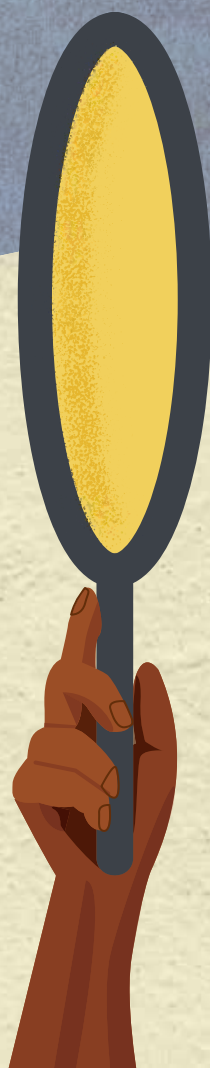
IN WHAT WAYS HAVE MY BIASES HELPED TO MAINTAIN RACISM WITHIN MY SCHOOL?

Great resources for learning how implicit bias impacts decision-making as well as your working and learning environments.

Implicit Bias Tests

What is my complicity?

"Challenging White Dominant Culture: Time to Look in the Mirror"

Internalized Racisms Definition + Internalized Racism Inventory

What is Internalized Racism Flipping the Switch

Color Blind or Color Brave

Brene Brown and Ibram X. Kendi - How to be an anti-racist

WHAT ARE EXAMPLES OF INTERPERSONAL RACISM AND HOW DOES IT PLAY A ROLE IN MY INTERACTIONS AT MY SCHOOL?

Be aware of the power and privilege that you bring.

Great resources available for white allies.

Deconstructing White Privilege

Well-meaning white people

Whistling Vivaldi NPR

White Privilege- Unpacking the Invisible Knapsack

Unpacking White Fragility

"The Surprisingly Racist History of 'Caucasian'"

Addressing Whiteness

Side effects of white women

Who gets to be afraid in America- Ibram Kendi

The Danger of a Single Story

28 Common Racist Attitudes and Behaviors

Great resources available for POC allies.

Non-Black POC start having conversations

Racisms has a cost for everyone

30 ways Asians perpetuate Anti-Black racism everyday

A History of Race and Racism in America, in 24 Chapters

The Racial Triangulation of Asian Americans

Timeline of Events that Led Up to 2020 "Fed Up" uprising

Getting Called Out and How to Apologize

Racial Equity Tools Glossary and Key concepts

Audre Lorde: "The Use of Anger: Women Responding to Racism"

HOW DOES INSTITUTIONAL RACISM LIVE WITHIN OUR SCHOOL?

Identify institutional bias of the school and district. Great resources available are….

What is systemic racism?

Intersectionality Wars

How studying privilege systems can strengthen compassion?

Moving the Race Conversation Forward

Deepening of Our Understanding of Structural Marginalization

The problem with othering: toward inclusiveness and belonging

Targeted Universalism Policy and Practice

ASCD 14 resources for culturally responsive teaching

Culturally Responsive teaching guide

CEDE POWER

Once you have gained self-awareness around your own implicit biases and beliefs, you are better positioned to cede power. When you enter a space, be aware of the power dynamics that exist within the context (Ask yourself, where and how do I hold power right now?) and make conscious efforts to **lift up the voices** that may not hold power in that space. Ceding power can be as simple as being the last one to offer an opinion during a staff meeting or allowing others to make final decisions on work they lead. One simple, but important way to practice ceding power, is creating space for those without power to provide feedback in a transparent way. As a principal, you can cede power by providing space for students, teachers, and parents to give authentic feedback (without fear of reprisal). For example, often our own preferences and beliefs as leaders will manifest into unspoken norms within the school that can morph into policies over time. It is important to uncover these **unspoken norms** around racist interactions within a school. In this example, you might ask staff,

"What do new teachers need to learn about our school or system through their onboarding that is not part of our handbook, PD, and written process?"

This will reveal a range of norms that you can then evaluate with an equity lens.

STEP 1:

CONNECT

OUTPUTS OR OUTCOMES

- Define the system you need to address, the scope of change you want to make, and whom you are making the change for
- Empathize with the identified school level challenge
- Determine if you are designing for impact, urgency, or ease

After identifying your own bias, power and privilege, you are now working to **connect with the specific system** for redesign, the scope in which you will be redesigning, and the targeted group for which you are redesigning. It will be important to continue to be self-aware of your power, privilege and biases so you can check your thinking and make intentional steps to uplift voices without power. To truly Connect with the challenge, a team must:

1. **Determine the information you need to collect**
2. **Decide from whom you need the information**
3. **Engage with stakeholders to identify your problem statement**

DETERMINE THE INFORMATION YOU NEED TO COLLECT

First, brainstorm the different systems that you want to redesign. We defined school-level systems as policies and practices regarding people, time, and money within a K-12 institution. Then, select data points around one area of historical inequity for different marginalized groups within your school based on the system you selected. Be sure to collect data to represent a variety of marginalized groups within your current system.

