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A “Whole Child - Whole Schools - Whole Systems” Approach:
Building Coherence and Emergent Cross-Functional Collaboration

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by
Bonnie Lo

To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
Doctor of Education Leadership.

April 2020
“The journey of a thousand miles begins with a single step.”
- Lao Tzu, Tao Te Ching

To our educators and youth across our nation:
Our systems are broken and fragmented, seeped and dripping in inequity.
You are our hope for a better today and tomorrow.
Acknowledgments

To Dr. Deborah Jewell-Sherman, for all the ways you model excellence and equity in education - and for surfacing diamonds out of simple, tattered boxes.

To Dr. Irvin Scott, for pushing me to think more innovatively about sector change and transformation in our educational ecosystem.

To Superintendent Dr. John Deasy, for your brilliant mind, mentorship, and dynamic, social-justice leadership, which drives people to be and do their best.

To Stockton Unified School District’s Executive Cabinet, Educational Services Team, Student Support Services Team, and Community Relations for your passion and dedication to serving the academic and holistic needs of our 37,000 children and youth.

To my father Reverend Dr. Samuel Lo, for taking the step to journey from Hong Kong in the mid-1960’s to establish and lead a church in Los Angeles, where people could gather in their native language. Over 50 years later, community members are still congregating at Chinese Evangelical Free Church. As a licensed psychologist in the Asian American community, you have been a pioneer in bringing awareness of mental health services and a holistic approach.

To my mother Helen Lo, for serving our community as an English as a Second Language Teacher for adults over the span of three decades. A classroom is not only an educational facility, but functions as a home to many seeking to better their current and future selves. You have been instrumental in my journey in becoming a transformational systems-leader. Every step of the way, I have been covered in prayer and encouragement.

To all the mentors, colleagues, family, friends and individuals in my life - including Harvard Graduate School of Education’s Doctor of Education Leadership Program faculty, staff and colleagues; University of California Berkeley’s Principal Leadership Institute; University of California Los Angeles’ Teacher Education Program; San Francisco Unified School District; and El Camino Academy in Bogotá, Colombia - for being a force of true inspiration.

I am deeply grateful and moved by your immense support.
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Abstract

There is a growing need across PreK-12 urban school systems in the United States to support and create the conditions for academic, social, and emotional success for children and youth of subgroups who have historically been marginalized. In public school organizations with high leadership churn, how might central office systems-level leaders set the stage within and across departments for increased coordination of resources to serve the whole child? Situated in California’s San Joaquin Valley, Stockton Unified School District (SUSD) is a Title I PreK-12 public school system located in a city most recently named by U.S. News and World Report (2020) to be “the most diverse city.” Unfortunately, high diversity doesn’t necessarily equate to high equity; according to a study by Brandeis University (2020), Stockton ranked as fourth in our nation in terms of the Child Opportunity Index 2.0, which reveals pervasive geographic and racial inequities.

Through the “Whole Child Bridge” strategic project in SUSD, I designed and operationalized multiple collaborative meeting structures and relevant professional learning opportunities for key executive and senior central office leaders charged with guiding the academic, social-emotional and wellness of nearly 37,000 students. The multi-dimensional evidence collected includes the analysis of individual surveys, focus group interviews, 101 audio reflections, and an initial and final survey where participants indicated that within half a year, the “level of collaboration, communication and alignment between Educational Services and Student Support Services” increased by 200% from 3.1 to 6.2 on a ten-point scale.
Implications for the project incorporate the National Equity Project’s “Seven Circle Model” for equity-based systems change, and are aligned with Aspen Institute’s Commission on Social, Emotional, & Academic Development’s integrated whole child approach. I conclude with the recommendation that school systems find ways to couple initiatives with the intentional and visible integration of a student-focused, equity-based lens that incorporates cultural responsiveness and restorative practices. Investing in adults’ understanding of race and equity in all interactions, including those with colleagues within and across the central office towards a coherent mission, is necessary for all youth to be successful in our nation’s schools.
Introduction

“School systems are terribly fragmented…. The organization lives in the minds and the habits of the people in it. It’s very difficult to change minds and habits. When you’re talking about changing organizations, you can’t just do it by telling people, it won’t work because among other things, they don’t know how to behave differently.”

(D.K. Cohen, communication, February 28, 2020)

In July 2019, as a doctoral resident in the Harvard Doctor of Education Leadership (Ed.L.D.) program, I was invited to participate in the Superintendent’s Executive Cabinet at Stockton Unified School District in California. I took on a role similar to a chief of staff position for the Assistant Superintendent of Educational Services. During the 10-month residency, I was able to build on the experiences and the successes I had previously acquired through school systems leadership in the Bay Area, California, and internationally. Through the strategic project, I invested in the development of individual and collective efficacy around SUSD’s vision and mission by creating, co-designing, implementing, and operationalizing the following emergent structures:

1. Education Services Leadership Team
2. Educational Services Executive Leadership Team
3. Education Services Executive Assistant Team
4. All Educational Services Monthly Team
5. Whole Child Bridge Team
6. School Culture Bridge Leadership Team

The strategic project focused on building the leadership capacity, coherence, and deepened learning and application of an integrated social-emotional, academic development “whole child” approach through collaborative structures within and across three main departments: Educational Services, Community Relations, and Student Support Services. Table 1 further clarifies the terminology of these departments. Community Relations identified as a separate
department. However, in order to simplify and streamline terminology, I will house Community Relations under Student Support Services (also known as “Student Services”).

Table 1

Organizational Chart of Educational Services and Student Support Services

<table>
<thead>
<tr>
<th>Educational Services</th>
<th>Abbreviation: Ed. Services</th>
<th>Student Support Services</th>
<th>Abbreviation: Support Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>110+ central office colleagues</td>
<td>135+ central office colleagues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>School Supervision / Monitoring</td>
<td></td>
<td>Student Support Services</td>
<td></td>
</tr>
<tr>
<td>- Regional Directors</td>
<td>- Child Welfare &amp; Attendance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Research and Accountability</td>
<td>- Centralized Enrollment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- State &amp; Federal</td>
<td>- Families, Youth in Transition</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Early Education</td>
<td>- Counseling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- College, Career, Community, CTE*</td>
<td>- Mental Health Clinicians</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Adult Education</td>
<td>- Student Support Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Health Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Curriculum and Instruction</td>
<td>Special Education</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Professional Development</td>
<td>- SELPA*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Language Development</td>
<td>- Pre-School</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- After School Program</td>
<td>- Assessments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Native American Program</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Teacher Induction Program</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- AVID*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- STEM*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Visual and Performing Arts</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>- P.E. and Athletics</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>- Equity</td>
<td></td>
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<td></td>
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<tr>
<td>Communication Relation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Communications &amp; Marketing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Parent Liaisons</td>
<td></td>
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</tbody>
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Note: *The abbreviations are: Career Technical Education (CTE), Advancement Via Individual Determination (AVID), Science, Technology, Engineering and Math (STEM), and Special Education Local Plan Area (SELPA)

School systems have been built around limited government and domestic affairs. When the progressives early in the 20th century set about turning these localized ward-based systems into something coherent, systems leaders didn’t have a lot of capacity or political strength. As these historic reformers tried to build capacity, they did it in silos around these professional subspecialties. As Table 1 shows, school systems have a number of specialties or wards within the system,
including the division of Educational Services, Support Services, and Community Relations. Within these specialty areas, SUSD also finds itself in the conundrum of subspecialties situated within these divisions.

