



Success Gaps Handbook: Addressing Equity, Inclusion, and Opportunity

Authors: Nancy O'Hara, Tom E. Munk, Heather Reynolds, Tanya Collins



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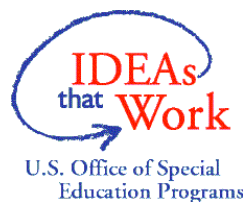
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Overview

The *Success Gaps Handbook: Addressing Equity, Inclusion, and Opportunity* (hereafter referred to as the *Success Gaps Handbook*) is part of the overarching resource, *Success Gaps Toolkit: Addressing Equity, Inclusion, and Opportunity* (hereafter referred to as the *Success Gaps Toolkit*). The IDEA Data Center (IDC) developed the *Success Gaps Toolkit* to support district or school leaders in conducting a root cause analysis when there are inequitable outcomes among groups of students or success gaps, which are differences in one or more outcome measures between groups of children in a district or school. Root cause analysis is the process of discovering the root causes of problems in order to identify appropriate solutions. By taking a closer look at their educational system to prevent or address problems such as success gaps, district or school leaders work to ensure an equitable education for all children. There are three goals for engaging in this process:

1. to discover the root cause of a success gap;
2. to fully understand how to address, compensate, or learn from any underlying issues within the root cause; and
3. to apply what is learned from this analysis to systematically prevent future issues.

KEEP IN MIND

The *Success Gaps Rubric* is an important part of the larger *Success Gaps Toolkit* located on the IDC website. The rubric, along with other sources of data, can be leveraged to identify the root causes for any identified success gaps.



The *Success Gaps Handbook* provides the same materials and resources that are included with the *Success Gaps Toolkit*, but in a printable format. The handbook also provides background information about the toolkit as well as the *Success Gaps Rubric: Addressing Equity, Inclusion, and Opportunity* (hereafter referred to as the *Success Gaps Rubric*), which is a key component of the toolkit.

Examples of how states, districts, and schools may use the success gaps materials include the following:

- A state education agency (SEA) may use the materials to help a district focus on success gaps and their causes within the district. Some states will use the materials as part of their work with underperforming districts, districts with school climate challenges, or districts identified with disproportionality.
- Districts or schools may use the materials if their state's accountability system identified the district or school as needing improvement. Such areas for improvement include low academic performance or a specific achievement gap between groups of children.
- Even without the SEA involvement, districts or schools may also use the materials when they have identified a need for improvement and a success gap between groups of children.

Success Gaps Toolkit Materials

The toolkit includes informational documents and templates designed to support a team of stakeholders—referred to throughout this process as the equity team—to address the identified success gap(s). These materials make up the handbook appendices, which are described in the next section.

Other materials in the toolkit include the following:

- **Success Gaps Rubric.** The materials and resources in the toolkit work in tandem to assist districts and schools in using the *Success Gaps Rubric*. Districts and schools can use this rubric to assist equity teams with their in-depth review of the district’s or school’s practices in delivering a high-quality instructional program for all children and to support identifying root causes of a success gap.

To access the rubric, go to <https://ideadata.org/resources/resource/133/success-gaps-rubric-addressing-equity-inclusion-and-opportunity>.



- **Priority Setting Tool.** After completing the *Success Gaps Rubric*, equity teams can use this tool to summarize their findings and determine priority areas.
- **Facilitation tools: Customizable meeting agendas and corresponding PowerPoints.** The toolkit contains customizable meeting agendas and corresponding PowerPoints for each step in the success gaps process that equity leads may use at meetings. These facilitation tools are fully customizable, as equity teams may need to combine meetings or split meetings into multiple sessions to accommodate the pace, information gathering, discussions, and decisionmaking of the group.
 - Customizable agendas: For each meeting, there are two types of agendas: a facilitation agenda and an equity team agenda. When customizing one of these agendas, be sure to make the same changes in the other agenda.
 - Facilitation agenda (indicated by a green header): The facilitator and other equity team leads can use the facilitation agenda to prepare for and plan meetings. This agenda includes the suggested activities and materials needed as well as notes or suggestions for facilitating the group. Preparing a thorough facilitation agenda helps meeting leaders think through the details of the entire session.
 - Equity team meeting agenda (indicated by a blue header): The equity team meeting agenda should be shared with all participants in the meeting. This succinct agenda provides participants with the topics addressed during the meeting and includes a proposed time frame and activities. Leaders provide this type of agenda to team members to share information efficiently and provide scope for the discussion.
 - Corresponding PowerPoints: For each meeting agenda, a PowerPoint is available that corresponds to that step in the success gaps process. Facilitators and equity team leads can customize these PowerPoints with their team-specific data or other information.
- **Additional supporting resources.** These resources will help you to dig deeper into the issues that may contribute to success gaps and equity in general to support your work in addressing success gaps.

Organization of the Handbook

Similar to the process outlined in the *Success Gaps Toolkit*, the *Success Gaps Handbook* is broken down into the following sections.

- Introduction
- Assemble an Appropriate Team
- Prepare and Share Data About the Success Gaps
- Determine Actionable Root Cause(s)
- Create an Action Plan
- Implement Plan and Monitor Progress

The appendices contain supplemental resources and materials that are referenced throughout the *Success Gaps Toolkit* and *Success Gaps Handbook*.

- [Appendix A](#) provides a broad overview of a success gap and of the process outlined in the *Success Gaps Toolkit*.
- [Appendix B](#) contains a form with the different roles of the equity team member representatives that leaders can use when assembling their team.
- [Appendix C](#) contains a sample invitation to equity team members.
- [Appendix D](#) contains a form for assigning organizational meeting roles to equity team members.
- [Appendix E](#) provides an example of group norms for equity team meetings.
- [Appendix F](#) contains a template for recording equity team meeting notes.
- [Appendix G](#) contains a template for refining the initial success gap statement.
- [Appendix H](#) outlines the steps for completing the *Success Gaps Rubric*.
- [Appendix I](#) provides a template for developing a success gap action plan.
- [Appendix J](#) contains a checklist of action items.

Introduction

What Is a Success Gap?

We define a success gap broadly as a difference in one or more outcome measures between groups of children.¹

These differences can take many forms. **Examples include the following:**

- At Tubman Elementary, Black children receive 10 or more days of in-school suspension at three times the rate of children of other races and ethnicities.
- At Keller High School, children with disabilities graduate with a diploma at half the rate of children without disabilities.
- In the Jonesboro school district, 40 percent of children who are Hispanic score proficient in the state mathematics exam in fourth and eighth grades, while 75 percent of children of all other races and ethnicities score proficient.

Success gaps signal that the system has failed the group(s) of children who are experiencing the gap. Success gaps are not about an individual child or a group of children's failure to perform. Rather, the responsibility for success gaps is centered in the structural components of education (and other) systems that have failed to provide equitable opportunities for some groups of children, such as Black, Indigenous, and People of Color (BIPOC); English learners; children with disabilities; or children experiencing poverty.

Children in these groups frequently experience *opportunity gaps*: the unequal or inequitable distribution of resources and opportunities. Equity requires that students receive the quantity and quality of resources they need, even if it's different from what other students need and receive. Opportunity gaps, like disparate access to high-quality early childhood programs and health care, are present early in life, often before a child enters school (Stark 2016).

In schools where the general education population is successful, all children are more likely to do well. Conversely, when the educational system does not effectively support marginalized students, a never-ending cycle is created where these children are continuously marginalized, and they continue to perform poorly (Gay 2002). Unequal access to high-quality core instruction beginning in early childhood and early elementary may be one reason for a system to identify some children as in need of special education services and subsequently place them in separate classrooms (Save the Children 2015). Indeed, research indicates that all children can benefit from evidence-based core instructional practices. Researchers have found that the achievement of PreK-12 children with disabilities and that of their general education peers is tightly linked (Hehir, Grindal, and Eidelman 2012; Malmgren, McLaughlin, and Nolet 2005).

¹ The success gaps materials use the term "children" to apply to preschool children through secondary-age students.

Why Do Success Gaps Matter?

If your school or district data show success gaps, it may indicate that the educational program it offers is not meeting the needs of all groups of children. When success gaps are allowed to continue, these gaps often result in poor outcomes for children in the affected groups. These poor outcomes may include the following:

- increased dropout and lower graduation rates;
- lack of achievement in reading or math;
- decreased postschool outcomes such as employment rates and college completion;
- increased likelihood of disciplinary actions; and
- increased likelihood of identification of a disability.

Gaps can exist between different racial/ethnic groups or relate to factors such as disability, English learner status, low income, migrant status, and other factors. Addressing success gaps requires a close look at issues of equity, inclusion, and opportunity. It is important to conduct this in-depth analysis across all groups of children throughout a school or district, especially those struggling academically or behaviorally.

[Appendix A](#) of this handbook contains a one-page summary of what a success gap is and why it matters.



About the *Success Gaps Toolkit*

IDC developed the *Success Gaps Toolkit* to assist educational leaders in pinpointing the true cause of the success gap(s) so that they can engage in proactive actions that will eliminate future issues. Part of these actions include engaging in effective practices. The *Success Gaps Toolkit*, which includes the *Success Gaps Rubric*, was developed around reviewed research that points to seven essential elements or practices that support equitable opportunity for all children. Research indicates that when these essential elements are in place within an educational system, children and youth are more likely to have an equitable opportunity to achieve and make educational progress.