You can start defining these systems within your schools by asking yourself the following questions:

1. What are the gaps among the different sub-groups within your school?
2. How wide are the gaps in learning outcomes in your school? Are they narrowing or widening?
3. What changes have you made to reduce these differences in learning outcomes?

EXAMPLES OF POTENTIALLY INEQUITABLE SYSTEMS	Staffing/Master schedule Intervention structure Instructional models Grading Parent engagement Consequence/reward systems Student engagement Student safety
TOP RESEARCH BASED MARGINALIZED INEQUITIES IN SCHOOLS	Socio-economics status[3] Race[3] Age/ Grade[3] Ability groups[3] Instructional Tracks[4] Gender[4] School created social categories[4] Geography and mobility[5] LGBTQIA+ English Language Learners Students with Disabilities

You can find a chart of different data points aligned with the prioritized systems on the next page.

BIG ROCK	SYSTEM	MARGINALIZED GROUPS IMPACTED	DATA POINT
Cultural	Safety	• Students whose family structure (families led by a single parent, older sibling or grandparent) is not supported by the design of our systems and society • Students who return home alone • Students who are dependent on school transportation for school • Undocumented students • Students with disabilities • Students from poor and working-class communities, children raising/supporting younger siblings	• Family survey on choice of transportation • Students with chronic late pick-ups • Family contact preference • Instances of bullying • Number of students identified as "At Risk" by social worker • Number of students identified as McKinney-Vento
Cultural	Parent Engagement	• Parents with disabilities • Single-parent working families • Queer parents/guardians • Parents with language barriers • Parents working multiple jobs	• Attendance/ tardies • Referrals or discipline rates • Parent attendance for events • Communication log • Types of parent engagement activities
Operational	Staffing and Master Scheduling	• Underperforming students as determined by achievement and growth data • Students with lowest attendance rates • Students with disabilities • Students from working-class families and students raising/ supporting younger siblings • Students with jobs/ financial responsibilities for their families	• What is developmentally appropriate optimal learning time • Course offerings and selection • Attendance/ tardies • Prioritized decisions in creating the last master schedule
Instructional	Instructional Models for Personalized Learning	• Underperforming sub-group based on behavior and academic data • Classes with least culturally responsive curriculum • Students with unequal discipline data • English Learners • Student with disabilities	• Reading & math levels based on sub-population • SPED referrals • Referrals or discipline rates • MTSS support models • Stereotypes placed on kids
Cultural/ Instructional	Student Engagement	• Students with disabilities based on student talk time • Student who is behind academically (Level of DOK provided) • Students in classrooms where the content or teacher ostracizes them because of their cultural background, whether intentionally or unintentionally	• Attendance/ tardies • SPED referrals • Referrals or discipline rates • Minutes with targeted instruction ⟶ MTSS Tier 2 minutes • Stereotypes placed on kids • Intervention rosters

From your identified systems that you are interested in connecting with, begin to reflect on:
• *Is the system dictated by policy? (e.g. number of minutes required for a class)*
	• *If so, this may not be within your locus of control to redesign.*
• *Do you have autonomy over how the system is designed?*
	• *If so, seek to understand the assumptions and biases that the designer may have brought when creating the system.*

DECIDE FROM WHOM YOU NEED ADDITIONAL INFORMATION

Engaging with stakeholders through empathy activities will help to deepen your understanding of the data you collected and shed light on how previous decisions have helped to create the existing structure. You will also begin to build the trust needed to redesign the system which, in turn, will also allow you to center your redesign on the everyday, lived experiences and pain points on those for whom the systems are intended to serve. Lastly, empathizing with your stakeholders will help you determine the core challenge for which to solve. To engage stakeholders to collect this information and develop a deeper connection to core school challenge, consider using a combination of the following empathy activities:

INTERVIEW:
Interview some of your stakeholders impacted by the challenge. Begin your questions with sentence stems like "Tell me about…" in order to ask open-ended questions that invite people to tell stories. Use an empathy map to capture the learnings collected.