As stated by the Assistant Superintendent of Ed. Services, “Based on Fullan’s research, coherence relies on building collaborative structures and recognizing both the individual and collective needs. It’s less about managing behaviors and more about building an environment conducive to learning” (communication, February 28, 2020). Prior to the commencement of the strategic project, the only formal structure of those listed that existed was the Ed. Services Leadership Team. In previous years, meetings structures were inconsistent. The design of the emergent structures in Table 2 was intentionally aimed to disrupt the siloed structures of the nature of how public schools originated.

Table 2

*Structures Created and Operationalized*

<table>
<thead>
<tr>
<th>Collaborative Structure</th>
<th>Frequency</th>
<th>Who Attends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational Services Leadership Team</td>
<td>Biweekly</td>
<td>20 Directors of Ed. Services</td>
</tr>
<tr>
<td>Educational Services Executive Leadership Team</td>
<td>Monthly</td>
<td>Assistant Superintendent + 2 Executive Directors of Ed. Services</td>
</tr>
<tr>
<td>All Ed. Services Monthly Team</td>
<td>Monthly</td>
<td>20 Directors + 15 Key Leaders from Ed. Services</td>
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<tr>
<td>Education Services Executive Assistant Team</td>
<td>Weekly</td>
<td>3 Executive Assistants of Ed. Services</td>
</tr>
<tr>
<td>Whole Child Bridge Team</td>
<td>Monthly</td>
<td>40 Key Leaders from Ed. Services and Student Services</td>
</tr>
<tr>
<td>School Culture Climate Leadership Team</td>
<td>Biweekly</td>
<td>6 Ed. Services Key Leaders + 12 Support Services Leaders + 2 School Administrators</td>
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</table>
Background & Organizational Context

Stockton Unified School District’s (SUSD) Mission: To graduate every student college, career, and community ready. In doing so, we will lift all youth out of circumstances of poverty and scarcity.

The City of Stockton: Located in San Joaquin County in the Central Valley of California, Stockton is the 13th largest city in California. It is historically situated within an inequitable infrastructure, including housing, health, and safety. Stockton was named by Forbes to be the fifth most dangerous city in the U.S. in 2009 due to its crime rate. Along with new leadership in city governance, there has been some progress a decade after, and Stockton is now ranked ninth highest in violent crimes (Statista, 2019). Despite the 3,000+ shelters that serve a city of 320,000 residents, homelessness and poverty are visible in the community (Shelter Listing, 2019). Initiatives such as the city’s basic economic plan highlight the lack of financial resources. Fortunately, there are people in the community who are driven and passionate about bringing about positive change in Stockton, and the Superintendent of Stockton Unified School District (SUSD) has been working to bring in additional resources to the community.

SUSD’s Demographics and Data: According to Stockton Unified School District’s website (2019), SUSD consists of 54 schools and 4,000+ employees that serve 37,000+ students with a budget of over $585,000,000. SUSD demographics include “63% Hispanic, 14% Asian, 11% Black/African American, 7% White and 5% Other.” In addition, the student population consists of 82% in high poverty, 29% English learners, 8.5% Special Education, 2% homeless, and 1% foster youth. The California Dashboard accountability system shows the following information:
78.6% graduation rate, 18.1% chronic absenteeism, and 21.2% college and career ready.

**Momentum for Change:** Sparked by the visionary leadership of SUSD Superintendent John Deasy, Mayor Michael Tubbs, and community-based organizations including Stockton Schools Initiative, Reinvent Stockton, and Stockton Scholars, there is a great hunger and desire for change. As an example, SUSD partnered with San Joaquin Regional Transit District (RTD) to provide free bus passes for all 7th-12th grade students in an effort to battle chronic absenteeism. Aiming to provide a more equitable infrastructure for the city of Stockton, Superintendent Deasy has worked on cross-sector initiatives.

At the start of the 2019-2020 school year, Superintendent Deasy invited all employees to commit to the district’s motto: “Small Acts, Big Change.” The district-wide initiative empowered each SUSD employee to be part of a change effort of their choice under the premise that when combined, each individual action would lead to collective transformation. SUSD’s school board had hoped to work as a unified change unit. In fact, board members initially espoused that they strived for 7-0 votes on board decisions. However, in practice, there has been a strong correlation between individual board member decisions and support or opposition of the mayoral administration. Sustainability is key – Superintendent Deasy has been the first superintendent in 10 years to stay longer than one year. The Executive Cabinet Team is committed to building and setting the structures and systems to make SUSD’s mission a reality. In the past 10 years, there have been nine Superintendents.

As stated by Dr. Deasy and key leaders of the organization, Stockton’s school system is “obsessed with improving the quality of teaching and learning.” Under
Dr. Deasy’s leadership, the school system purchased two newly adopted English Language Arts and math curricula and provided professional development opportunities for all teachers and administrators. In January 2019, the California Department of Justice (DOJ) settled a complaint against SUSD for “system-wide violations of civil and constitutional rights of African American and Latino/a students and students with disabilities.” SUSD also hired 31 new mental health clinicians with the aim to strengthen wrap-around services to support students. Appendix A provides more detailed information on SUSD’s “Nine Rocks” (See Figure 1), Theory of Action, Theory of Instruction, Theory of Change, and Equity Agenda.

**Figure 1**

*SUSD’s “Nine Rocks Priorities”*
An Opportunity for Change

Based on comprehensive conversations with SUSD’s Superintendent, Executive Cabinet members, board members, central office staff, site administrators and community members, the key problem of practice is the inherited siloed nature of the organization, fostered by a flurry of leadership change; this fractured infrastructure is specifically prevalent between the ~400 central office members who work within and across the Ed. Services and Support Services departments. The problem opens a window of opportunity for SUSD to build and develop sustainable systems and structures that would lead to increased clarity of what it would mean to truly live out the school district’s vision and mission. Dr. Deasy has been the first superintendent in nearly a decade to stay longer than a year. In addition, 75% of the Executive Cabinet members and school supervisors have been in their SUSD leadership roles for less than one year.