The seven essential elements providing the foundation for the *Success Gaps Toolkit* are described in the following table:



Essential element	Key points	References
<p>1. Data-Based Decisionmaking</p>	<ul style="list-style-type: none"> • Educational leaders base decisions about school curricula, instructional programs, academic and behavioral supports, and school improvement initiatives on disaggregated data for the school, reflecting the differences in subgroups by gender, race/ethnicity, socio-economic factors, disability, and native or home language. For example, data on graduation, attendance, dropout, discipline, and achievement are all examined and considered individually and collectively. • Educational leaders base decisions about child and student interventions (behavioral and/or academic) on multiple data sources, including screening, progress monitoring, and formative and summative assessment data. • Educational leaders review and disaggregate data regularly to compare progress for all subgroups of children and youth. 	<p>Hamilton et al. 2009; Keuning et al. 2019; Lai and McNaughton 2016; van Geel et al. 2016; van Kuijk et al. 2016.</p>
<p>2. Cultural Responsiveness</p>	<ul style="list-style-type: none"> • Effective academic and behavioral practices for all learners are based on a school’s recognition of the diversity across student ethnicity, language, and socio-economic status. • Schools and districts provide and design ongoing professional development and resources so teachers and other staff can meet all children and youth’s cultural and linguistic needs, including students with disabilities who are also English learners. • Schools and districts invite, value, and welcome the participation of all families that are part of the diverse school community and adapt to the culture of the community. • Schools and districts include families from all backgrounds in discussions and meetings about the school, the school programs or initiatives, and their children’s academic and behavioral progress. 	<p>Bal 2018; Francis et al. 2016; Gay 2002; Henderson and Mapp 2002; Jeynes 2017; Klingner et al. 2005; Powell et al. 2016.</p>



Essential element	Key points	References
<p>3. Core Instructional Program</p>	<ul style="list-style-type: none"> • There is a rigorous, consistent, and well-articulated PreK-12 instructional program (i.e., curriculum and instructional delivery) aligned with both English language arts and mathematics standards and delivered with fidelity. • In addition, there is a comprehensive, well-articulated, district-level school discipline policy that is culturally sensitive to the school’s diversity. This policy requires positive, proactive, and restorative strategies focused on keeping children engaged and in school. • All children receive high-quality instruction that utilizes research-based practices, higher-order thinking skills, flexible grouping, and instructional technology. Universal Design for Learning guidelines are an integral component of the instruction. Thus, effective differentiation in the core curriculum addresses the needs of the full range of learners, learning styles, and cultural and linguistic backgrounds. • Schools and districts believe that families are an integral component of instruction. Therefore, schools and districts inform families, in their primary language, about the core instructional program and the differentiation of instruction and assessment data based on their child’s unique learning or behavioral needs. 	<p>Childs et al. 2016; Huberman, Navo, and Parrish 2012; Jaynes 2017; Jorgensen, McSheehan, and Sonnenmeier 2009; Newmann et al. 2001; Oyen and Wattersheim-Shervey 2019; Puzio, Colby, and Algeo-Nichols 2020; Tomlinson et al. 2003.</p>

Essential element	Key points	References
<p>4. Ongoing Assessment— Universal Screening and Progress Monitoring</p>	<ul style="list-style-type: none"> • Universal screening is available for all PreK-12 children and youth to identify early developmental, academic, or behavioral risk factors using valid and reliable measures. • Furthermore, each school has identified and uses valid and reliable progress-monitoring tools to support data collection to examine student growth. • Schools define and implement reasonable and regular intervals for monitoring, which allow staff to review performance data and make adjustments to instruction/interventions based on data review cycles. • Schools have processes in place to regularly inform families, in their primary language, of their child’s screening and progress-monitoring results for academic and behavioral progress and how those results are being used to support their child’s progress. 	<p>Brosnan et al. 2018; Fuchs and Fuchs 2002; Huberman, Navo, and Parrish 2012; Jorgensen, McSheehan, and Sonnenmeier 2009; Reedy and Lacireno-Paquet 2015; U.S. Department of Education 2015; U.S. Department of Education 2017; Wilcox, Gregory, and Yu 2017.</p>
<p>5. Evidence-Based Instructional and Behavioral Interventions and Supports</p>	<ul style="list-style-type: none"> • Evidence-based, culturally sound academic and behavioral interventions and supports, in addition to the core instruction, are embedded within a multi-tiered framework and implemented with fidelity. • Schools regularly inform and consult families, in their primary language, about culturally appropriate interventions provided to their children and their children’s responses to those interventions for academic and behavioral skills. 	<p>Benner et al. 2010; Bradshaw, Waasdorp, and Leaf 2015; Griffiths et al. 2007; Dignity in Schools Campaign 2019; Gage et al. 2018; King-Brown et al. 2013; Lassen, Steele, and Sailor 2006; National School Boards Association 2013; U.S. Department of Education 2014; Zambrana et al. 2019; Jeynes 2017.</p>

Essential element	Key points	References
6. District/School Leadership That Facilitates Improvement	<ul style="list-style-type: none"> Leadership that promotes equitable practices directly affects the culture and climate of the district and school, the motivation of teachers to implement innovations, and the use of data-based decisionmaking. This type of leadership is key to leading improvement in student achievement. In the Success Gaps Toolkit, leadership is incorporated into the process as a role model and leader of equitable practices. 	Sun and Leithwood 2012; Liebowitz and Porter 2019; Zuckerman et al. 2018; Schildkamp et al. 2019; Thornton, Zunino, and Beattie 2020.
7. Parent/Family Engagement Throughout the Education Process and System	<ul style="list-style-type: none"> Engaging families and the community in all school activities and decisions and in their child's education creates a welcoming and equitable educational environment. When families and schools partner to support children, both behaviorally and academically, children's outcomes improve. In the Success Gaps Toolkit, family engagement is embedded in the process and in every section of the <i>Success Gaps Rubric</i>. 	DeSpain, Conderman, and Gerzel-Short 2018; Francis et al. 2016; Pemberton and Miller 2015; Smith et al. 2019.

How Does the *Success Gaps Toolkit* Help?

Districts and schools can identify success gaps by examining how well the district or school provides the children it serves with the kinds of experiences that allow them to thrive.

The process outlined in the *Success Gaps Toolkit* assumes that the system has failed the group(s) of children who are experiencing success gaps. The toolkit includes materials and resources for helping a district or school address success gaps by identifying root causes and developing an action plan to reduce success gaps. This approach focuses on improving systems and avoids the perception that children need “fixing,” instead centering responsibility on the systems in education (and other systems) that failed to provide equitable opportunities for some groups of children. The *Success Gaps Toolkit* supports school and district teams to answer questions such as the following:

- Does the curriculum have cultural meaning and match the lived experience of all student groups?
- Is there instructional differentiation to support diverse learning needs?
- Are discipline policies misapplied, resulting in missed instruction?

Specifically, districts or schools will examine the differences in opportunities that the group of children identified with a success gap (e.g., children who are migrant, children with disabilities, Black children, Hispanic children) have experienced and the differences in the outcome area where the gap is occurring

(e.g., graduation rates, reducing suspensions, mathematics proficiency, or special education disproportionality).

To successfully address the success gaps, your district or school will need to assemble an equity team. This team will meet during regular intervals to identify the root cause(s) of the success gap and problem-solve strategies to address the success gap. Teams will use the resources in the *Success Gaps Toolkit* to help navigate through the process.

Whether initiated at the state, district, or school level, the toolkit will help you look carefully at the success gap you've identified and more fully understand the reasons that a particular group of students has more or fewer opportunities, resulting in different outcomes in the area where a success gap is identified. If your district or school has not yet identified a gap to work on, you may need to first review other tools or processes that help you look at and interpret your data, such as the *Data Meeting Toolkit*, available at <https://www.ideadata.org/data-meeting-toolkit>.

The Success Gaps Process

The *Success Gaps Toolkit* is a systems-focused continuous improvement process, as symbolized in the graphic. At the center of the process is the identified success gap.

Defining (1) the particular groups of children affected and (2) the specific outcome area are essential first steps that district and school leaders should take to identify any success gaps. Once district or school leaders identify a success gap, they can then develop an initial success gap statement that the equity team will later refine.

A success gap statement is a clear statement that summarizes the important information about the success gap for which the equity team will be working to identify underlying root causes. The initial success gap statement should contain three key pieces of information: (1) the group(s) of children, (2) the outcome area, and (3) the supporting data.



Following are examples of initial success gap statements:

- In Elm County, Native American children are 50 percent less likely than their peers to test proficient in English language arts and mathematics at all tested grade levels.
- In River City Schools, White children are 4 times as likely as children of other races and ethnicities to be identified with autism.
- In a Jasper County preschool program, children with disabilities who are Black develop social/emotional skills comparable to same-age peers at a rate that is 50 percent that of White children.
- In Lee County Schools, English learners with disabilities are 3.5 times as likely as non-English learners with disabilities to be placed in a separate school.
- In Wilson County, the high school graduation rate for children who are economically disadvantaged is the lowest in the state and is less than half the rate of the county's noneconomically disadvantaged children.

Once district or school leaders have identified an initial success gap, they are ready to engage in the root cause analysis process outlined in the *Success Gaps Toolkit*, working through these steps:

1. Assemble a team with the right people at the table to make decisions and have information about the problems. Discuss the problem by identifying and analyzing symptoms.
2. Prepare, share, and analyze multiple sources of data about the success gap to uncover details needed to refine your success gap statement.
3. Identify and validate root causes of the success gap and prioritize actionable root causes through use of the *Success Gaps Rubric*, other data sources, and discussion at team meetings. Determine if the team's original hunches are fact or fiction.
4. Develop an action plan to address prioritized root causes.
5. Implement the plan and monitor progress on an ongoing basis using data and the team to revise as needed.