OBSERVATION:
Be a fly on the wall and observe your user. Take notes on the high and low points in their daily experience, or through the lens of your identified challenge.

IMMERSION:
Walk a mile in their shoes. A great immersion experience with students is the Shadow a Student Challenge, where you not only follow a student around for a day, but also participate in all of the same activities as the student. If they are doing math problems, so are you! If they are running in gym class, you are running alongside them.

It will be important to consider how you will build safe spaces for people to share their feedback. Not every stakeholder will be open about sharing right away, so consider giving people **multiple opportunities** as needed. You might also collect data from your school community in the form of surveys, focus groups, and town halls. Additional guidance can be found in our stakeholder engagement guide.

We recommend using the following list of considerations to determine the stakeholders with whom you should empathize:

- **Consider groups who often do not have a seat at the table**
- **Consider who consistently seizes and uses power in your community to make change**
- **Consider those groups that experience marginalization due to systemic inequities**
- **Consider your personal biases: who do you tend to involve in decision making, particularly when the timeline is short?**

REFLECTION POINT

Before, during and after discussions with various stakeholders, attempt to answer the following questions from their perspective:

1. For whom are these systems designed? Who do they exclude?

2. How does this system support and uplift the groups they were designed for?

3. How does the system negatively impact excluded or marginalized groups?

4. Why isn't this system working for the marginalized group? Why is it working for other students?

After empathizing with a variety of stakeholders across a range of empathy activities, take some time with your team to reflect on what you learned. We recommend using a protocol such as Rose, Bud, Thorn to process the information you have collected to narrow your redesign focus, prevent bias, and allow for equity of voice.

Throughout our process of helping schools implement Personalized Learning, we have focused on helping schools redesign instructional models anchored in empathy through interviews and the personas of students. However, we did not typically focus on designing explicitly with students at the margin and anchoring design decisions of schools around a variety of data of students at the margin.
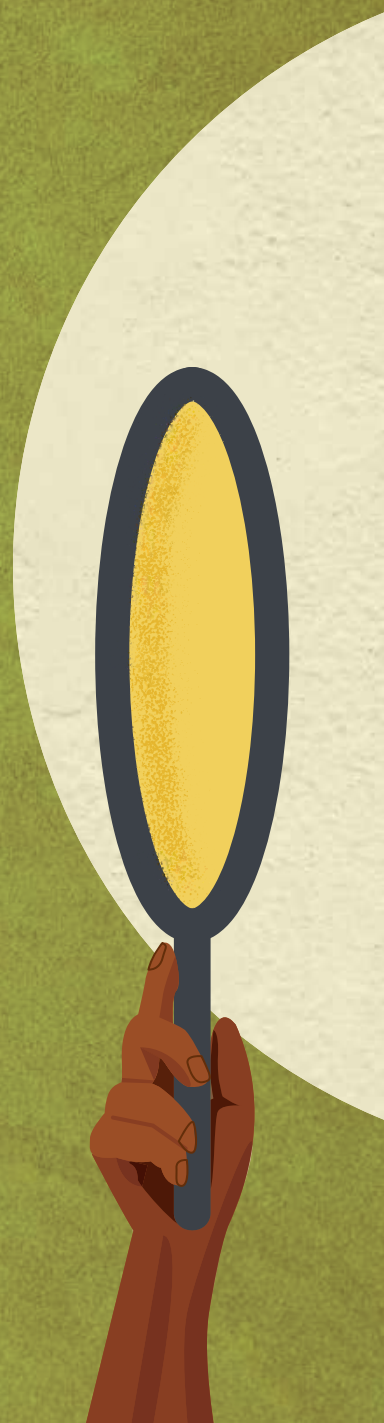
ENGAGE TO IDENTIFY YOUR PROBLEM STATEMENT

Consolidate the qualitative (empathy) and quantitative (school-level data) data points to create a list of 1-3 systems for redesign. Once you and your team have decided, prioritize the systems based on urgency, impact, and ease on a 2X2 matrix to define the scope of change.

URGENCY

During a crisis, we want to prioritize everything because it all feels urgent and we attempt to act on our many competing commitments. In this case, we encourage you to identify an entry point for redesign by focusing on the school-level system that is most urgent for your marginalized group. You can do this by determining the **dependency** (information or decision you need) and "**commit by**" timeline (the time when you decide to commit to a decision with the information you have) for each pressing decision point or system you are considering. Based on what you know about returning to school, you will be able to define the urgency of your decisions in each possible scenario of return:
If you are planning on
• **SCENARIO 1:** returning to school with no physical distancing, it might be the priority to plan to ensure the safety, physical and/or emotion, of your most marginalized students.
• **SCENARIO 2:** returning to school with significant physical distancing, it might be the priority for you to plan for how redesigned operations behind arrival/ dismissal/transitions or how the master schedule should look for your most marginalized students.
• **SCENARIO 3:** returning to school with an extension of distance learning, it might be the priority for you to redesign for how instruction and successful student engagement must look for your marginalized students.