Due to the constant churn of leadership, it has not been uncommon for some central office departments to focus on their individual programs and services, while working in silos within their own departments. District-based accountability systems, guidance, and expectations have also changed on a yearly basis. Also, although many school districts across the nation shifted to common core standards nearly a decade ago, this is the first year that central office leadership has provided teachers with training using a newly adopted standards-aligned curriculum for English Language Arts and math.

Why might a school system roll out two curriculum adoptions coupled with culturally responsive pedagogy-based training within one year? As stated by the Assistant Superintendent of Education Services, who adapted a quote by Maya Angelou, “When we know more, we do better” (communication, August 6, 2019).
With the number of new initiatives and new members to new roles, teachers, site, and central office leaders have asked for more clarification on communication channels and processes during this transition. If SUSD is to lift all youth out of poverty and scarcity (the “why”), an Integrated Instructional Framework would need to be clearly spelled out (the “what”) and understood by central office departments so that resources and supports could be more effectively coordinated and operationalized (the “how”). SUSD has been developing metrics and working avidly to coordinate their resources toward the alignment of their mission.

The strategic project provided an opportunity for me to initiate action and drive change. I explored “three key questions” with executive and senior systems-leaders across departments:

1. What are the essential ways that central office departments in school districts organize their structures and systems to enact aligned and coordinated support for schools?
2. How do central office departments in public school systems grow as a learning organization and build coherent, collaborative, and cross-functioning systems and structures that foster a whole-child approach?
3. In school organizations with high leadership churn, how might central office departments set the stage for increased coordination and alignment of resources to serve the whole child?

Initial leadership actions included engaging in the Review of Knowledge for Action in order to research relevant and foundational literature, frameworks, current practice, and promising strategies.
**Review of Knowledge for Action**

This Review of Knowledge for Action (RKA) explores research, strategies, and literature related to answering the overarching question: *What conditions would best position school systems to build emergent cross-functional collaboration and increased coherence through a “Whole Child - Whole Schools-Whole Systems” approach?* Since SUSD’s initial theory of change included a vision of alignment before a district-wide system of autonomy, the crux of all “three key questions” is related to strengthening coherence and meaning-making at the central office-level, which would then cascade across the school system.

Figure 2 illustrates how the RKA is further organized into four areas:

1. Coherence and Alignment
2. Whole Child Approach,
3. Building Effective, Emergent Cross-Functioning Teams
4. Learning Organizations

School systems-level leaders all over our nation are working to strengthen coordinated, coherently aligned structures and supports for the whole child. Furthermore, this is even more challenging in an organization like SUSD since it has experienced such a high rate of leadership churn and inherited a siloed structure. The following sections in the Review of Knowledge for Action will uncover research related to the four focal areas.
Figure 2

Four Focal Areas of the Review of Knowledge for Action

1) Coherence and Alignment
   ● What are the essential components of coherence and alignment?
   ● Why might coherence and alignment be valuable in school systems?

2) Whole Child Approach
   ● What are the essential components of the whole child approach?
   ● What might coherent whole child systems look like? What effective Integrated Instructional Frameworks (e.g., one that includes multi-tiered systems and supports, culturally responsive pedagogy, community-based schools, and whole child strategies) exist?

3) Building Effective, Emergent Cross-Functioning Teams
   ● What are the essential components of building effective emergent teams?
   ● How might collaborative structures build coherence?

4) Learning Organizations
   ● What are the essential components of learning organizations?
   ● How might learning organizations build coherence and collaboration?

Coherence and Alignment
   ● What are the essential components of coherence and alignment?
   ● Why might coherence and alignment be valuable in school systems?

Since the SUSD colleagues were interested in building cohesive structures within and across departments, I researched books, articles, and frameworks in search of providing various angles that would support this focus. Starting with case studies was especially helpful in bridging theory and practice. Case studies also posed lived examples of the processes involved in organizational change.

Case studies that build coherence based on a clear, compelling vision, core values, and inclusive leadership: In the emergent airline business sector decades ago, former-CEO of SAS Airlines Jan Carlzon had an ability to espouse
and enact an organization’s vision in an impactful way. The “Jan Carlzon” case study by John Kotter (2001) takes excerpts from the autobiography written in 1987 by Jan Carlzon. The study commences with a situation reflecting an evident lack of shared responsibility across the organization. The first thing that CEO Carlzon did was shift the focus of the company’s core value from product-oriented to customer-oriented. Jan Carlzon set a clear goal of becoming “the best airline in the world for the frequent business traveler” (Kotter, 2001, pp. 4-5). CEO Carlzon inspired the organization to be “100% better at one thing instead of being 1% better at 100 things” (Kotter, 2001, p. 5).

Jan Carlzon also diffused responsibility and empowered front-line personnel by making sure that everyone understood the vision. 20,000 copies of the “Little Red Book: Let’s Get in There and Fight” was given to all the employees (Kotter, 2001, p. 6). CEO Carlzon positioned people throughout the company to take ownership of the vision; he encouraged employees closest to the problem to analyze situations and determine appropriate actions based on the organization’s shared vision and core values.

Citizen Schools was also clear, persistent, and tenacious about their vision. In the “Citizen Schools” case study, the founders stated, “The first four to five years of our work was intensive advocacy for the mission. We were in the belief business, and faced a lot of skeptics” (Higgins, M., Grossman, A. & Friedrich, P., 2015, p. 5). They went on to scale a belief that connected students from less privileged communities to access increased opportunities in their neighborhoods. From a compelling vision, Citizen Schools disrupted the educational system by creating an innovative after school program that was not in place prior to 1995.

Question: What was consistent? Answer: A clear vision with the end goal to see
students from less privileged areas succeed. Through community partnerships, mentorship and academic support, Citizen Schools stayed true to their core values, vision, and commitment to close the opportunity gap.

**Enact a coherent alignment of the vision to context-based strategy, structures, and support through internal accountability:** In building coherence in school systems, there is much evidence that purports that internal accountability may be more effective than external accountability. Hargreaves and Shirley (as cited in Fullan & Quinn, 2016, p. 111) suggest that “internal accountability must precede external accountability if lasting improvement in student achievement is the goal.” During the project, I also came across additional research that shifted my understanding of coherence and alignment.