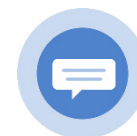
Assemble an Appropriate Team

No one person working alone can address long-standing systemic inequities in an educational system. Moreover, because equity work touches so many parts of a district or school, it frequently requires working across departments and schools. To successfully address the success gaps, your district or school will need to assemble an equity team. There are five crucial items for you to consider and act upon when building this equity team: mission and goal, roles and responsibilities, effective group processes, ground rules, and decisionmaking.



KEY TERMS

Equity team, also referred to as just “team” in this toolkit, refers to a representative group of individuals assembled together to problem-solve long-standing systemic inequities in an educational system.



Mission and Goal

When leaders recruit potential equity team members, it is essential to clearly articulate the purpose and expectations of the team’s work. Be sure to communicate to each member the reasons their participation is vital. Emphasize that this is not just an obligatory meeting during which team members “go through the motions” and check off the requisite tasks. Instead, everyone should understand the important role their participation plays toward achieving each meeting’s outcome.

Consider the following:

- **Common goal**
 - What changes are you asking team members to work toward?
 - What outcomes are you hoping to achieve together?
- **Need for openness**
 - How will you encourage and support team members to share their own experiences and expertise?
 - How will you encourage and support team members to be welcoming and accepting of others’ experiences and expertise, especially when different from their own?
- **Time commitment**
 - How often will the team meet and for how long?
 - Are you asking team members for a short-term commitment as your district or school determines and prioritizes actionable root causes, or are you asking them for a longer-term commitment that requires them to participate in developing and implementing an action plan?
- **Preparation expectation**
 - How will you support team members’ preparation (e.g., asking them to review information from the resource list prior to the first meeting about the process or about the success gap(s) you will be discussing)?



Roles and Responsibilities

The equity team composition is critical to the process of identifying the root cause(s) of success gaps. Having varied perspectives provides the best chance to identify the policies, procedures, and practices that may limit opportunities for some groups of children and students. Some schools or districts form a new cross-departmental team or repurpose an existing team with the specific mission of improving equitable opportunities.

When selecting team members, it is important to consider a cross-representation of stakeholders. These stakeholders include educators, support personnel, and people who have experience working with the group(s) of children you identified in the success gap statement. Representation should also include youth, families, and community partners knowledgeable about the group of children on whom the success gap work will focus. Including those with “lived experience” helps ensure all perspectives are represented, considered, and valued.

Individuals that should be invited to participate include



a designated **representative of the district or school**, often a curriculum director or school principal, who can influence change in policy and procedures, contributes to understanding of the education curriculum, and has knowledge of district or school resources;



families representing the group of children experiencing the success gap and who will participate as full and equal members of the team;



general education and special education professionals (both certified and classified staff) who work with a range of student groups, including those identified as part of the success gap (e.g., if the gap is between English learners and students who are not English learners, ensure that professionals working with both groups are represented), and who serve as an expert in universal instruction as well as multi-tiered intervention;



students of an age and maturity level, with an interest in and willingness to participate, who can be included in meetings as appropriate;



educational professionals with experience collecting, analyzing, and explaining district and school data (e.g., school psychologist, school counselor); and



community partners from other child- and family-serving organizations, particularly those who can speak from lived experience to the issue relevant to the group of children identified in the success gap.

Leaders can use the form provided in [appendix B](#) (Equity Team Member Representatives) as they are assembling their equity team. Keep in mind that it is likely that you will need to add additional voices throughout the process as you learn more about what is causing—and what is required to resolve—your success gap(s).



[Appendix C](#) provides a sample email/letter for inviting equity team members. A customizable version of this email/letter is available at https://www.ideadata.org/toolkits/files/sample-letter-for-inviting-equity-team-members_final.docx.

Effective Group Processes

How do we schedule and plan for team meetings?

Group process refers to how a team works together to accomplish its outcomes. Typically, leaders spend a great deal of time and energy setting and striving to reach goals, often with little attention to the process the team will follow together to accomplish its goals. To facilitate a productive meeting and encourage thoughtful discussion, the facilitator you select can establish a schedule and plan for team meetings and a structure that facilitates engagement as discussed below.

The *Success Gaps Toolkit* is flexible so that your equity team can work through the process in the way that fits your district's or school's unique needs and resources. To set up team meetings, you will need to consider

- frequency of meetings;
- length of time the team can meet;
- how much time team members can devote to the work outside of meetings; and
- how you will keep team members engaged over time and/or rotate team membership.

These factors will determine how quickly your team can move through the success gaps process. Remember that your goal is to produce sustainable change, not complete the process within a specific time frame. You may need time to develop buy-in from colleagues and determine how to best weave your equity improvement efforts with existing plans and initiatives in which your district or school is engaged.

As you and your team think about how to structure your team's work through the process, you'll want to think about the amount of time your team will be able to devote to the work and on what schedule. In the table below, you will find several examples of ways teams with different blocks of available time might structure their success gaps work. Keep in mind that what is most important is that your team work through the success gaps process, one step at a time. Your team can tackle one task in a meeting or several tasks, depending on the amount of time your team can devote to the process.



Task	If your team has:		
	1-hour blocks	2-hour blocks	Half-day blocks
Identify success gap: group of children affected, outcome area, supporting data	School/district leadership, equity lead, facilitator, and data lead start discussion of documented success gap.		
Form or modify a team	School/district leadership, equity lead, facilitator, and data lead invite potential team members.		
Prepare and share data, and create success gap statement	<ul style="list-style-type: none"> One meeting to introduce purpose, share initial data, and develop additional data questions. Team members commit to bringing back data to share with the team. One meeting where team members bring back data they have collected and share their insights. One meeting where the team builds consensus to confirm/refine the group of children experiencing the success gap and outcome area based on the team’s examination of the data and then writes the problem statement. 	<ul style="list-style-type: none"> One shorter meeting to introduce purpose, share initial data, and develop additional data questions. Team members commit to bringing back data to share with the team. One meeting where (1) team members bring back data they have collected and share their insights, (2) the team builds consensus to confirm/refine the student group and outcome based on the team’s examination of the data, and (3) the team writes the problem statement. 	<p>One meeting, structured over 3 hours:</p> <ul style="list-style-type: none"> During the first hour, introduce purpose, share initial data, and develop additional questions. Break for an hour for team members to collect data to share with the team. Spend remaining 2 hours sharing data collected to answer data questions, building consensus to confirm/refine the student group and outcome based on the team’s examination of the data, and writing the problem statement.



Task	If your team has:		
	1-hour blocks	2-hour blocks	Half-day blocks
Use team, data, and rubric to find root causes	<ul style="list-style-type: none"> Multiple meetings to discuss one or two rubric indicators at each meeting (after team members have completed the rubric indicator individually). One meeting to revisit any rubric indicators based on identification of additional data. One meeting to use rubric results and school/district data to determine contributing factors and root causes. 	<ul style="list-style-type: none"> Multiple meetings to discuss several rubric indicators at each meeting (after team members have completed the rubric indicator individually), and to revisit any rubric indicators based on identification of additional data. One meeting to use rubric data to determine contributing factors and root causes and begin priority setting. Team members develop ideas for goals and action items before next meeting. 	<ul style="list-style-type: none"> Two meetings to document evidence and discuss rubric indicators (after team members have completed the rubric indicator individually). Identify any rubric indicators that require additional information and discussion. One meeting to revisit any rubric indicators identified to review additional evidence from team members, use rubric data to determine contributing factors and root causes, and set priorities.
Develop action plan	<ul style="list-style-type: none"> One meeting for priority setting and goal development. Two meetings to develop action items, timelines, and evaluation data. 	<ul style="list-style-type: none"> One meeting to develop proposed goals, action items, timelines, and evaluation data. 	<ul style="list-style-type: none"> One meeting to develop goals and action items, timelines, and evaluation data.
Implement plan and monitor progress	<ul style="list-style-type: none"> Continue regular meetings to track achievement of action items and adjust plan implementation. Plan for annual updates to the rubric ratings to assist in evaluating your progress and adjusting your plan. 		

Once you decide the time frame for your meetings, consider ways you might structure the team's work. Below are some examples.

Before the meeting

- Ensure team members are not clustered in one area (e.g., family members, district personnel), and create a balanced seating arrangement (e.g., use round tables).
- For in-person meetings, provide name tags or name tents so that participants can address each other during the meeting.
- Prepare participant and facilitation agendas, which will help manage time and expectations of the meeting.

Beginning of the meeting

- Create group awareness of how each individual will contribute, beginning the meeting with introductions that include a description of each person's role.
- Provide a clear understanding of what you expect of participants to support the shared mission and goals.
- Post a visual agenda and provide a copy for every member, noting the allotted time for each of the meeting's various components.
- Be sure to begin and end the meeting on time.
- Assign organizational meeting roles during the meeting to guide the group processes, maintain momentum, and promote the best use of time.
 - Support efforts for all participants, regardless of their role, to work together to ensure the meeting proceeds smoothly.
 - Confirm the five key organizational meeting roles for the equity team: (a) the equity lead, (b) the meeting facilitator, (c) the data lead, (d) the notetaker, and (e) the timekeeper. These roles are further explained below.

During the meeting

- Provide various ways for participants to voice their thoughts during the meeting, such as the following:
 - Discuss first with a partner or small group.
 - Add their thoughts anonymously to an online group document.
- Monitor meeting productivity.
 - Consider calling for a break if team members appear to be growing frustrated or tired.
 - Ask the team to consider scheduling another meeting to continue the discussion if the team is not making progress or the meeting is running long.
- Plan appropriately for virtual meetings.
 - Consider and plan for how the virtual format could affect the flow and length of the meeting.