EXAMPLE OF DEPENDENCY AND COMMIT BY:

DECISIONS	DEPENDENCY	COMMIT BY
Deploying 1:1 Devices	Budget adjustments	ASAP
Upgrading Network Capabilities	Legal consultation and budget adjustments	July 15
Distributing Lunch	Personnel	July 5
Transportation Services	School closure decision	August 1
Virtual Teacher PD	New school year	September
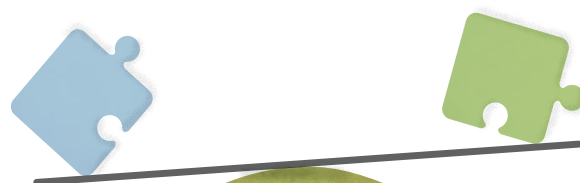
REFLECTION POINT
Use the following questions to help determine the system to prioritize for redesign:

• *What level of impact do we hope to have on our marginalized populations?*
• *Which system is most urgent based on our most likely return scenario?*
• *Which system should we prioritize?*

IMPACT

Our impact range falls from broad to targeted, meaning that no quadrant on our matrix represents low impact. Targeted impact highlights that the factor may be more impactful to a subset of students, in this case the marginalized group you identified.

This is okay.

Equity is not about giving everyone the same thing but giving everyone what they need. Do not be deterred by a priority that falls into "targeted" impact for marginalized students. By selecting a system that impacts your marginalized group, you are communicating equity as a priority for your school. It is also likely that items in the "targeted impact" section will address the needs of other stakeholders at the margins and work for those that fall in the middle.

Decide if the system creates impact:
• For a **targeted group** of marginalized students
    • Example: designing a master schedule by prioritizing special education student needs first before other decisions and inputs
• For a **broader group** of marginalized students
    • Example: designing remote classroom instructional models for students with the highest number of failing grades

EASE

Beyond the two considerations above, it is also important for your team to evaluate the **ease of redesigning** your chosen systems. Define ease relative to the various systems you are considering for redesign. Designing for ease allows for you to uncover feasibility, risk, and resource availability. It also highlights what priorities do not involve the creation of new systems and, as a result, can be addressed more swiftly. A system in which making small tweaks is done with a high degree of ease may not be the system to focus redesign efforts. A system that is highly difficult to change may fall outside of the locus of control of the design team and may be worth advocating for a systems level redesign, whether that is within your network or school district.

WRITING A PROBLEM STATEMENT

Considering the impact, ease, and urgency of your 1-3 systems should guide you towards one you would like to prioritize. The next step is to frame the system within its identified problem. Framing a problem enables your team to create solutions that are aligned with the needs that bubbled up in your data, while also allowing room for innovative solutions. Create your problem statement by defining the **scope of change** you are making based on **prioritization, data, and self-reflection**. A good problem statement sets clear guardrails without pre-determining a solution:

• **How might we create a safe learning environment within the hybrid learning model for our Black male students?**

PAUSE TO SHARE INFORMATION

• *Let your school community know why and how your chosen system was failing to serve and uplift all students.*
• *Share your problem statement and why it was crafted*
• *Explain who was the team, how they were engaged, why they were joined*

STEP 2:

INCLUDE

OUTPUTS OR OUTCOMES

- Bring voices to the table
- Empathize with the marginalized group
- Outline the success criteria for truly changing the system for equity

Now that you've identified and connected with your core redesign challenge within your school, it's important to take some time to consider whom you need to include in the process. You might be bringing **people onto the redesign team** based on engagements from the previous steps, you might be sourcing out key viewpoints that are missing from your team, or you might be looking to hear from underrepresented voices.

CONTINUE TO EMPATHIZE WITH USERS AT THE MARGINS

Too often, products, systems, and services are designed *for* rather than *with* the people they serve. Even when we design with the people for whom the system serves, we often make decisions based on ease, accessibility, and privilege. Therefore, we must design for **users at the margins**. Studies have shown that products designed for users at the margins will naturally serve users in the average or the middle. For example, handicap bathrooms were designed for a user at the margins (a person with a physical disability), but also serve a variety of needs for users in the middle (a person traveling with small children or with a lot of suitcases, as an example). Within the system and marginalized group you previously identified, begin to determine who you need to bring to the table to generate ideas and get targeted feedback on your challenge.