Fullan and Quinn (2016) define what coherence is not: “It is not structure. It is not alignment (although that can help) as when those in charge can explain how things fit (really, how things should fit from their perspective). It is not strategy” (p. 1). The authors define coherence based on Merriam-Webster as the “integration of diverse elements, relationships or values,” and explains that overload, fragmentation, and policy churn can act as obstacles (Fullan & Quinn, 2016, p. 1). Furthermore, it is inherent that individuals find ways and processes to engage in meaning-making, connection, and shared depth of knowledge about the purpose and nature of the work. Forman, Stosich and Bocala (2018), provide details on ways to build internal coherence through leadership practices (e.g., leadership for learning, psychological safety, and meaningful professional development) as well as organizational processes (e.g., collaboration around improvement strategy, educators involved in decisions, and sharing understanding of effective practice).
Two Frameworks that Support Coherence

When looking into coherence, there are two frameworks that have been widely utilized by school systems across our nation with proven results. Anthony Bryk’s (2010) “Organizing Schools for Improvement” Framework (See Figure 3), explains the dynamic relationship between leaders as the drivers for change and student outcomes, which includes enhanced engagement in learning and expanded academic learning (2010). Between the leader’s input and the student outcomes lies the box of intricate levers and dynamics, including:

1. Classroom Instruction
2. Instructional Guidance
3. School Learning Climate
4. Professional Capacity
5. Parent, School, and Community Ties

The arrows in Figure 3 show that all of these levers depend on each other. In addition, each element influences the effectiveness of classroom instruction, which includes what City, Elmore, Fiarman and Teital (2018) refer to as “The Instructional Core,” which is the relationship between teacher, student, and content around the task. To maximize the capacity of these levers to work in an ideal way, there has to be relational trust across the school system, and one must keep in mind the local community context. It seems so simple to get all of these levers right, yet elements of trust, building of school system teams, and coherence of vision and mission across the district and schools must be tightened up.
Each year Harvard Public Education Leadership Project (PELP) selects a dozen of our nation’s largest school systems and works with teams towards equitable outcomes. The PELP Framework in Figure 4 furthers our thinking on how central-office leaders can structure ways to support schools by enacting a coherent alignment of the vision to the strategies, structures, and support (Childress, Elmore, Grossman & King, 2011). The PELP framework shows us that, although schools exist in an environment that includes regulations, statutes, contracts, funding, and politics, at the center of it all is: the instructional core (i.e., the student, teacher, content around the task). It is critical to first start with the instructional core - the relationship between teachers, students, and content - as our instructional vision before building out the theory of change. From there, strategy is aligned to this instructional vision and theory of change, which then
looks into the interconnectedness of structure, systems, resources, stakeholders, and culture as an integral part; the key here is coherence and alignment.

**Figure 4**

*Harvard Public Education Leadership Project (PELP) Framework*

As stated in Duggan and Holmes (2000) “Closing the Gap” special report, Former Superintendent Vicki Phillips from Lancaster, Pennsylvania reminds us that “leadership comes from everywhere” (p.13) and acknowledges the evidence of alignment and coherence through assessments, professional development, structures, and systems within schools and among networks of schools. The complexity of the work of coherence building continues to be a challenge for many school systems across the nation, and all of these areas must have thoughtful and strategic approaches (p. 17):

1. Helping Every Student Reach High Standards
2. Improving Educator Capacity
3. Accountability and Assessment Systems
4. Public Will / Community Engagement
School systems are complex and messy due to the number and flux of initiatives, leadership change, and reform efforts. Bryk, Gomez, Grunow, and LeMahieu (2015) elevate the concept that success and failures are dependent on multi-level interactions and processes: “This systems view drives home a clear but often ignored point: the causes of students’ success and failures are not simple. Educational outcomes emerge from multiple processes that interact in classrooms, schools and districts and in families, community organizations, and public social services. Moreover, every few years a new set of reforms is enacted on top of previous changes and those on top of more distal changes. This ever-increasing complexity continues to generate new vexing problems to solve. This is hardly a new insight, but its implications for practice and policy regularly go unattended” (pp. 63-64).

What happens when we don’t see coherence and alignment in school systems? When school system leaders are not working together to articulate a clear, compelling vision based on core values, clarity on the purpose and the “WHY” become blurry. In addition, members may not have a strong sense of what their organization stands for and what important part they play. Without a clear North Star, members may not know what their focus is and what they are working towards.

Finally, if leaders do not enact a coherent alignment of the vision to strategy, structures, and supports that take into account the specific context, members of the organization can become disenfranchised. In terms of what comes first, building coherence through meaning-making and understanding is the initial step. Processes should be developed, utilized, adapted, and in place to sustain the building of coherence in systems-wide change efforts.
Whole Child Approach

- What are the essential components of the whole child approach?
- What might coherent whole child systems look like?
- What effective Integrated Instructional Frameworks (e.g., one that includes multi-tiered systems and supports, culturally responsive pedagogy, community-based schools, and whole child strategies) exist?

According to Aspen Institute’s (2019) National Commission on Social, Emotional, & Academic Development Report “From a Nation of Risk to a Nation of Hope,” the whole child approach focuses on rigorous academic content and learning experiences. In addition, instead of merely focusing on academics - or the traditional instructional triangle of teacher, student, and content around the task - the whole child starts first with the child as the center of learning. As displayed in Figure 5, Aspen Institute posits that, in order to serve the whole child, educators need to pay careful attention to supporting students simultaneously in three areas:

1. Cognitive Skills and Competencies
2. Emotional Skills and Competencies
3. Social and Interpersonal Skills and Competencies

In addition, character, values, attitudes, beliefs, and mindsets play a significant role in each student’s learning. Aspen Institute’s most recent report from November 2019 also adds that racial equity must be at the center of the whole child approach in order to see gains in outcomes.
Aspen Institute’s 2019 Report also identifies a number of organizations and stakeholders involved in creating the conditions for students, schools, and organizations to serve the whole child (See Figure 6). Aspen Institute includes six recommendations:

1. Set a clear vision that prioritizes the whole child
2. Transform learning settings so they are safe and supportive for youth
3. Change instruction to social, emotional, and academic skills
4. Build adult expertise in child development
5. Align resources and leverage partners in the community
6. Forge closer connections between research and practice
I hoped to discover a research-based Integrated Instructional Framework that would coalesce Multi-Tiered Systems and Supports, culturally responsive pedagogy, community-based schools, and whole child strategies, but was unable to procure a comprehensive model; instead, mirroring our school systems, the frameworks that resulted were also compartmentalized. There are integrated approaches such as Zaretta Hammond’s (2015) Culturally Responsive Pedagogy and articles on making math more humane; however, frameworks that incorporate academic, social-emotional, culturally responsive, wellness, and community within a school day experience are not yet packaged in a truly integrated way.
Tangible findings based on the research of this Integrated Instructional Framework idea were derived from school systems visits and practice-based visits. During Fall 2017, I was part of a team of doctoral education leaders from Harvard Graduate School of Education led by Dr. Andrés Alonso. Our team visited and provided recommendations for numerous school systems in the Boston area. During a school visit, a Brooke Roslindale School administrator shared that the charter school organization values “making students known” (communication, 2017). Although the school outcomes were one of the highest for Black and Latinx students in the state-wide assessment, classroom pedagogy often verged on being overly scaffolded, controlled and structured during the visit. We encouraged the dedicated educators at Brooke Roslindale to think of ways to integrate making students known by allowing students to bring in their own narratives in their writing, through shared stories, and with further connections to learning. Brooke Roslindale site administrators stated that the school cared for “Kids understanding their own identity as learners,” including “Who am I as a kid?” and “How does that impact who I will be?” (communication, October 2017).