- Consider the technology that will allow stakeholders to participate and share in an equitable way. Examples include
 - arranging multiple methods for team members to interact and contribute their ideas, such as shared editable documents, digital whiteboards, breakout rooms, etc.; and
 - utilizing the relevant functions in the meeting platform (e.g., polls, chat rooms).
- Consider the resources list in the *Success Gaps Toolkit* for additional information about planning effective virtual team meetings.

After the meeting

- Design a way for participants to provide feedback about the meeting (e.g., use +Plus/Δ Delta activity, use poll questions).
- Follow up on participant feedback by providing a summary of the feedback (e.g., via email, at the beginning of the next meeting).
- Consider ways to incorporate team member suggestions into future meetings.

What are the key roles and responsibilities of team members during meetings that will help the team be successful?

Each equity team member plays a critical role as participant. Participants are the key stakeholders, with a vested interest in ensuring equitable opportunities for all children, and whom the district or school invites to participate. Participants work together to ensure the meeting is productive and the team achieves the desired outcome.

Their responsibilities include

- adhering to the agreed-upon terms of reference and norms of behavior;
- participating in discussions and decisionmaking; and
- resolving problems using a solutions-oriented focus.

In addition to participants, there are five key organizational meeting roles for the success gap team: (a) the equity lead, (b) the meeting facilitator, (c) the data lead, (d) the notetaker, and (e) the timekeeper. Participants hold these roles at meetings to help guide the group processes, maintain momentum, and promote the best use of time. These key roles are described below.

Equity Lead

The equity lead is responsible for shepherding the work of the team to review and understand the data related to the success gap, determining the actionable root causes, and spearheading improvement efforts. Typically, the lead develops the initial description of the success gap, determines the data to use as the starting point, identifies participants and key responsibilities, arranges meeting dates and locations, and prepares and distributes the agenda before the meeting.

It is generally helpful to identify an instructional leader who is well-liked by the school or district community and has both influence and authority for decisionmaking, such as a curriculum director, assistant

superintendent, or building principal. The equity lead may act as the facilitator or may choose to identify another individual as the facilitator so the lead can attend the meeting as a participant. After meetings, the equity lead provides stakeholders with a summary that includes next steps.

Meeting Facilitator

The meeting facilitator helps plan the equity team meeting and guides participants during the meeting. Before each meeting, the facilitator works with the equity lead to identify objectives and the agenda for the group. During the meeting, the facilitator leads the team in identifying group norms, keeps the meeting focused on the agreed-upon objectives, creates a safe space for discussing sensitive topics, and ensures that all voices are heard and valued. After the meeting, the facilitator works with the equity lead to reflect on whether the meeting objectives were accomplished and what support the team will need to accomplish any next steps. The facilitator can be internal staff or outside support, such as an IDC technical assistance (TA) provider.

Data Lead

The data lead provides access to and presents the data needed to inform the discussions in an accessible and easily understood way. The data lead works with the equity lead and meeting facilitator to prepare data for each meeting and is available during and between meetings to provide data to all team members.

Notetaker

The notetaker is responsible for capturing the group memory of the equity team meeting. The meeting notes should capture important points and decisions, without becoming a verbatim transcript of the meeting.

Timekeeper

The timekeeper is responsible for assisting the facilitator with keeping the meeting on schedule. Using the time frames on the agenda, the timekeeper alerts the group when the time allocated for a particular part of the meeting will soon elapse. The notetaker will often also act as the timekeeper.

See [appendix D](#) for additional information on these roles and responsibilities.



Ground Rules

Planning for your first team meeting

Careful planning will help your meeting run smoothly. By ensuring a cross-representation of stakeholders in the process, the equity team increases its ability to look more deeply at areas of potential success gaps. However, because the topics participants raise in equity conversations can be sensitive, it is important to acknowledge that team member(s) representing certain groups may have more or less agency and power in society and schools. This imbalance of agency and power can affect how team members interact with one another. Therefore, it is crucial *before, during, and after* each meeting to ensure all voices are heard and valued, especially those representing the group(s) of children and youth being discussed.

Plan carefully to ensure equity of voice to make it easier for everyone to participate and to set the tone for a productive meeting. Simple steps, like arranging seating in a circle, and providing multiple ways for participants to voice their thoughts beyond speaking up in the meeting (e.g., providing options for discussing

first with a partner or small group, or adding their thoughts anonymously to an online group document) can make it easier for everyone to participate. As this is a team that will meet repeatedly, it may be valuable to spend time developing terms of reference, which also includes establishing norms of behavior (i.e., group norms, ground rules).

- Terms of reference refers to decisions regarding how a group of people agree to work together (e.g., interact, communicate) to accomplish common goals.
- Norms of behavior are guidelines that describe specific actions and behaviors that team members should take to promote collaboration.

At a minimum, setting [group norms](#) together can help set the tone for a productive meeting. Teams do not need a lot of established norms to work well together, but having agreed-upon expectations that the team applies consistently can significantly improve how your team solves problems and makes decisions. While the equity lead and meeting facilitator may sketch out initial plans for the work, the team may choose to develop these agreed-upon norms together. By creating expectations together, you will help the team promote a shared responsibility for ensuring team members adhere to the agreed-upon norms during each meeting.

POSSIBLE AREAS TO CONSIDER WHEN CREATING NORMS OF BEHAVIOR



- What constitutes respectful behavior toward other team members?
 - What are the expectations regarding attendance, agenda, and boundaries of time?
 - Do all team members use the same words to mean the same thing?
- How does a team member engage fully in the meeting?
 - What discussion style (e.g., structured vs. unstructured, case study) is appropriate for this meeting?
 - Should the facilitator call on a person before he or she speaks?
- How do team members communicate BEFORE, DURING, and BETWEEN team meetings?
 - What information should members receive before a meeting?
 - Are interruptions OK? What about side conversations?
 - How does the equity lead keep everyone on the team informed of progress toward next steps?

See [appendix E](#) for an example of group norms.



Decisionmaking

It is crucial that each team member actively engages in the decisionmaking process. To do so, make sure the facilitator ensures that team members understand the distinction between dialogue and discussion and that both are a part of the decisionmaking process.

- Dialogue is an initial conversation that takes place between team members during the meeting. In a dialogue, there is a free flow of communication as people exchange their ideas and respond to others' thoughts. During a dialogue, there is no advocacy for one idea or theory over another between team members. During this part of the process, team members should be open to the ideas of others.
- Discussion is quite different from a dialogue. Discussions are decision-based. Unlike participants in dialogue, people in discussion want the group to accept their views. During this part of the decisionmaking process, the flow of ideas is often disrupted as people attempt to present and advocate for their opinion or recommendation.

Knowing where the group is in the decisionmaking process (i.e., whether in dialogue or discussion) is an essential distinction regarding their level of advocacy. It is the difference between seeking to understand and seeking to be understood.

On those occasions when team members do not agree, the facilitator is responsible for making certain that all ideas, opinions, and concerns are considered during the discussion period of the decisionmaking process. Although not all team members will get what they want, the team can move forward when each member agrees that he or she can live with the final decision. **Even though consensus may not always be reached, it can be achieved more reliably by**

- seeking input from all team members;
- listening to others;
- identifying area(s) in which compromise is needed;
- asking questions to achieve clarity and promote understanding of perspectives;
- brainstorming possible solutions;
- listing the most viable solution(s) and discussing the pros and cons of each; and
- selecting one or more solutions that the entire team can support.

[Appendix F](#) contains a template for recording equity team meeting notes. A customizable version of this template is available at <https://ideadata.org/toolkits/files/template-for-recording-equity-team-meeting-notes-final.docx>.



Prepare and Share Data About the Success Gaps



Collecting and evaluating data is extremely important in the process of discovering the root causes of success gaps in order to identify appropriate solutions. Unfortunately, it may be challenging to understand and interpret the data collected.

DATA EXAMPLE

Middle School A has identified a success gap for Hispanic children in mathematics. The school initially identified the gap by looking at math end-of-year assessment data. In grades 6-8, Hispanic/Latinx children scored, on average, 15 scale score points lower than other groups of children.

To learn more about this gap, Middle School A examined the following data:

- math end-of-year assessment data by race/ethnicity, grade level, teacher, gender, and other child characteristics, such as English learners, children with disabilities, and economically disadvantaged children;
- quarterly math benchmark assessment data, aggregated and disaggregated in the same groups;
- comparison data from the previous 5 years;
- attendance and discipline data disaggregated by race/ethnicity; and
- inventory of learning strategies employed by each grade level and teacher.

What Data Should Leaders Prepare to Share?

In building understanding, leaders (e.g., equity lead, data lead) must prepare multiple sources of data in advance to support their team. They will need to consider carefully the types of data available and how they may need the data broken down to review all of their relevant elements. Having the data in advance will ensure every team member has time to review and interpret the meaning for him or herself. Then, as the members come together as a team, the diverse perspectives will allow the group to make nuanced meaning of the data and develop a detailed understanding of the situation the data represent.

As you decide what data to share and how to present the information, consider the following:

What are your success gaps?

- What data clearly show the gaps, thereby establishing the rationale for selecting a particular group of children and a specific outcome?

What do the data suggest when you aggregate them at the district or school level?

- How do district data compare to state data?

- How do school data compare to district data?

What are the gaps when you disaggregate the data?

- What nuances or differences do you see by grade, gender, race/ethnicity, or other demographics?
- What are the differences by other student subgroups such as students with and without disabilities, specific disability categories, English learner/non-English learner, migrant/nonmigrant, economically disadvantaged/noneconomically disadvantaged?

What different ways can you group the data?

- Are you considering the full array of demographic data such as race/ethnicity, disability/no disability, gender, grade or school level (high school, middle school, elementary), economically disadvantaged/not disadvantaged, English learner/non-English learner, migrant/nonmigrant, and any other grouping?