REFLECTION POINT

How do you decide who to bring to the table?
It's important to include the voices of those who are not only impacted by your challenge, but also the voices of those at the margins. When deciding who to bring together for thoughts and ideas consider:

• *Whose voices have been traditionally excluded from the conversation?*
• *Who are my users at the margins?*
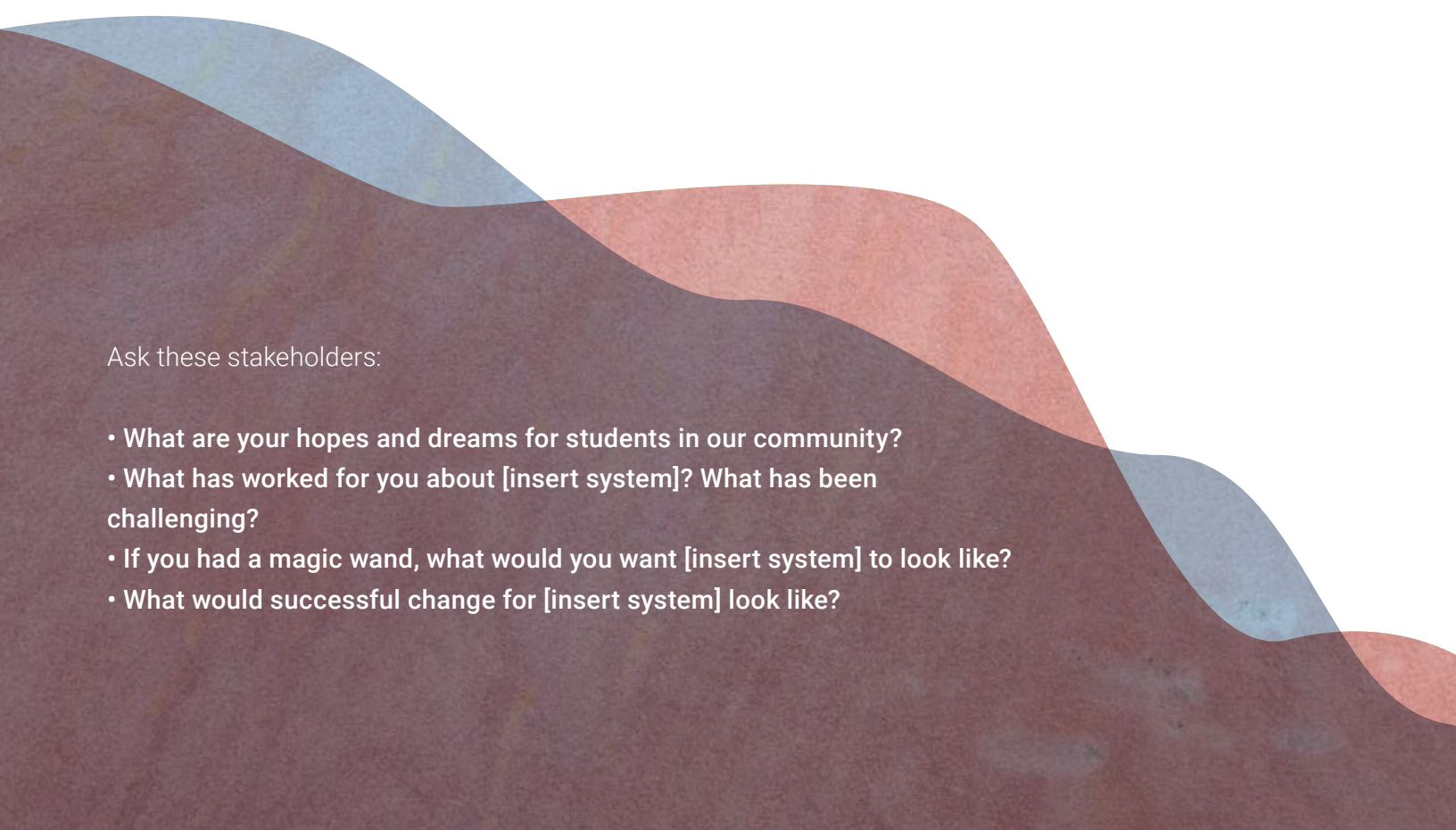• *Who has the system or challenge failed to serve?*