It would behoove us to think more about how we might integrate our students’ and families’ lived experiences with individual, familial, and cultural identities in school in a deeper way. In Stockton-based school learning visits with the SUSD Executive Cabinet, I observed teachers aiming to utilize the new curriculum according to pacing guidelines. SUSD Executive Cabinet members and I also heard from site leaders, who felt penalized when teachers attempted to include AVID-based student engagement and differentiation strategies during walkthroughs led by a partner organization. According to AVID’s official website, the “Advancement Via Individual Determination” program aims to “untrack” and
support students primarily from low income and ethnic or linguistic minority backgrounds to become career and/or college ready through rigorous academic elective courses and curriculum for 7th-12th graders focused on writing, inquiry, collaboration, organization, and reading methodologies to accelerate student progress (AVID, 2020).

A whole child approach in the classroom also means that students should be able to interact and engage in critical thinking activities with others in the class. Stanford professor Carol Dweck (as cited in Saltman, 2012) supports student choice and autonomy as long as there is a focus on structures that promote the student’s belief in intellectual growth. Educators should first establish a framework to support students in challenging tasks so that learners do not choose to give up easily. In educating the whole child, on pg. 288 of “The Silenced Dialogue: Power and Pedagogy in Educating Other People’s Children,” Lisa Delpit (1988) examines the following themes related to the “culture of power”:

1. Issues of power are enacted in classrooms.
2. There are codes or rules for participating in power; that is, there is a “culture of power.”
3. The rules of the culture of power are a reflection of the rules of the culture of those who have power.
4. If you are not already a participant in the culture of power, being told explicitly the rules of that culture makes acquiring power easier.
5. Those with power are frequently least aware of -- or least willing to acknowledge -- its existence. Those with less power are often more aware of its existence.

School systems must think of ways to empower students in disadvantaged circumstances by bringing students into the process of acquiring power as they learn. If SUSD truly wants to lift students out of poverty and scarcity, we will need to find a way to create, use, and test out a framework that empowers students to build their agency and ownership of learning.
Building Effective, Emergent Cross-Functioning Teams

- What are the essential components of building effective, emergent teams?
- How might collaborative structures build coherence?

What might a high-functioning team look like? As we examine what elements comprise an effective cross-functioning team, I looked to past successful examples through case studies, current effective teams, and strategies. I was particularly interested in research that could inform future work specifically focused on new teams in the emergent phase.

Based on a case study of the Orpheus orchestra by Hackman, Gonzalvez, and Lehman (2002), which includes a video series documentary, findings point to the importance of building a community where all members could take an active part and voice their thoughts. Each Orpheus musician also had opportunities to take the lead, and the leader-role was rotated amongst the members of the community. Similarly, teams in schools do not have to take on an “always the same leader” approach, and an effective team is one where all individuals are able to contribute diverse ideas and perspectives in constructive ways. In addition, leadership experts Heifetz and Laurie (1997) assert that “instead of maintaining norms, leaders have to challenge the way we do business and help others distinguish immutable values from historical practices that must go” (p. 125).

What makes a Google team effective? During a span of over two years, Google conducted 200+ interviews with their employees, and examined more than 250 characteristics of 180+ Google teams. Google’s findings demonstrated the following: “Who is on a team matters less than how the team members interact, structure their work, and view their contributions” (re:Work, 2019). Five essential components, pictured in Figure 7, made a significant difference in team
effectiveness. Those teams who could answer affirmatively in the five dynamic areas were identified as a high functioning team:

1. **Psychological Safety**: Can we take risks on this team without feeling insecure or embarrased?
2. **Dependability**: Can we count on each other to do high-quality work on time?
3. **Structure and Clarity**: Are goals, roles, and execution plans on our team clear?
4. **Meaning of Work**: Are we working on something that is personally important for each of us?
5. **Impact of Work**: Do we fundamentally believe that the work we’re doing matters?

**Figure 7**

*Google’s Five Successful Elements of Effective Teams*
The reason why psychological safety is highlighted in Figure 7 is because it was by far the most important of the five dynamics. For emergent teams, starting with psychological safety is highly recommended. It is fundamental for team members to feel safe so that they will be able to take risks during conversations and while working on projects and tasks. Without psychological safety, members may feel hesitant to engage in actions that could negatively influence how others perceive their competence, value, and identity. According to re:Work (2019), individuals on teams with higher psychological safety were less likely to leave Google and more likely to “harness the power of diverse ideas from their teammates.” The members of effective teams brought in more revenue, and they were “rated as effective twice as often by executives…. Teams said that having a framework around team effectiveness and a forcing function to talk about these dynamics was missing previously and by far the most impactful part of the experience” (re:Work, 2019).

The use of “Meeting Wise” protocols and strategies can build coherence and increase the effectiveness of collaborative time for educators (Boudett & City, 2014). A common practice of “Meeting Wise” is clearly stating the objectives and outcomes of the meeting in the written agenda and transparently referring to the purpose and goals throughout the meeting. Roles such as the facilitator, timekeeper, notetaker, and norms-tuner are rotated. The facilitator often supports the co-creation of the agenda, which is designed to include activities and discussions that are aligned to the meeting outcomes and purpose. It is also common practice to have the organization’s norms, values, and mission written and stated on the agenda, and articulated throughout the meeting. The notetaker
further supports coherence by documenting, interpreting, and translating verbal information to written form. Meeting agendas and notes are stored in a way where all team members can pre-read and refer to the goals and activities during and after the meeting to ensure alignment with the organization’s vision and mission. Furthermore, these artifacts can be shared across departments and sites, which expands access to increased meaning-making and stronger coherence in the organization. An effective systems-level leader elevates the culture and performance of a cross-functional, collaborative team by promoting a cohesive community of life-long learners.

Learning Organizations

- What are the essential components of learning organizations?
- How might learning organizations build coherence and collaboration?

The primary function of school systems across the nation is to provide high-quality instruction and learning outcomes for students. In this section of the Review of Knowledge for Action, I researched case studies, literature, and frameworks to learn from past and current systems that focus on building the adult learner so that the effectiveness of the organization, process, and performance would be enhanced. Similar to building effective teams, learning organizations start with psychological safety, inquiry mindset, and practice.