What are other data related to the data about the success gaps?

- For example, if your success gap is about achievement results, can you break each proficiency level down by demographic data? Can you equate proficiency levels with attendance data?
- If your gap is about dropout rates, can you look at attendance and class passing rates for each group of students and make some comparisons?

Be prepared for the team's conversation to lead in directions you might not have predicted. Make sure the equity lead and/or data lead has related data on hand that can be easily manipulated (e.g., via a spreadsheet), as needed, so that the team can look at the data in multiple ways. Ensure there is a time during your team meeting for further dialogue about what the data cannot tell you, such as about the lived experience of the students or the influence that other systemic inequities may have on the data.

Several IDC tools can help you prepare your data for sharing:

- *Part B Indicator Data Display Wizard* (<https://www.ideadata.org/sites/default/files/media/documents/2020-02/IDEA%20Part%20B%20Indicator%20Data%20Display%20Wizard%202-6-2020.xlsx>)
- IDEA Data Quality: Outlier Analyses Tools (<https://ideadata.org/resources/resource/1508/idea-data-quality-outlier-analyses-tools>)
- *Interactive Public Reporting Engine* (<https://ideadata.org/interactive-public-reporting-engine-v2>)
- *Data Meeting Toolkit* (<https://www.ideadata.org/data-meeting-toolkit>)



Refining the Initial Success Gap Statement

Once you and your team have thoroughly examined your data from many different angles, you can use the information you have collected to refine your success gap statement further into a more specific and descriptive statement.

The final success gap statement your team creates should describe the gap between the current condition and the desired condition. Having a precise and descriptive success gap statement that includes more detail than your initial statement will help your team think specifically about the barriers and challenges the group(s) of children face. This analysis is critical as you begin to explore the root causes in your district's or school's systems and structures.

Be mindful not to include causes or possible solutions in your final statement. Causes and solutions will come *after* your team has had a chance to examine your district's or school's current practices, procedures, and policies to identify potential barriers to equitable opportunities for all children.

The refined success gap statement should include information that describes each of these elements:

- What is happening?
- Whom does the problem affect?
- Where is the problem occurring?
- When is the problem occurring?
- How often is the problem occurring?
- To what extent?
 - What is the current level compared to the desired level?
- How do you know?
 - What evidence supports your statement?



Following are two examples of success gap statements that incorporate these critical elements.



Example 1:	
Initial success gap statement: In Smithfield district, children with disabilities in elementary school are scoring at 60 percent or less proficiency in reading.	
What is happening?	We are not serving our children with disabilities in a way that allows them to meet mid-year oral reading fluency targets.
Whom does the problem affect?	The problem affects children in all disability categories, especially children with specific learning disabilities who are also English learners.
Where is the problem occurring?	The problem is first evident in third grade; however, 34 out of 47 of the same children also did not meet beginning-of-year targets, suggesting that the problem begins earlier than third grade.
When is the problem occurring? How often?	The problem has persisted in mid-year screenings since 2012.
To what extent is the problem occurring? What is the current level compared to the desired level?	Our district’s goal is to ensure that at least 80 percent of students reach the mid-year targets; currently, we are only helping 30 percent to meet this goal.
How do you know? What evidence supports your statement?	Oral reading fluency screening data show this gap, but we also can see it when looking at state assessment data, and the gap persists into the later grades.
Refined success gap statement: We are only supporting 30 percent of our third-grade children with disabilities to meet mid-year oral reading fluency targets; 34 out of 47 of the same group of children did not meet the beginning-of-year targets, suggesting earlier system failures.	

Example 2:	
Initial success gap statement: Black or African American students are receiving office referrals for behavior at 4 times the rate of students of other races and ethnicities.	
What is happening?	Office referrals due to disciplinary infractions have increased dramatically this year. Office referrals equal 0.82 referrals per day per month per 100 children, exceeding the target of 0.5 referrals per day per month per 100 children.
Whom does the problem affect?	Ninth- and tenth-grade Black or African American students referred for disrespect or disruption.
Where is the problem occurring?	Most referrals are coming from classrooms.
When is the problem occurring? How often?	Over the last 3 months.
To what extent is the problem occurring? What is the current level compared to the desired level?	Over the last 3 months, twice as many Black or African American ninth- and tenth-graders, compared to other student groups, have had office referrals.
How do you know? What evidence supports your statement?	Of the ninth- and tenth-graders referred in the last 3 months, three-quarters of the referrals are for Black or African American children referred from their classrooms for either disrespect or disruption.
Refined success gap statement: When we review office referral data disaggregated by racial/ethnic group, grade level, and location for the last 6 months, the data indicate that twice as many ninth- and tenth-graders have been referred to the office in the last 3 months. Of these students, three-quarters are Black or African American students referred from their classrooms for either disrespect or disruption.	

[Appendix G](#) contains a template for your team to use as they work to refine the success gap statement. A customizable version of this template is available at https://ideadata.org/toolkits/files/template-for-refining-the-initial-success-gap-statement_final.docx.



Determine Actionable Root Cause(s)

After exploring the data and developing a detailed success gap statement, the team is ready to begin identifying *actionable* root causes. Digging deeply enough to find the root causes is important to be confident that the action your team will eventually select to address the success gap(s) will result in improved outcomes. It is critical to continue your analysis until you reach “the deepest underlying cause or causes of symptoms within a process that, if dissolved, would result in elimination, or substantial reduction, of the symptom” (Preuss 2003).



KEY TERMS

- The **root cause** is the fundamental reason that the success gap is occurring.
- An **actionable root cause** is one that the district or school can act on and change the results.



Why Is Identifying the Actionable Root Cause(s) Important?

Keep in mind that some root causes are actionable, and others are not. For example, your team may find that poverty as well as culturally inappropriate behavioral interventions have both contributed to your success gap. While a district or school team cannot directly intervene on a child’s economic status, it can identify and implement more appropriate behavioral interventions to support students. Thus, one root cause is actionable, and one is present and overlying but not actionable by the district or school. Still, a district or school team may decide to act on a symptom of poverty, such as providing nutritious food to eat in school or providing internet access in a community, even though the root of the problem is out of reach.

Some interventions are more easily identified and implemented and may appear to address the problem because they address the problem’s symptoms. Unfortunately, these interventions don’t resolve underlying issues.

AN EXAMPLE

If a school has a large number of children who are not meeting proficiency targets in mathematics, school staff could choose to provide additional minutes of mathematics instruction to those children. While this approach may improve outcomes in the short term, each year, the school may find it has to continue providing this additional instruction for a large group of its children. This issue may persist because the school has treated a symptom of the problem rather than the root cause. A closer inspection of the school’s data over time could reveal that the core instructional approach is not a good fit for the children who are English learners.

When the school intervenes by implementing instructional methods that meet the needs of this group of children, as well as other children, it will find that far fewer children need supplemental support going forward.



How Can You Identify Actionable Root Cause(s)?

The *Success Gaps Rubric*, an essential component of the *Success Gaps Toolkit*, is designed as one data source to guide your team in identifying the root causes of the success gap. The rubric is based on reviewed research that identifies seven essential elements of successful instruction for all children. These seven elements, which are further described in the Introduction, are

1. Data-Based Decisionmaking;
2. Cultural Responsiveness;
3. Core Instructional Program;
4. Ongoing Assessment—Universal Screening and Progress Monitoring;
5. Evidence-Based Instructional and Behavioral Interventions and Supports;
6. District/School Leadership That Facilitates Improvement; and
7. Parent/Family Engagement Throughout the Education Process and System.

Completing the steps outlined in the rubric will explicitly help your team to consider all seven elements in your analysis by reflecting on how current systems and practices in your district or school affect educational opportunities for the group of children you are discussing.

Using the rubric, you will consider five elements:

- Data-Based Decisionmaking;
- Cultural Responsiveness;
- Core Instructional Program;
- Assessment—Universal Screening and Progress Monitoring; and
- Interventions and Supports.

Note that the elements of leadership and family engagement are not individual components of the rubric but are interwoven throughout the success gaps process, as they are integral to student achievement. Because leadership directly affects the district's and school's culture and climate, leadership is promoted in the process by encouraging leaders to be role models in the process and forerunners of equitable practices. Additionally, family engagement is incorporated into the process through team membership and embedded in each rubric section. Engaging families and the community in all school activities and decisions, as well as their child's education, creates a welcoming and equitable educational environment.

What Are the Steps to Complete the *Success Gaps Rubric*?

The goal of completing the rubric is to collect information about your district's or school's current status from many perspectives. The process is iterative and takes time. Most teams will need multiple team meetings to complete their evidence collection and consensus-building.

You will use each member's feedback, data they provide, and other available data to create a collection of evidence about each element in the rubric. You will use this data-based evidence to guide your discussion,

build consensus, and produce a rating for each indicator in the rubric. A description of the steps for completing the rubric follows.

1. Complete the rubric individually

To make the most of your team's time together, team members first should review and complete the rubric individually. Individual reflection will allow each team member to consider each indicator's status and any evidence (including data) he or she can contribute to support the team's conversation about the indicator's rating.

Encourage each team member to respond honestly based on what he or she knows about the experience of the group of children or students who are experiencing success gaps in your district or school. Keep in mind that evidence of relevant strengths is welcome—if your district or school is doing an excellent job in some dimensions, say it! Your team will build on these strengths later as they identify and explore ways to address factors contributing to success gaps. If individual team members have questions about the system's current status, they should note their questions and raise them during the team discussion.

2. Collect evidence

Consider the method by which you have the team process this information. If you have a large group, think about having members first discuss their ratings and thoughts in a smaller group (e.g., pairs, triads) before discussing as a larger group.