We recommended bringing together 6-8 people at a time, through focus groups or interviews, to better understand their needs and hear what an equitable system could look like. The compositions of focus groups should be of stakeholders you identified in **Connect**, particularly users at the margin or those who are traditionally excluded. Be intentional about how explicit groupings can either create or eliminate safety of voice within marginalized groups. People will not always feel empowered to speak up right away, so be **intentional** about how you create structures and multiple opportunities and ways for their voices to be heard. It is incredibly important to provide anchoring questions and space to brainstorm prior to hosting a focus group or interview. This avoids the pitfall of creating a space that places one or two individuals to speak on behalf of a group or create "new" ideas in a short time span, as well as support different processing styles. Be sure to also consider accessibility when choosing a time and place to meet with stakeholders. It might be the case that you need to meet outside business hours or meet stakeholders where they feel comfortable.

Ask these stakeholders:

• What are your hopes and dreams for students in our community?
• What has worked for you about [insert system]? What has been challenging?
• If you had a magic wand, what would you want [insert system] to look like?
• What would successful change for [insert system] look like?

When we build in empathy points within our Personalized Learning methodology, we use different protocols and experiences to help engage teachers and leaders with the student voice. In reflection, a higher leverage strategy to incorporate an equitable lens is to help our partners select marginalized students for the interviews and focus groups. Moving forward, we will include the voices of marginalized parents, community members, or school staff members to better understand how to personalize learning for their students.

With the information collected from the marginalized voices who are now seated at the table, you should have gained a clear understanding of the root causes and what it would look like for the system to work for them. Use this information to answer the following questions:

- **What did you hear as the root causes of inequity within the system?**
- **Why does this matter to your users at the margin?**
- **What does success look like in a redesigned system?**

PAUSE TO SHARE INFORMATION

- *Be open about the process you used to design for the users at the margins*
- *Share the learnings from empathizing with users at the margins*
- *State what success would look like in a redesigned system*
- *Share self-reflections on how the takeaways help you better understand your own biases, power and privilege*
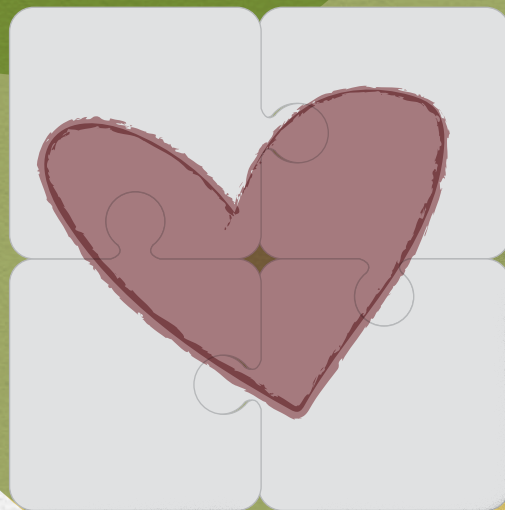
CREATE

OUTPUTS OR OUTCOMES

- Create opportunities for voices at the margin to be included in the design process
- 2-3 prototypes designed with the marginalized group at the center
- Clear communication of the what (decision trade offs), how (process used), and why (your reason for selecting the system for redesign)

By now you have a rich understanding of the root causes of your identified challenge and have been intentional about including marginalized voices in the conversation. The stakeholders that you have brought to the table around your challenge have given you some ideas and indicated what success would look like for them.

As you delve into **creating solutions and prototypes** for your challenge, first consider how you might continue to design *with* your users rather than *for* them. In some cases, you might even have them as a member of your central design team. However, we recognize there are many constraints that make this challenging. One way around this is to build in intentional **cycles and space for feedback and reflection** from these stakeholders around the solutions that you create.

GENERATE A DIVERSE SET OF IDEAS

Create a school design team, ideally people who have also engaged in the process from the start, to generate a set of ideas to solve for your challenge using the knowledge gained through **Connect** and **Include**. We recommend using a [brainstorming design protocol](#) to ensure that you are inviting ideas from all team members, regardless of the power that they may hold in that space. As your team generates ideas, encourage members to brainstorm based on impact or magnitude of change.

Ideas can be
• **Small tweaks within necessary next steps of guidance**
• **Big shifts limited within locus of control**
• **Aspirational changes outside of direct control but within influence**

AN EXAMPLE CHALLENGE:
How might we create a virtual master schedule to ensure success in engaging students with highest failure rates?