In the “Children’s Hospital” case study, health administrative leader Julie Morath encouraged the health care system to be a learning organization. Through the “no fault reporting” strategy, Morath fostered the psychological safety needed to encourage other employees to share when they had failed, and this made their organization stronger and more effective (Edmonson, Roberto, & Tucker 2002).
Higgins, Grossman, and Cheng’s (2007) “Managing Schools for High Performance” case study highlights how Former Area Instruction Officer Olga La Luz skillfully led a learning organization while aligning a large, urban school district’s vision to strategies, structures, and supports for schools in differentiated ways based on each school’s context and the intentionality of building relationships. Olga La Luz let principals know that she did not have all the answers. Many principals appreciated her for “walking the talk” and being clear about enacting a coherent vision to action. Ways that she provided support for school sites included her team spending 150 hours in a school reorganizing curriculum to align with state standards, hands-on support, one-on-one coaching, sitting down with school teams to look at student work, and leading “data to action” meetings. Olga La Luz was an exemplar of intrapreneurial leadership as she worked with school leaders and teams to pioneer a new system of support and interventions for an entrenched, bureaucratic system.

In learning organizations, technical and adaptive leadership challenges can often be referred to in a binary or “either-or” way; however, most of the time, these situations involve both technical and adaptive elements. Table 3, originally titled “Distinguishing Technical Problems and Adaptive Challenges” by Heifetz and Linsky (1997), clearly captures the elements of technical and adaptive challenges encountered in school systems in terms of our problem, solution, and our locus of work. Systems-level leaders must develop ways of thinking, being, and doing, through a blend of both technical and adaptive strategies, coupled with the tethering of clarity and learning.
Table 3

*Heifetz and Linsky’s “Technical AND Adaptive Leadership”*

<table>
<thead>
<tr>
<th>Kind of Challenge</th>
<th>Problem Definition</th>
<th>Solution</th>
<th>Locus of Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical</td>
<td>Clear</td>
<td>Clear</td>
<td>Authority</td>
</tr>
<tr>
<td>Technical &amp; Adaptive</td>
<td>Clear</td>
<td>Requires Learning</td>
<td>Authority &amp; Stakeholders</td>
</tr>
<tr>
<td>Adaptive</td>
<td>Requires Learning</td>
<td>Requires Learning</td>
<td>Stakeholders</td>
</tr>
</tbody>
</table>

The reason why it is highly recommended by experts to approach learning and change in a technical and adaptive way is because traditional, urban school systems tend to approach situations in technical ways. Likewise, in a school system’s central office and in local and state bureaucracy, one often encounters the answer of “Because we’ve always done it that way,” when asked, “Why are we doing it this way?” It points to a stuck, fixed mindset instead of an open, growth mindset. The next shift in terms of driving change in organizations would be to build leaders who are savvy at both the technical and adaptive pieces. As Chancellor of New York Department of Education Richard Carranza once said, “We need to focus on school change, not just school improvement” (communication, 2014).

What can happen when a school system is not a learning organization? District and school leaders, who do not create a learning climate where all can grow, may continue to replicate the status quo of schools being insular containers in the business of adults and students doing the same things repeatedly. Through personal study and practice, I’ve learned that to be an effective systems-level leader, one must create and build an environment where the capacity of adults
and student learning will be increased within a community of life-long learners. Most recently, I’ve had the chance to lead Superintendent and Chancellor teams to dig deep into learning and leading through Harvard’s Public Education Leadership Program; through the use of strategies, tools, teaming, and learning, I’ve witnessed the strengthening of coherent systems and structures that transform both the culture and performance of an organization.

As cited by Shane Safir (2017) in “The Listening Leader,” the “Six Circle Model” was developed and refined by a number of people including Margaret Wheatley, Tim Dalmau, and Steve Zuieback. The “Six Circle Model” shows how learning organizations can work together to build meaning and coherence. Figure 8 displays how the elements of structure, pattern, and process combine to form “The Way We Do Things.” In addition, the areas of information, connections, and identity work together to derive “How We Make Meaning.” It is a whole systems approach to working with change and organizational development.

**Figure 8**

*The Six Circle Model*
Shane Safir’s (2017) adapted version of the National Equity Project’s “Seven Circle Model” uses the “Six Circle Model,” and includes the dynamic of systemic oppression. The model in Figure 9 acknowledges that building towards coherent interactions and functions across departments involves “Above the Green Line” elements, which include structures, patterns, and processes. It also includes areas “Below the Green Line,” which dig into the less obvious and more implicit interactions of relationships, identity, and information. Furthermore, as school systems, such as SUSD, strive toward promoting student-focused, equity mindset approaches towards increasing outcomes for students, one cannot dismiss the knowledge that school systems are situated in environments of oppression, including structural racism, structural inequity, and unconscious bias; interactions amongst colleagues and meeting structures may also be touched by those dynamics.

**Figure 9**

*National Reform for Equity’s “Seven Circle Model”*  
*Adapted by Shane Safir*
In summary, the following three critical elements from the “Seven Circle Model” are used to analyze the strategic project as it relates to building coherence and collaboration as a learning organization:

1. “Above the Green Line” – The Way We Do Things
2. “Below the Green Line” – How we Make Meaning
3. Systemic Oppression

In working towards a whole child approach, it was exhilarating to discover a framework that takes into consideration a whole systems approach. Hence, the name of the strategic project took on a “Whole Child - Whole Schools - Whole Systems” approach.

**Review of Knowledge and Action Insights**

The bodies of literature on bridging fractured departments, building emergent collaborative teams, and the whole child systems approach, are intertwined. Furthermore, as pointed out by Former Superintendent Vicki Phillips, “Leadership can be nurtured through professional development - but not professional development as it is frequently done. It takes a more advanced kind of professional development - the kind that involves educators working together” (Duggan and Holmes, 2000, p. 13).

As we move into our Theory of Action, Strategic Plan Description, and Analysis of the goal to build and bridge multiple central office departments, we will keep the following in mind: “Public managers become strategists rather than technicians. They look out to the value of what they are producing as well as down to the efficacy and proprietary of their means. They engage the politics surrounding their organizations to help define public value as well as engineer
how their organizations operate. They anticipate a world of political conflict and changing technologies that require them to reengineer their organization often instead of expecting a stable harmony that allows them to perfect their current operations” (Moore, 1995, p. 20).

School systems researcher and professor David Cohen once told me, “Reforms are always deeply flawed because they work on the current and imaginable (what we cannot yet see realized), so some forms of the problem are always carried into the solution” (personal communication, 2018). How might school systems and how might we, as leaders, operate in ways that offer reflection and self-correction? In an environment that is often grounded and immune to change, how might we act adaptively by looking at the problem differently and designing solutions for these changing times with increased effectiveness?