You also might ask the small group to add its thoughts to a shared document or chart that a nominated team member can present to the larger group. This processing method will promote greater cohesiveness and increase participation from group members who are more hesitant to share their thoughts and opinions in front of the whole group.

3. Build consensus

Once all team members have collected and discussed all the data, you can poll the team to see how most team members rate the district or school on the indicator. Ask team members to indicate which rating they believe best represents the district's or school's current state with a show of hands (or chat box comment). If the team agrees on the rating, and you have collected the evidence the team members brought with them, you are ready to move to the next indicator.

If the team's ratings differ, invite team members to share their rationale for a particular rating. A common mistake is to overvalue the voices of authority and academic expertise and undervalue the voices of lived experience that the community members representing those who are experiencing success gaps provide. No one understands the educational experiences that are causing the success gap better than the children experiencing them and their families. Remember, too, that data can appear objective but are inevitably interpreted through the lenses and implicit or explicit thinking of the people analyzing those data. Consider making those ideas explicit to advance your conversations.

After hearing from different team members' perspectives, ask team members to share again their thoughts about how to rate the district's or school's current status. Would their initial rating change after hearing other perspectives? Again, the facilitator will need to ensure that the team considers all

perspectives to develop the best information about the current experiences of the group of children facing success gaps in your district or school. Continue this process until all voices are heard.

If the team cannot reach a consensus because members need additional information or data are unavailable immediately, note the additional information the team requires and determine which team member is responsible for bringing the data back to the team. When the team reconvenes, come back to any outstanding items, review the additional data, and use that information to reach a consensus on any outstanding indicators.

Keep in mind, if disagreements persist, acknowledge and appreciate the varied perspectives and decide how to move forward. Of utmost importance during these discussions is to ensure that all voices are heard and individual views are respected. To understand the systemic barriers the student group faces, team members must remember that others' experiences are different, valid, and important.

4. Use the rubric results to determine actionable root causes

Once the team has thoroughly discussed and, if possible, reached a consensus on each indicator, your team can use the rubric results alongside the success gap statement and data to explore root causes. The facilitator can begin the discussion by asking team members what patterns they notice in the rubric ratings and what data support those patterns.

- Which rubric indicators show the greatest need for improvement?
- Are there items of evidence that are common across multiple indicators?
- What do these patterns or trends suggest may be the barriers to all children or youth experiencing success?

Next, the team should consider how the patterns or potential barriers they have identified contribute to the success gap statement. Make a list of possible root causes. Compare the team's thoughts about root causes to the data that you analyzed before the team completed the rubric.

- Do the data support (or at least not contradict) the root causes the team has identified?
- How does the list of root causes align with the experiences of team members?
- Are there any other data or evidence that the team needs to research before making a final decision about root causes?

Once the team feels confident that the elements they have identified are a good fit for the rubric results and the success gap statement, the team will need to determine which of the identified root causes are actionable. While it is important to acknowledge root causes outside your district's or school's control, encourage your team to focus their primary efforts on areas where the team can initiate change and improvement.

5. Prioritize actionable root causes

After determining which of the identified root causes are actionable, your team will prioritize the root cause(s). Identifying priorities is crucial because it is unlikely that your district or school will have the resources (time, personnel, and materials) to work toward eliminating all the identified root causes at once. Priority setting is about balancing factors such as urgency, availability of resources, and level of

effort to identify where your district or school can exert its efforts best. This toolkit includes the *Priority Setting Tool*, which can help your team weigh considerations to determine priority areas. For each indicator, your team will document the identified actionable root causes and potential foci of your improvement work. The *Priority Setting Tool* helps the user rate each indicator from the rubric based on the urgency of the issue, the availability of resources to intervene, and the level of effort required to create change. The tool then helps the user calculate a priority recommendation based on these ratings. Any item with an urgency rated as critical will automatically appear as a high priority recommendation. In addition, items will appear as a higher priority if the team rated them as requiring a low level of effort—enabling your team to accomplish some quick wins. To access the *Priority Setting Tool*, go to <https://ideadata.org/toolkits/files/successgapsprioritysettingtool.xlsx>.

[Appendix H](#) contains a one-page handout of these steps that equity leaders can provide to team members as they complete the rubric.



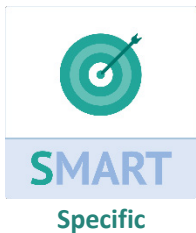
Create an Action Plan

The next step after identifying and prioritizing actionable root causes is to develop an action plan that describes goals, tasks, and timelines for addressing the root causes. A well-thought-out action plan will help your team stay on track amidst competing priorities, predict and neutralize potential barriers, and measure progress toward goals.



Develop Well-Written, Measurable Goals

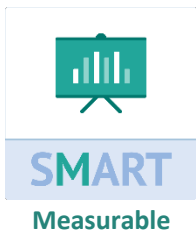
The first step in creating this action plan is to develop a well-written, measurable goal. To accomplish this, your team may consider using the acronym SMART in the goal-development process or whichever goals your district or school uses for improvement planning. SMART stands for specific, measurable, actionable, reasonable, and time-bound. Each element of the SMART framework works together to create a thoughtful, concise, and trackable goal.



Clearly and specifically state a description of each goal. Be as concise as possible in stating what you want to achieve.

- Who is involved?
- What will you do?
- Where or with what group?

The more narrow your goal, the more your team will be able to identify the action steps necessary to accomplish it.



Identify what quantifiable evidence will illustrate that the team is making progress toward the goal. By defining an observable, measurable standard, the team can set milestones along the way that provide the opportunity to reevaluate and course-correct as needed.



Involve actions that are attainable and aligned with your goal, are observable, and that you can accomplish within an identified time frame. Carefully consider what you can accomplish. Decide whether you can achieve the action now or if you should take additional preliminary steps—it is better to start small and grow your plan over time.



SMART

Reasonable/Realistic

Consider practicality while striving to set ambitious and challenging goals. Your identified goal should align with your organizational values and long-term objectives. If a goal does not contribute toward your organization's broader objectives, you may need to rethink it.



SMART

Time-Bound

Identify a specified time frame for when you will accomplish the goal and subsequent actions. Setting a realistic end date supports prioritization and motivation to achieve the goal.

However, be conservative in your projections. Recognize that it may take several years to have an impact on your success gap because some systemic inequities are deep-rooted. In such cases, think carefully about and record what results you can expect to see during each step in the process.

Note: There are a number of variations for how SMART is defined (e.g., the letter A may stand for actionable or aligned).

The *Success Gaps Toolkit* includes several action planning templates that you can use to facilitate your team's action plan documentation process. If your district or school has a standard format for action planning, use that template to promote consistency and linkages with existing processes.



Outline Action Steps

After your team has identified and written the goal statement, you will determine the specific steps or tasks needed to accomplish the goal. This process may require you to divide your main goal into small goals or objectives. Doing so can help the team focus its work into an organized step-by-step action plan.

Consider the following questions:

- What is needed to create improvement (actions, resources, policies, procedures, etc.)?
- How can you break the desired improvement down into manageable steps?
- Who is responsible for implementing each action?
- How can you plan for continuity if there are personnel changes?

Consider connections to other work:

Your team also may want to think through ways to align and braid your team's equity work with other action plans at the district or school level. Merging all of your action steps into one action plan may make implementing and tracking more manageable for busy district and school leaders. For example, suppose significant disproportionality is an area of identified need in your district. In that case, the action steps you craft to address this success gap may supplement or serve as an overall district equity plan. That district equity plan may include actions to support comprehensive support and improvement (CSI) schools identified under the *Elementary and Secondary Education Act* (ESEA).



Determine Your Timeline

Besides setting a time frame for accomplishing the long-term goal, your team should also include a timeline for monitoring the progress of each action step of the plan. By creating a well-thought-out timeline, the team can establish milestones and maintain consistent progress toward the goal.

The team should also include in the timeline a process for reporting progress. Because the communication feedback loop is critical to maintaining stakeholder engagement, the equity lead needs to consider *when* and *how* the equity team, district leadership, or other stakeholders will receive updates regarding progress and accomplishments.

For each action step, consider the following:

- What is the needed time frame for implementing the planned action?
- Does this action warrant additional discussion and check-ins? If yes, how often?
- If decisionmakers outside the group must approve proposed actions, when and how will you update team members (e.g., at the next meeting, via email)?
- How will those implementing the actions communicate their progress and challenges, and to whom?

[Appendix I](#) contains a template for your team to use as they work to develop an action plan that describes goals, tasks, and timelines for addressing the root cause. A customizable version of this template is available at

https://ideadata.org/toolkits/files/template%20for%20success%20gap%20action%20plan_final.docx.



Plan for Evaluation

Your team has invested a lot of time developing an action plan, and it is equally important to track the plan's implementation. An evaluation plan can help you draw conclusions about your improvement work. Your team can monitor and evaluate implementation of the action plan by collecting both process (implementation) and outcome data (data about how students are doing). First, identify what data you need to collect throughout the implementation process as evidence that the plan was carried out as you intended (with fidelity). Analyzing implementation data will help you determine whether the supports you put in place are sufficient and, if not, whether you need to provide additional opportunities for technical assistance or coaching to improve implementation.

DID YOU KNOW?

Evaluation should be planned as you are developing your action plan. Waiting until after you have implemented your initial action steps to think about and plan for progress monitoring and evaluation can result in your team not having the information needed in a timely manner.



Additionally, consider what data you will collect to help you determine what changes you can measure before, during, and after implementation. Collecting both intermediate output and short-term outcome data allows you to track intermediate changes and improvements along the way to longer-term outcomes.