SMALL TWEAKS	• Taking the current master schedule and making small tweaks by translating many of the same processes from in-person to synchronous virtual learning • Provide students with highest failure rates with additional synchronous check-ins with teachers and staff members
BIG SHIFTS	• Taking the current master schedule and making shifts in creating both synchronous and asynchronous learning opportunities within the master schedule • Provide students with the highest failure rates options to engage in pace, path, place and point of contact. Consider offering students a choice about which teachers they connect with in virtual class or office hours and when. For example, an 8th grade student can sign up for or join the office hour with their math teacher from 6th grade
ASPIRATIONAL CHANGES	• Master schedules are created to alter the pace, path, place, and point of contact based on individual student needs to match learning styles with learning venues.

ITERATE THROUGH PROTOTYPES AND TESTING

From those ideas, choose your highest leverage solutions (we recommend choosing 2-3) for which to create prototypes aligned with your prioritization from Connect and test in a small way. When choosing which ideas to prototype and test, consider how they will work to redesign your challenge. We recommend using these guiding design principles (created by the EquityxDesign Collaborative[1]) and aligned questions to help you look at your prototypes with an equity lens:

- **Design at the margins:** Whom does this prototype serve? Whose needs are unaccounted for? Does this prototype create inclusion and belonging for marginalized stakeholders?
- **Make the invisible visible:** What assumptions might we be making as designers? Are we still upholding underlying systems of inequity?
- **Speak to the future:** Does this prototype promote new, equitable ideas or simply restate existing systems that were never designed to serve all students?

PITFALL	AVOID BY
SELECTING ONE PATH WITHOUT CONSIDERING MULTIPLE SOLUTIONS	• Prototype development with the goal of leaving with three options • Announce to stakeholders that they will evaluate three options to provide feedback
ONLY INCLUDING OR ELEVATING THE "USUALS"	• Establish dates for stakeholder feedback • Generate a list of stakeholders at the margins across a variety of identifiers (race, socioeconomic, English as a second language, etc.) • Acknowledge that you might feel discomfort engaging voices or perspectives that are not traditionally heard
LETTING THE LOUDEST VOICES LEAD	• Name the power and privilege that exists within the space and call on everyone to work towards equity of voice • Communicate who was involved in the decision-making process and their roles • Have all members confirm the final decisions using an objection/no-objection protocol
LOSING YOUR "WHY" ALONG THE WAY	• Keep the problem statement at the top of all produced documents and/or conversations • Be intentional about reflecting on how the solution upholds your values

TESTING YOUR PROTOTYPE

A key function of a prototype is to establish proof of concept – will this thing work the way we want it to? Therefore, prior to putting your prototype into action, establish a clear theory of action you want to test: **"IF...THEN..."** Coupled with the hypothesis, be sure to explicitly name what success will look like and what data needs to be collected throughout the testing process to support the hypothesis. Though your prototype was designed for users at the margins, we recommend testing with both users at the margins and those in the general population.

OUR EXAMPLE CHALLENGE:
How might we create a virtual master schedule to ensure success in engaging students with highest failure rates?

EXAMPLE THEORY OF ACTION

If we add in more synchronous check-in time with choice in pace, path, and point of contact for students with highest failure rates, then we will see increased engagement and higher academic success for those marginalized students.

Design teams can use the following protocol prior to testing:

- **We believe that (insert your theory of action)** _____
- **To verify that, we will (actions)** _____
- **And measure** _____
- **We are right if** _____

CLOSING THE EMPATHY LOOP: COLLECT AND PROCESS FEEDBACK

Finally, we recommend scheduling time to reflect on the implementation of the prototype, analyze the collected learning, and iterate on your design. In addition to data you collected during the testing of the prototype, be sure to solicit feedback from the users who participated in the testing as well as the stakeholders you identified in Include. Use this touchpoint to also close the empathy loop by returning to the different stakeholder groups from **Connect** and **Include** to ensure the prototype represents their needs. The feedback should be used to iterate on your prototype and conduct additional tests as needed.

A simple protocol you might use to debrief your test is an **After Action Review**:

• **We believed that (insert your theory of action)** _____
• **We observed** _____
• **From that we learned (what worked? What didn't work? why?)** _____

_____

A NOTE ABOUT SCALABILITY:

If you are using this paper to design for a challenge presented by COVID-19 for the fall, it may be the case that you've already designed a prototype and tested it at scale (Note that typically prototyping and testing initially occurs with small groups). If this is the case, it is imperative that you plan for more frequent cycles of feedback and reflection to make **responsive pivots** along the way, especially within the first few months. If this is not the case, your next step would be to determine how to scale your prototype idea(s).