David Tyack and Larry Cuban (1995) describe reform and change in school systems as happening at a “glacial pace.” Taking into consideration the limited timeframe of the strategic project, the Review of Knowledge for Action equipped me with the necessary armor of research-based theories and strategies to delve into the mechanisms of leading a fragmented school system while aiming to deepen authentic change and equitable outcomes for organizations.
**Theory of Action**

**If I...**

1. Build, articulate, and clarify structures and salient resources based on the whole child approach
   a. Clarify vocabulary, language, vision and philosophy
   b. Explicitly identify ways to focus the whole child, which integrates academics, social-emotional learning, and community supports in a systemic way

2. Bridge and create collaborative structures for Educational Services, Support Services, and Community Relations with coherence in mind
   a. Establish and develop the structure of Educational Services and Support Services meeting and working in a collaborative way
   b. Identify strengths, needs, and align resources, strategies, and supports

3. Act as a strategic partner and invest in building the capacity of the Educational Services and Support Services to become stronger equity-based, systems-level thinkers
   a. Offer research, evidence-based strategies and tools
   b. Provide strategies that increase organizational coordination and capacity building and provide opportunities for practical application

**Then...**

SUSD will have more clarity on the roles, processes, and framework on proactive and responsive systems of supports, and Educational Services and Support Services will have stronger cross-department interactions

**So that...**

SUSD can fulfill its mission to lift all youth out of poverty and scarcity by providing an educational experience that builds the whole child.
Description of the Strategic Project

The Whole Child Bridge Strategic Project:
What conditions would best position school systems to build emergent, cross-functional collaboration and increased coherence through a “Whole Child - Whole Schools- Whole Systems” approach?

Taking on a “LISTEN - LEARN- ACTION” Approach

Based on Jentz and Wofford’s (2012) leadership advice to “hit the ground learning,” I created a “LISTEN - LEARN - ACTION” approach. It was important to learn how Stockton Unified School District functioned by listening and learning through the lens of many different stakeholders (e.g., students, office staff, teachers, site administrators, central office administrators, board members, and community partners) before utilizing information gained by stakeholders to inform leadership decisions.

In terms of landing on and leading a strategic project that would be timely, relevant, and essential to the organization, I listened and learned through dozens of intentional learning conversations and interviews with a multitude of stakeholders. In an effort to be consistent with SUSD’s vision of “doing with and not to” the community, each learning conversation and interview included the questions: “What is the key problem of practice?” and “What is the one highest leverage ‘Small Act, Big Change’ I could contribute to SUSD?” I examined knowledge and information gained through the lens of Mark Moore’s (1995) “Strategic Triangle: Creating Public Value Framework,” which states: “A strategy and initiative for public sector organization must meet three broad tests” (p.20). An initiative should have public value, meaning that it is aimed at creating something substantively valuable. It should also be legitimate and politically
sustainable, meaning that it addresses the appropriate **authorizing environment**. Lastly, it must be operationally and administratively feasible; in other words, there must be **operational capacity**. To ensure that the strategic project would be positioned for traction and transformative change, I sought to look at factors that would act as levers in these three categories.

Upon my entry to Stockton Unified School District as a Harvard Leadership Doctoral Fellow, based on my nearly two decades of systems-level experience in urban, public school systems through a range of roles (e.g. Director of Principal Leadership, School Principal, Instructional Reform Facilitator, Classroom Teacher and Substitute Teacher), I was assigned to work closely with the Assistant Superintendent of Education Services, who functioned as the “Superintendent’s Number 2” or “second-in-command.” In addition, I received on-going guidance, support, feedback, and mentorship by Superintendent Deasy.

**Authorizing Environment**: The superintendent created the environment for me to have increased systems-leadership level access and the authority to lead. Superintendent Deasy invited me to show up and weigh in on school system decisions during all the Executive Cabinet meetings, which served to be highly instrumental in quickly learning more about the organizational context and systems strategies. Also, the superintendent’s act of publicly introducing me early on during a school board meeting as well as at the Extended Cabinet meetings positioned me well for leading this strategic project. What is more, with the Assistant Superintendent of Ed. Services welcoming me to the Educational Services team on day one with the announcement that I would take on a role similar to a “Chief of Staff for Ed. Services,” I quickly engaged in opportunities to provide high-level strategy. I was also invited to lead “large buckets of work”
focused on teaching and learning. The Executive Cabinet leaders in SUSD created the authorizing environment for me to be included; as a result, I was expeditiously integrated into systems-level work within the organization and cross-sector work in the community. According to Moore’s “Strategic Triangle” (1995), for any organizational strategy to be successfully adapted in the public sector, key leaders contribute to the building of public value.

Public Value: During my introduction to the school system, I was tasked with creating and co-facilitating the professional learning for the Educational Services Leadership Team Meetings. While I co-led the Overall Curriculum Implementation team, I started to wonder how we were working across systems with departments to serve the whole child, which includes the integration of academic, social-emotional, mental, physical, spiritual, and cultural aspects of our students. Communication between Ed. Services and Support Services had become fractured years ago before Dr. John Deasy became Superintendent of SUSD. During initial learning conversations, colleagues and community members began to share in depth about SUSD’s organizational history. A veteran SUSD colleague took the initiative to type up a document which elaborated on the high level of past leadership churn. In addition, the candid narratives of ‘Stocktonian’ colleagues painted a vivid landscape of past tensions.

Input from stakeholders across the school system affirmed that it would be timely and valuable for me to take on a role focused on a way to bridge and move these siloed departments towards the alignment of Ed. Services and Support Services. Community Relations was also included after the initial launch of the strategic project in order to strengthen a “Whole Child - Whole Schools - Whole Systems” approach. SUSD central office colleagues expressed an interest in
building collective efficacy and working together to provide professional development focused on the intersection of academics, social-emotional learning, wellness, families, and communities.

**Operational Capacity:** Through the learning conversations and interviews, one of the most significant insights was that the communication infrastructure between Ed. Services and Support Services was severely fractured over two years ago. In addition to the leadership churn of nine superintendents within the past 10 years, I also learned that for the past decade, Educational Services never had a leader who would stay in the position for more than two years. Through interviews and past agenda artifacts, I discovered that previous meetings were structured as whip-around updates from the various departments; they did not often include any heads-together, collaborative types of activities.

Structurally, members from across departments voiced that they would be interested in increased collaborative structures. The need to feel included and be seen as a higher priority was also a theme that was expressed by a number of Support Service colleagues. The Interim-Assistant of Support Services said that there were many “consummate professionals,” each of whom were knowledgeable and skilled in their respective programs and services; this key leader saw the inherited, siloed infrastructure as an opportunity to learn more about each other’s roles so that they could be better aligned (verbal communication, September 2019).

Also related to operational capacity, I was able to reserve a space for meetings, and we had access to communication technology such as Outlook and Google available to foster increased structures of collaboration; although with two curriculum initiatives roll-out as the main professional development priority, we
would have to use any meeting times and structures nimbly and efficiently. Months before the start of this school year, Ed. Services had reorganized their department. The newly hired Directors were broadly viewed as competent by site colleagues across systems. Since many of the newly hired senior leaders were recruited from other districts, they faced the sharp learning curve of learning SUSD’s organizational context as quickly as possible. The Interim-Assistant Superintendent of Support Services was also new in her role; learning the various programs, roles, and functions within and across each division within Support Services was also one of her initial tasks. Attending and contributing to the Executive Cabinet meetings, Regional Directors meetings, and across sector community meetings also remained a priority of mine so that I could continue to build on situational awareness and increase coherent alignment to the district’s vision and mission.

