Moving Toward Equity   
Technical Assistance Resources Overview

This *Moving Toward Equity Technical Assistance Resources Overview* provides Chief State School Officers and state education agency (SEA) staff with an overview of the *Moving Toward Equity* technical assistance tools and resources for assisting with the design and implementation of comprehensive educator equity plans. These tools and resources, developed by the Center on Great Teachers and Leaders (GTL Center), include materials for addressing three components specified in the federal Excellent Educators for All initiative:

* Reviewing data (Use the *Moving Toward Equity Data Review Tool.*)
* Engaging stakeholders (Use the Moving Toward Equity Stakeholder Engagement Guide.)
* Conducting a root-cause analysis (Use the Moving Toward Equity Root-Cause Analysis Workbook.)

# Moving Toward Equity Data Review Tool

(<http://www.gtlcenter.org/data_review_tool>)

The *Moving Toward Equity Data Review Tool* helps SEAs understand and assess equitable access data to support the root-cause analysis and, ultimately, the comprehensive educator equity plan itself. Assessment of state data is vital to determine the root causes behind the lack of access to effective teaching and leading for students from poor and minority backgrounds—and to address those challenges. The activities in this tool introduce relevant metrics, increase staff capacity for analyzing equitable access data, and provide tools to communicate what the data suggest about the equitable access challenges in your state.

This tool consists of three main sections that serve to increase SEA capacity to analyze and use equitable access data. These sections provide materials on:

* Considering equitable access example metrics
* Interpreting your state’s equitable access data
* Using your state’s equitable access data

### Section 1: Considering Equitable Access Example Metrics

This section provides guidance on how to start identifying and compiling existing data and assess its quality. It consists of three steps:

* **Step 1.1: Identify Equitable Access Metrics.** This step uses an *Equitable Access: Example Metrics* worksheet that lists a range of possible metrics and guides SEA leaders in considering which metrics to use. It focuses on which metrics are most meaningful for assessing equitable access, which metrics the state collects, which meaningful but not currently available metrics could become available, and which available metrics ought to be used in assessing equitable access.
* **Step 1.2: Analyze Data and Assess Quality**. This step uses the Excel file titled *Equitable Access: Sample Data*, the corresponding *Equitable Access: Sample Data Codebook*, and guiding questions to walk SEA leaders through the process of analyzing and assessing the quality of equitable access data.
* **Step 1.3: Create Equitable Access Metrics.** This step offers guidance on how to create, revise, or develop new metrics based on the two steps above.

### Section 2: Interpreting Your State’s Equitable Access Data

This section provides resources to build the capacity of SEA leaders to accurately interpret their state’s data and consider policy implications. It consists of two steps.

* **Step 2.1: Examine Available Data.** This step guides SEA leaders to take a deeper dive into the available equitable access data that they have selected.
* **Step 2.2: Connect Quantitative Data to Practical Solutions.**This step guides SEA leaders through connecting the data to challenges with the educator pipeline, recruitment, retention, or performance. It also helps SEA staff consider whether their equitable access challenges are most problematic across districts, across schools within districts, or across classrooms within schools. Finally, it guides SEAs in considering local education agency (LEA) needs regarding data collection and support.

### Section 3: Using Your State’s Equitable Access Data

This final section focuses on presenting data and using the data to support a root-cause analysis of these challenges. It consists of two steps:

* **Step 3.1: Review Methods for Displaying Data.** This step uses the *Equitable Access: Sample Data Displays* document to provide SEA leaders with options and examples for displaying their data―including bar charts, graphs, and tables. It also guides them through considering how to best present the data to stakeholder groups and in the comprehensive educator equity plan.
* **Step 3.2: Connect the Review of Data to a Root-Cause Analysis***.* This final step suggests conducting a root-cause analysis at the SEA level and with stakeholder groups.

As mentioned, the *Moving Toward Equity Data Review Tool* is accompanied by a few supporting documents, including the following:

* A list of example equitable access metrics and a spreadsheet of sample data to support the process of identifying, analyzing, and interpreting your state’s available data

Supporting document of example data displays and suggested approaches to presenting your state’s data visually

# Moving Toward Equity Stakeholder Engagement Guide

(<http://www.gtlcenter.org/stakeholder_engagement_guide>)

The *Moving Toward Equity Stakeholder Engagement Guide* helps SEAs to brainstorm and implement effective methods for authentically engaging key stakeholder groups in the design and implementation of their states’ comprehensive educator equity plan. Successful engagement of stakeholders not only is a requirement of the Excellent Educators for Allinitiative but also is vital to ensure that the state educator equity plans generate the public and political will and collaboration needed to result in every child’s access to effective teaching. The step-by-step process outlined on pages 3–5 of this overview is based on the GTL Center’s companion [*Moving Toward Equity*](http://www.gtlcenter.org/learning-hub/moving-toward-equity) online tool (<http://www.gtlcenter.org/learning-hub/moving-toward-equity>). The framework of the *Moving Toward Equity* tool, illustrated in Figure 2, indicates five steps for moving a state from its current status to one in which equitable access to effective teaching exists.