REFLECTION POINT

As you enter and exit the testing stage, make sure to reflect individually and as a team to ensure you are elevating voices, diversifying perspectives, and meeting true needs.

1. *Have we solicited feedback from the stakeholders from Connect and Include?*
2. *Have we used the After Action Review to gather learnings to better inform progress against our theory of action?*
3. *Have we created a safe space for marginalized stakeholders to give adjusting feedback?*
4. *What potential bias may upholding the inequity of the old system?*

EDUCATION ELEMENT'S REFLECTION APPLIED TO PERSONALIZED LEARNING

An integral part of our methodology is reflecting and iterating through learning walks. Classroom visits and reflection sessions are used to serve as an After Action Review to learn what worked and what didn't work. However, we have not prioritized gathering data during learning walks explicitly around the students at the margin within the school. As our partners launch Personalized Learning within their schools, focusing on how we measure progress around marginalized students is one way for our work to evolve with an equity lens.

**SHARING INFORMATION: HARNESS THE FLOW AND
LET INFORMATION GO**

Once you finalized your design for rollout at the decided scale (continuing with small pilots, larger testing groups, or whole school), it will be important to be transparent and clear about why you are making changes and how the design was created. Based on our New School Rules, transparency requires the sharing of information, but information sharing alone does not mean transparency has been achieved. In communicating the process, prototypes and feedback, it is imperative that:

• **Information is shared before the expiration date (while it's still relevant)**
• **Information is shared to bring allies along and promote engagement**
• **Information is shared through diversified message, models, and tools**

Share **when** and **how** you plan to continue to collect feedback and pivot as needed, especially during the first month of implementation. When organizations fail to be transparent about their **why**, people will naturally fill in the gaps with their own assumptions, leading to cultural pitfalls such as rumors and broken trust. Beyond communicating the **why** and the **how**, it is also important to communicate the **what** from the design experience. Pieces of the what can include what were learnings along the way, what were key decisions that were made as a result of Connect and Include, as well as what changes were made based on stakeholder feedback. Sharing and communicating these aspects of change allows for the greater community to understand the decision trade-offs made by the design team as a result of the entire process.

REFLECTION POINT
Is my communication transparent and accessible?

1. Have I communicated important information three times in three different ways?
2. Are my communications accessible to all members of my school community (e.g. translated into multiple languages, variety of mediums and modes)?
3. Is there an accessible way for members of my school community to communicate feedback to the school?
4. Is communication transparent in sharing the why, how, and why from different perspectives?

CONCLUSION

We hope that this paper has given you the tools to begin to dismantle the systems of inequity within your school. This will be the start of a longer journey, and we encourage you to use these resources in a cyclical manner to chip away at these long-standing systems. Closely examining and redesigning policies and systems within your locus of control is an initial step. There will also be the hard work of shifting the spoken and unspoken beliefs and mindsets of the adults in your building beyond your leadership team and working to create shifts in the macro systems in which your school lives. However, all the deep work in which you engage will have an immeasurable lasting impact on the lives of your students. We are also engaging in this work as a company, and believe that it's our moral imperative to share our learnings with your districts moving forward.

Please connect with us as you are doing this work, so we can learn together to unpack best practices. Together we can achieve educational equity for all our students.

FOOTNOTE

[1]Hill, C., Molitor, M., & Ortiz, C. (2016). Equity x design: A Practice for Transformation. Retrieved February 26, 2020, from https://drive.google.com/drive/search?q=equity%20by%20design

[2] Many parts of this paper connects how leaders will need to utilize proven leadership modalities to lead through an equitable redesign. You can find more information on Education Element's leadership competencies here.

[3]Garcia, E., & Weiss, E. (n.d.). Education inequalities at the school starting gate: Gaps, trends, and strategies to address them. Retrieved July 02, 2020, from https://www.epi.org/publication/education-inequalities-at-the-school-starting-gate/

[4] Domina, T., Penner, A., & Penner, E. (2017). Categorical Inequality: Schools As Sorting Machines. Annual review of sociology, 43, 311–330. https://doi.org/10.1146/annurev-soc-060116-053354

[5] O'Day, J., & Smith, M. (1970, January 01). Quality and Equality in American Education: Systemic Problems, Systemic Solutions. Retrieved July 02, 2020, from https://link.springer.com/chapter/10.1007/978-3-319-25991-8_9

AUTHORS: CRYSTAL XU AND PURVI PATEL