Consider the following questions:

- How will you know implementers carried out the intended action as you planned?
- What data will help you determine if the systems supporting implementation are sufficient?
- What data points will serve as key markers throughout the improvement cycle?
- What intermediate outputs and short-term outcomes will you look at to help you know you are on the right track?
- What data may let you know that there are adjustments you need to make?
- How will you know whether the actions worked? What data will show improvement has occurred?

Implement Plan and Monitor Progress

Once the team has a plan of action to address the success gap(s), the most important part of the work begins: implementing the action plan and monitoring progress. Monitoring plan implementation and progress on actions will help keep your team informed and accountable. As you consider modifying your action plan, you will want to avail yourself of the wealth of perspectives available to you. Thus, as the equity lead, you will want to bring your complete equity team together periodically (e.g., a few times a year, at minimum) to discuss progress.



These ongoing check-ins provide an opportunity to

- monitor and report progress on specific action steps;
- review the implementation and outcome data collected during the implementation;
- consider new data received or collected or challenges that have arisen;
- evaluate how the work is going; and
- determine when incremental changes or course corrections are needed.



Implementing

As equity team members take on active implementation roles, it may be necessary to have a smaller group of implementers commit to meeting more frequently. This smaller group should meet monthly (at least in the beginning) to share updates on the work outlined in the action plan timeline, review collected data, and problem-solve implementation challenges.

The action plan can serve as a guide for building agendas for these meetings. The facilitator or equity lead should track upcoming due dates on the action plan and identify which team members will need time on the agenda to provide updates to the group. These updates should include progress on the steps of the action items and implementation or outcome data the team collected. Analyzing the data the team collects throughout the process will help your team evaluate when progress is sufficient. Also, it will help your team evaluate when you may need to revise your action steps to strengthen support for implementation or update your implementation strategies.

Following are steps to consider when preparing for monthly meetings:



Set Up regular monthly meetings for the equity team to monitor implementation of the plan and progress toward intended results.



Review the action plan timeline and add the additional staff who may provide specific feedback or update the equity team on relevant items.



Identify needed data and updates from team members on the action plan.



Create the meeting agendas at least a week prior to the meetings and provide them to those scheduled to attend.



Update action plans at the monthly meetings.

- Indicate completed items.
- Use the collected data to evaluate the action plan's effectiveness or needed adjustments.

Continuing the Cycle to Address Success Gaps

Equity, inclusion, and opportunity for all children is important but not easily achieved. The systemic factors contributing to success gaps for particular groups of children are often challenging to identify and address. The process outlined in the *Success Gaps Toolkit* provides a framework for discovering more information about the systems and structures in your district or school that may be contributing to discrepancies in child access, opportunities, and outcomes.

It is not enough to create an equity team that will use the *Success Gaps Rubric* and implement an action plan one single time. Rather, your team should expect to carry on this work as a continuous cycle. As your team works through the process, you will benefit from periodically reassessing your district's or school's current operations by

- revisiting the data and the rubric with your team;
- assessing progress; and
- identifying new priorities.

Completing a set of goals in your action plan and updating the rubric annually can help you track progress and show improvement. Further, reassessing the status of your policies, procedures, and practices can help you think beyond the measurement of individual action steps to the evaluation of your efforts as a whole. Showing progress can help motivate your team in difficult times. Celebrate your successes as you work to develop systems that provide equitable opportunities to all groups of children and students.

For a checklist of action items within each step of the success gaps process, see [appendix J](#).



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Appendices

Equity, Inclusion, and Opportunity: Addressing Success Gaps

What Is a Success Gap?

Note: Leaders should share this handout with equity team members after they agree to participate.

A success gap is a difference in educational outcomes between different groups of children. An identified success gap indicates that a district or school is not serving all groups of children equally well. For children in the affected groups, these gaps often result in poor outcomes, such as the following:

- increased dropout and lower graduation rates;
- lack of achievement in reading or math;
- decreased postschool outcomes such as employment rates and college completion;
- increased likelihood of disciplinary actions; and
- increased likelihood of identification of disability.

Gaps can exist between different racial/ethnic groups or relate to factors such as disability, English learners, low income, migrant, and other factors. Addressing success gaps requires a close look at issues of equity, inclusion, and opportunity.

Why Do Success Gaps Matter?

If your district or school data show success gaps, the gaps may indicate that the educational program it offers is not meeting the needs of all groups of children. When you allow success gaps to continue, they can lead to poor long-term outcomes for particular groups of children.

The *Success Gaps Toolkit* and Process

The *Success Gaps Toolkit* offers a student-focused continuous improvement process. At the center of the process is a success gap statement. The success gap statement summarizes the important information about the success gap—including the group of children experiencing the success gap, the area in which the success gap is occurring, and the data point that supports identification of the gap. To begin the process of addressing an identified success gap using the *Success Gaps Toolkit*, district or school leaders will work through these steps:

1. Assemble an appropriate team.
2. Prepare and share data about success gaps.
3. Determine actionable root cause(s).
4. Create an action plan.
5. Implement plan and monitor progress.



Equity, Inclusion, and Opportunity: Addressing Success Gaps

Equity Team Member Representatives

Leaders can use this form to brainstorm potential members whose varied perspectives would provide the best chance of identifying the policies, procedures, and practices that may be limiting opportunities for some groups of children. Keep in mind, teams should update team membership as appropriate if the team identifies additional needed representation to address the success gap(s) effectively.

Team member role	Description	Potential team members	Identified team members
Representative of the district or school	A designated representative of the district or school, often a curriculum director or school principal, who can influence change in policy and procedures, contributes to understanding of the education curriculum, and has knowledge of district or school resources.		
Family representatives	Persons who represent the group of children experiencing the success gap and will participate as full and equal members of the team.		

Team member role	Description	Potential team members	Identified team members
General education and special education professionals	Staff (both certified and classified) who work with a range of student groups, including those identified as part of the success gap (e.g., if the gap is between English learners and students who are not English learners, ensure that professionals working with both groups are represented), and who serve as an expert in universal instruction as well as multi-tiered intervention.		
Students	Students of an age and maturity level, with an interest in and willingness to participate, who can be included in meetings as appropriate.		
Educational professionals who can provide and interpret data	Individuals with experience collecting, analyzing, and explaining district and school data (e.g., school psychologist, school counselor).		
Community partners	Individuals from other child- and family-serving organizations, particularly those who can speak from lived experience to the issue relevant to the group of children identified in the success gap.		

Equity, Inclusion, and Opportunity: Addressing Success Gaps

Sample Email/Letter for Inviting Equity Team Members

Greetings!

[Insert name of SEA, District, or School] have been reviewing our student outcomes data and have become aware that our [state, district, or school] data show success gap(s) for children related to [area of concern—e.g., graduation rate] for [groups of children—e.g., Hispanic children], which may indicate that our educational program is not meeting the needs of all groups of children.

Addressing this success gap(s) requires a close look at issues of equity, inclusion, and opportunity. Therefore, [insert name of SEA, District, or School] is gathering a representative group of individuals to participate as members of an equity team.

This equity team will work together to problem-solve any system inequities in our educational system. Members of this team, each with unique perspectives, will review data, identify possible factors that contribute to differences, and create a plan to improve equity and reduce the gaps between groups of children. We would like to invite you to be a part of this team.

It is important that we have team members that represent the educational staff, families of children, district or school leadership, community, and children who are affected. Your participation as [identify role represented such as parent, community leader, etc.] is crucial to this work, and we would be honored if you would be willing to serve as an equity team member. Team members who agree to participate are expected to attend meetings monthly [or other determined frequency] for [duration] and actively participate in our work using a resource tool called the *Success Gaps Toolkit*.

If you would like to take part in this important work, please let us know by contacting [insert name and contact number] or emailing [insert email address]. We will send more background information to those confirming attendance before the first equity team meeting.

If you have any questions or need additional information, please let us know.

Sincerely,



Provide resources to review

This could be sent by postal mail or email depending on how you can contact your target group. If necessary, you can also direct people to documents on council or partnership websites.

Example information to send:

- *What Is a Success Gap?*
- *Team Member Organizational Meeting Roles and Responsibilities*

Equity, Inclusion, and Opportunity:
Addressing Success Gaps

Team Members: Organizational Meeting Roles and Responsibilities

Each equity team member is an important member of the team and plays a critical role as participant. Participants are the key stakeholders, with a vested interest in ensuring equitable opportunities for all children, and whom the district or school invites to participate. Participants work together to ensure the meeting is productive and the team achieves the desired outcome.

Their responsibilities include

- adhering to the agreed-upon terms of reference and norms of behavior;
- participating in discussions and decisionmaking; and
- resolving problems using a solutions-oriented focus.

Assigning organizational meeting roles to participants during the meeting will help guide the group processes, maintain momentum, and promote the best use of time. The table below identifies and describes these key roles.