Figure 2. The *Moving Toward Equity* Framework



This guide consists of two parts that guide SEAs in engaging stakeholders through short- and long-term planning for equitable access. **Part 1** guides the SEA in getting started and envisioning the process for its unique state context:

* **Step 1.1: Building an Internal SEA Team.** This step summarizes the internal SEA team’s composition and responsibilities and provides key steps to building an effective team.
* **Step 1.2: Creating a Big-Picture Vision.** This step guides the internal SEA team in establishing a big-picture vision for planning for equitable access and also provides sample vision statements.
* **Step 1.3: Identifying Stakeholder Groups.** This step provides tips for selecting stakeholder groups from across the education spectrum.
* **Step 1.4: Envisioning the Mechanisms for Engaging Stakeholders.** This step suggests a variety of possible formats for successful stakeholder engagement.
* **Step 1.5: Envisioning How Best to Prepare Stakeholders for Engagement.** This step helps SEA leaders make the most of stakeholders’ time and knowledge by familiarizing them in advance with the relevant issues and data.
* **Step 1.5: Envisioning a Long-Term Educator Equity Coalition.** This step provides information for creating and maintaining a coalition to support educator equity.
* **Step 1.6: Planning for Stakeholder Engagement: A Recommended Approach.** This step details a recommended approach to the process of engaging stakeholders on educator equity, from start to finish.

**Part 2** of the guide provides guidance for SEA staff to take action on stakeholder engagement. It walks SEA staff through the five steps of *Moving Toward Equity* framework, offering guidance and supporting resources for engaging stakeholders each step of the way.

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| C:\Users\ESherratt\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Word\14-1617 MovingTowardEquity_Understanding.jpg | **Step 2.1: Engaging Stakeholders in Understanding the Problem.** The SEA gives stakeholders an opportunity to examine the relevant metrics used to measure equitable access and determine what these data suggest about students’ access to effective teaching and leading in the state. Stakeholders will gain a clear understanding of the problem. Topics and materials include:   * **Data Profileand Other Tools for Developing Equitable Access Metrics.** Menu of metrics; sample data display tools; and guiding questions for analyzing, displaying, and considering your state’s equitable access data. * **PowerPoint Template.** Template for a presentation of background information to stakeholders. * **“Taking the Temperature” Activity Template.** Assessment of each stakeholder group’s existing knowledge of the issues of equitable access. * ***Moving Toward Equity Data Review Tool.*** Companion resource to help SEAs understand and assess equitable access data to support the root-cause analysis and, ultimately, the comprehensive educator equity plan itself. |
| C:\Users\ESherratt\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Word\14-1617 MovingTowardEquity_Setting.jpg | **Step 2.2: Engaging Stakeholders in Setting Priorities.** This step provides resources for conducting a root-cause analysis. It enables stakeholders to take stock of existing educator effectiveness policies and initiatives and then share perspectives about equitable access priorities. Topics and materials include:   * ***Moving Toward Equity Root-Cause Analysis Workbook: A Guide for State Education Agencies***Workbook for SEA staff to think through the underlying reasons why equitable access challenges persist. * ***Engaging Stakeholders in a Root-Cause Analysis.*** Companion resource that offers a step-by-step approach to directly engaging stakeholders in a root-cause analysis activity. * **Talent Development Framework Needs Assessment.** Approach to inventorying the existing educator effectiveness policies and initiatives. |
| C:\Users\ESherratt\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Word\14-1617 MovingTowardEquity_Raising.jpg | **Step 2.3: Engaging Stakeholders in Raising Awareness.** This step provides resources for the SEA and its stakeholder groupsto raise awareness in a coordinated fashion, widely within their networks, and to further gather stakeholder input in the process. Topics and materials include:   * **Developing a Communication Plan for Key Stakeholders and Wider Audiences.** Suggestions for maintaining strategic communication, including identifying audiences and mechanisms for communication, developing key communication messages, and monitoring communication efforts. * **Building Communication Loops**. Suggestions for developing two-way, continuous feedback loops. |
| C:\Users\ESherratt\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Word\14-1617 MovingTowardEquity_Taking.jpg | **Step 2.4: Engaging Stakeholders in Taking Action.** This step provides resources that help stakeholders provide input into the actionable strategies that will be included in the state’s teacher equity plan. Topics and materials include:   * **Focus Group Discussion Templates.** Explanation of “choicework” as a method for managing sensitive or contentious topics of discussion. * **Example of a State Equity Plan.** Sample equity plan for your state to react to when building your own plan. * **Build-Your-Own Equity Plan.** Mechanism to obtain quantitative information about stakeholder priorities on the most meaningful equitable access metrics as well as the strategies for addressing equitable access that respond to the root causes and are realistic within the state context. * **Incorporating Stakeholder Feedback―Discussion Planning, Recording, and Summary Forms.** List of suggestions for collecting feedback, and a step-by-step guide to ensuring that stakeholder insights are incorporated into the plan and communicated back to stakeholders systematically*.* |
| C:\Users\ESherratt\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Word\14-1617 MovingTowardEquity_Measuring.jpg | **Step 2.5: Engaging Stakeholders in Measuring Progress and Adjusting Strategies.** This step provides resources to allow stakeholders to provide ongoing input over time as the SEA measures progress and adjusts strategies. |

The *Moving Toward Equity Stakeholder Engagement Guide* is accompanied by a number of supporting documents, including:

* Resources for stakeholder engagement meetings (e.g., discussion materials, handouts, PPT template, sample meeting agendas)

Additional planning worksheets, examples, sample timelines, and tools for incorporating stakeholder feedback

Suggestions for developing a guidance document for engaging local stakeholders

For updates and new resources, please check the Center on Great Teachers and Leaders website (<http://www.gtlcenter.org/>), specifically the *Stakeholder Engagement Guide* webpage (<http://www.gtlcenter.org/learning-hub/equitable-access-toolkit/stakeholder-engagement-guide>).

# Moving Toward Equity Root-Cause Analysis Workbook

(<http://www.gtlcenter.org/root_cause_analysis>)

The *Moving Toward Equity Root-Cause Analysis Workbook* supports SEA leaders as they pinpoint the root causes of inequitable access to great teaching and leading and then identify a theory of action to target multiple strategies toward addressing the root causes in their state. The interactive brainstorming activities in this workbook will position states to build plans that foster long-lasting change.

The workbook consists of eight steps:

* **Step 1: Specify the Challenges to Be Addressed.** This step asks the SEA team to brainstorm a list of equitable access challenges facing their state, incorporate data, and isolate one particular challenge that seems to be the most prominent or immediate.
* **Step 2: Identify Root Causes.** This step asks the SEA team to brainstorm the root causes of the most prominent challenge identified in Step 1. The SEA team must dig deep down through the challenge by thinking beyond the symptom of the challenge.
* **Step 3: Categorize the Causes.** This step asks the SEA team to group together the root causes (identified in Step 2) into categories.
* **Step 4: Visualize Your Causes and Categories.** This step requires the SEA team members to illustrate their brainstorming power by grouping causes by category on a fishbone diagram to address the challenge from Step 1.
* **Step 5: Determine Strategies for Educator Talent Development.** This step asks the SEA team to brainstorm specific strategies for educator talent development that would address the categories of causes, building from Step 3 and Step 4.
* **Step 6: Create a Theory of Action.** In this step, the team selects a strategy from Step 5 and builds a theory of action diagram by thinking through the following boxes: (a) policy or funding levers you need to pull to implement the strategy, (b) comprehensive strategy for addressing the root cause, and (c) successful outcome after the root cause of inequity is addressed.
* **Step 7: Determine How to Measure Progress.** Using the theory of action diagram from Step 6, this step asks the SEA team to think strategically about assessing progress on how well the theory of action unfolds. It also provides a table of short-and long-term outcome measures to guide the team’s approach to measuring progress from one month of intervention through two years of intervention.
* **Step 8: Put Your Equity Plan Into Motion.** In the final step, the SEA team is prompted to think through the best ways to move the action plan forward. This task involves sharing the vision, garnering support, and taking action with stakeholder groups.

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| **Direct Technical Assistance**  GTL Center staff are available to provide technical assistance to regional centers and SEAs in each of these three components. In addition, GTL staff are able to review states’ draft comprehensive educator equity plans as well as connect states with one another to share ideas and lessons learned during and after the development of the educator equity plans. For more information about these tools or to request technical assistance, please contact Ellen Sherratt at esherratt@air.org. |