Meeting role	Responsibilities	Assigned team member
<p>Equity lead</p> <p>Considerations for selection:</p> <p>It is generally helpful to identify an instructional leader who is well-liked by the district or school community and has both influence and authority for decisionmaking, such as a curriculum director, assistant superintendent, or building principal.</p>	<p>Key functions</p> <ul style="list-style-type: none"> • Shepherds the work of the equity team to review and understand the data related to the success gap(s). • Makes sure the team determines the actionable root causes. • Spearheads improvement efforts. <p>Typical actions</p> <ul style="list-style-type: none"> • Determines the data to use as the starting point. • Identifies participants and key responsibilities. • Arranges meeting dates and locations. • Prepares and distributes the agenda before the meeting. • Provides stakeholders with an after-meeting summary that includes next steps. <p>Note: The equity lead may act as the facilitator or may choose to identify another individual as the facilitator so the lead can attend the meeting as a participant.</p>	



Meeting role	Responsibilities	Assigned team member
<p>Meeting facilitator</p> <p>Considerations for selection:</p> <p>The facilitator can be internal staff or outside support, such as an IDC technical assistance (TA) provider.</p>	<ul style="list-style-type: none"> • Works with the equity lead to identify objectives and the agenda for the team meeting. • Leads the team in identifying group norms. • Keeps the meeting focused on the agreed-upon objectives. • Helps the team focus and manage time for discussion in accordance with the agenda. • Creates a safe space for discussing sensitive topics. • Ensures that all voices are heard and valued. • Collaborates with the equity lead to reflect on whether the team accomplished the meeting objectives and what support the team will need to accomplish any next steps. 	
<p>Data lead</p> <p>Considerations for selection:</p> <p>The person should have knowledge about and access to all relevant data. Persons in this role include a data manager or lead data collector in area of success gap.</p>	<ul style="list-style-type: none"> • Works with the equity lead and meeting facilitator to prepare data for each meeting and is available during and between meetings to provide data to all team members. • Presents the data needed to inform the discussions in an accessible and easily understood way. • Explains the instructional implications of the data. 	



Meeting role	Responsibilities	Assigned team member
<p>Notetaker</p> <p>Considerations for selection:</p> <p>This person should have the ability to capture important points and decisions without becoming a verbatim transcript of the meeting.</p>	<ul style="list-style-type: none"> • Listens objectively. • Captures the group memory during the meeting. • Accurately records team decisions. • Provides a copy of the notes to team members after each meeting. 	
<p>Timekeeper</p> <p>Considerations for selection:</p> <p>This can be the person selected as the notetaker or the facilitator, or it can be a person who holds the role as a singular responsibility.</p>	<ul style="list-style-type: none"> • Assists the facilitator in moving the group through the agenda. 	

Equity, Inclusion, and Opportunity: Addressing Success Gaps

Example: Group Norms for Equity Team Meeting

Teams do not need a lot of established norms to work well together, but having agreed-upon expectations that the team applies consistently can significantly improve how your team solves problems and makes decisions. While the equity lead and meeting facilitator may sketch out initial plans for the work, the team may choose to develop these agreed-upon norms together. Below are examples of norms that might be created through team dialogue and discussion.

- **Be present and prepared.**
 - Arrive on time to the meeting and when returning from breaks.
 - Be present and attentive to the business of the meeting.
 - Be prepared to contribute to the conversations to achieve the meeting goals.
- **Contribute to the goals of the meeting.**
 - State your views and ask genuine questions.
 - Seek to understand everyone’s perspectives and be curious about the differences in their views.
 - Respect the teams’ time and keep comments concise and to the point.
- **Focus on shared interests and the problem, not positions.**
 - Respectfully challenge an idea, not the person.
 - Move from arguing about solutions to solving a problem by identifying needs.
 - Disagree, respectfully and openly, and without being disagreeable.
 - Discuss the critical but often undiscussed issues that are hindering the progress of the team.
 - Converse honestly and constructively.
- **Explain your thinking.**
 - Share all relevant information.
 - Use specific examples and, as a team, seek to agree on what important words mean.
 - Avoid using idioms, acronyms, and phrases that others can misunderstand.
 - Test your assumptions and inferences by asking questions and seeking clarity.
- **Listen with an open mind.**
 - Seek to hear input from all participants, and be patient when listening.
 - Value learning from the other voices in the discussion.
 - Stay open to new ways of thinking or of doing.

Equity, Inclusion, and Opportunity: Addressing Success Gaps

Template for Recording Equity Team Meeting Notes

The notetaker can use this template to capture discussions, recommendations, and decisions. In advance of the meeting, the equity lead can fill in known information about the agenda. The facilitator or another team member can project the template during the meeting so all participants can view the notes the notetaker is recording.

Meeting Date:

Focus Question: [from the agenda]

Attending today's meeting

[list who is present]

Updates

[document any updates on previous meeting items]

Agenda item [add item from agenda]

Discussion: [document the main points of the team's discussion]

Decisions: [document any decisions made by the team]

Actions: [document any actions needed, along with target date and person responsible]

Agenda item [add item from agenda]

Discussion: [document the main points of the team's discussion]

Decisions: [document any decisions made by the team]

Actions: [document any actions needed, along with target date and person responsible]

Agenda item [add item from agenda]

Discussion: [document the main points of the team's discussion]

Decisions: [document any decisions made by the team]



Actions: [document any actions needed, along with target date and person responsible]

Next steps

[document any next steps or agenda items for the next meeting]

Meeting evaluation

What went well today?

What would we like to improve?

Template for Refining the Initial Success Gap Statement

Refining the success gap statement to be more precise and descriptive will help the equity team think specifically about the barriers and challenges the children experiencing the success gap face. This analysis is critical as the team begins to explore the root causes in the district’s or school’s systems and structures.

Below is a template the equity team can use to refine the success gap statement.

Initial success gap statement:	
What is happening?	
Whom does the problem affect?	
Where is the problem occurring?	
When is the problem occurring? How often?	
To what extent is the problem occurring? What is the current level compared to the desired level?	
How do you know? What evidence supports your statement?	
Refined success gap statement:	

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Completing the *Success Gaps Rubric*

Working with the *Success Gaps Rubric* helps the equity team reflect on how current systems and practices in its district or school are affecting educational opportunities for the group of children the team is focusing its success gaps work on.

Equity leaders can use this handout to provide direction to equity team members as they complete the *Success Gaps Rubric*. Following is a description of the steps for completing the rubric:

1. Each team member should review and complete the sections of the rubric prior to discussing the rubric as a team. Team members should
 - a. answer all the probing questions to guide them as they research and develop their ratings;
 - b. keep in mind the group of children experiencing the success gap as they answer these questions and consider the rubric; and
 - c. note the evidence they are using to determine their rating. (It is important that each team member document evidence, supported by data or other facts, to ensure the broadest perspective when the team convenes.)
2. Team members will then discuss their individual ratings for each item with the entire team, reach an agreement on the rating, and note the rating in the final rubric. Together, the team should
 - a. use the probing questions to help drill down into each item; and
 - b. include the evidence it is using to determine its rating. Evidence should be objective facts, supported by data, related to both the item and the group of children experiencing the success gap.
3. Once the rubric is complete, the team will create its theory about actionable root causes it uncovered using the rubric and any other data the team considered.
4. The team will then prioritize areas for improvement based on its assessment of the root causes that (1) they have the capacity to address, and (2) will most effectively remove the barriers to student success, or close the success gap.

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Template for Success Gap Action Plan

Equity teams can use this form to develop an action plan that describes goals, tasks, and timelines for addressing the root causes. Keep in mind, a well-thought-out action plan will help the team stay on track amidst competing priorities, predict and neutralize potential barriers, and measure progress toward goals.

Success gap statement	
Identified root cause	
<u>SMART</u> goal (<i>specific, measurable, actionable/attainable/aligned, reasonable/realistic, and time-bound</i>)	

Action Steps

Action item	Due date	Person responsible	Status update



Action item	Due date	Person responsible	Status update

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Success Gaps Toolkit Checklist

Success gap process	Action items
Identify success gap(s)	<input type="checkbox"/> Identify success gap(s) and create an initial success gap statement
Form a team	<input type="checkbox"/> Identify needed representation based on the success gap <input type="checkbox"/> Invite team members
Prepare and share data about the success gap to uncover details needed to refine your success gap statement	<input type="checkbox"/> First team meeting <ul style="list-style-type: none"> <input type="checkbox"/> Schedule meeting <input type="checkbox"/> Prepare agenda <input type="checkbox"/> Prepare data to share <input type="checkbox"/> Determine group norms <input type="checkbox"/> Assign roles and responsibilities <input type="checkbox"/> Refine initial success gap statement <input type="checkbox"/> Introduce rubric <input type="checkbox"/> Determine additional data needed <input type="checkbox"/> Create schedule of team meetings and determine additional people needed for scheduled meetings <input type="checkbox"/> Data collection <ul style="list-style-type: none"> <input type="checkbox"/> Collect all needed data <input type="checkbox"/> Share collected data with team members
Use your team, data, and the rubric to determine actionable root cause(s)	<input type="checkbox"/> Rubric completion in multiple meetings <ul style="list-style-type: none"> <input type="checkbox"/> Complete rubric individually <input type="checkbox"/> Meet to consider and discuss ratings <input type="checkbox"/> Collect evidence and use to come to an agreement on ratings <input type="checkbox"/> Root cause(s) <ul style="list-style-type: none"> <input type="checkbox"/> Review all collected data, evidence, and rubric ratings <input type="checkbox"/> Identify possible root cause(s) <input type="checkbox"/> Prioritize actionable root cause(s)

Success gap process	Action items
Develop an action plan	<ul style="list-style-type: none"> <input type="checkbox"/> Write goal statement <input type="checkbox"/> Outline action steps <input type="checkbox"/> Determine timelines <input type="checkbox"/> Determine progress-monitoring data needed <input type="checkbox"/> Create evaluation plan <input type="checkbox"/> Share action plan with relevant stakeholders
Implement plan and monitor progress	<ul style="list-style-type: none"> <input type="checkbox"/> Schedule monthly (or regular) meetings <input type="checkbox"/> Identify needed data and which team members will provide updates at meetings <input type="checkbox"/> Create agendas for meetings <input type="checkbox"/> Review action plan at meetings and update completed items <input type="checkbox"/> Review collected data at meetings to evaluate effectiveness or needed adjustments to the action plan <input type="checkbox"/> Share progress with stakeholders