As I took on leadership actions for systems change, it is noteworthy to highlight that what started out as essential factors that enabled this project continued to be just as valuable throughout the whole project. Table 4 provides a summary of the contextual levers at the commencement of the Whole Child Bridge strategic project.

Table 4

Factors that Enable the Strategic Project

<table>
<thead>
<tr>
<th>Authorizing Environment</th>
<th>● Open and publicly verbal support of the Superintendent and Executive Cabinet leaders’ acknowledgment of the strategic project</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>● My role positioned to work closely with key leaders across departments</td>
</tr>
<tr>
<td></td>
<td>● Interest from individuals across departments to meet on a consistent basis to plan together and desire to increase face-to-face time</td>
</tr>
</tbody>
</table>
Public Value

- Based on surveys and learning conversations, Superintendent, Executive Cabinet, Directors of Educational Services, and Directors of Support Services view the strategic project as valuable
- Members of Educational Services and Support Services have mentioned they would like roles clarified and communication processes to be built for increased interaction across departments

Operational Capacity

- Facilities available and room reservations made for meetings
- Technological ability to send structured calendar invites and both Outlook and Google accounts with shared folders capabilities
- Biweekly meetings set with Superintendent, weekly meetings set with Assistant Superintendent of Educational Services, weekly meetings set with Interim Assistant Superintendent of Support Services, invitation to attend weekly Regional Directors meeting, and calendared invites to attend Executive Cabinet meetings (4x’s per week)

Goals for the Strategic Project

1. Increased cross-team fluid functioning between Educational Services and Student Support Services
2. Increased clarity of communication regarding roles and structures set for how the two departments work together
3. Deepened collaboration and increased quality of relationships and trust through workstreams
4. Increased knowledge of research-based whole child frameworks and plan to share and implement with schools through short-term and long-term professional development

In planning for the strategic project, Table 5 shows the milestones and benchmarks I designed in order to build coherence with colleagues in the articulation of project plans and goals.
### Table 5

**Strategic Project Continuum**

<table>
<thead>
<tr>
<th>Outputs/Outcomes</th>
<th>By November 1</th>
<th>By January 15</th>
<th>By April 30</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meeting Structures</strong></td>
<td>Consistent meeting structure between Educational Services and Support Services established and calendared (Create agenda and facilitate meeting)</td>
<td>Consistent and deepening of meeting structures between Educational Services and Support Services (Co-create agenda and other colleague facilitates meeting)</td>
<td>Increased cross-team fluid functioning between Educational Services and Support Services (Invite other colleague to co-create agenda and facilitate meetings)</td>
</tr>
<tr>
<td><strong>Clarity of Roles and Organizational Function</strong></td>
<td>Mapping of roles in each department</td>
<td>Clearer understanding of roles and how departments are organized</td>
<td>Structure for increased clarity of communication regarding roles and structures set for how the departments work together</td>
</tr>
<tr>
<td><strong>Collaboration and Relationships</strong></td>
<td>Identified structures of collaboration</td>
<td>Increased quantity of collaboration time and engagement in activity focused on building relational trust through workstreams</td>
<td>Deepened collaboration and increased quality of relationships and trust through smaller workgroup</td>
</tr>
<tr>
<td><strong>Whole Child Knowledge and Application to Professional Learning for Sites</strong></td>
<td>Research on integration of best whole child-related frameworks connecting theory and practice and incorporating SUSD context</td>
<td>Clarifying and co-creation of grounding visuals, resources and documents and short-term professional learning for school administrators</td>
<td>Co-created long-term plan for whole child approach professional learning to support sites</td>
</tr>
</tbody>
</table>
Description and Timeline

**August:** I was responsible for creating, prototyping, developing, and leading the "**Whole Child Bridge**"—an emergent system for increased cross-departmental fluid function between **Educational Services** (e.g., school supervisors, curriculum and instruction, equity, dual language, state and federal, career and technical education, etc.), **Support Services** (e.g., special education, health, counseling, child welfare, enrollment, after school programs, etc.), and **Community Relations** (e.g., family engagement and community partnerships). These central office departments were working on many different initiatives; they did not initially have a formalized structure to meet and collaborate.

I also worked closely with the Assistant Superintendents and teams of Ed. Services and Support Services Directors to deepen the collaboration between departments and focused on building relational trust. The Regional Directors who supervised schools also added valuable input and strategies regarding alignment with the local school context. Participating as a strategic partner during Executive Cabinet meetings was also a way to stay informed about cross-departmental happenings and further ensure the alignment across systems.

**September:** I designed and implemented the Whole Child Bridge monthly meeting structure, which provided a learning space between Educational Services, Community Relations, and Support Services. Team identity was one of the first goals; therefore, I created the name “**The Whole Child Bridge,**” a kinesthetic visual of our hands aligning together, and a logo, which I initially found on an open-source website. Midway through the project, I enlisted Community Relations to support the design of the logo in Figure 10. Members from across departments
had the opportunity to bridge relationships through both personal and professional sharing. The function of these meetings was clarified during the project to explain that since there were over 30 central office leaders who attended the meetings, the purpose would be to learn more about research, best practices, and clarity around the whole child approach.

Figure 10

*The Creation and Implementation of the Whole Child Bridge Logo*

<table>
<thead>
<tr>
<th>Utilized on the agendas and meeting slides during initial Whole Child Bridge meetings</th>
<th>Co-created by the Whole Child Bridge team with the help of the Community Relations team and voted upon for use midway through the project</th>
</tr>
</thead>
</table>

I also introduced Bryk’s (2010) “Organizing for School Improvement” framework to the Executive Cabinet, Regional Directors, Ed. Services, and Support Services. I led an activity based on Bryk’s article with the Regional Directors that was then used during the All Administrators Monthly Meeting; as a result, school administrators were able to give feedback on their professional development needs. I then coded all of the input and presented the findings, which was presented at the All Administrators Monthly Meeting PD in October 2019.

**October:** As a growing learning organization, I initiated and coordinated a learning visit to San Francisco Unified School District so the group could connect with “across school system colleagues” who had systems and structures in place
for collaboration. I also used the “Meeting Wise” protocols to start a collaboration structure for Educational Services Executive Assistants. I planned and supported the facilitation of all of the Education Services Leadership Team meetings. I contributed to the initial work of Stockton’s Children’s Cabinet, which was a partnership between the school system, county, and mayor’s team.

**November:** I designed and provided an opportunity for the Whole Child Bridge colleagues to hear from Superintendent Deasy about his work and collaboration with the Aspen Institute’s 2019 Report “From a Nation at Risk to a Nation of Hope.” Soon after, I invited colleagues to share their insights from the San Francisco learning visit, and it became clear that we would need to start a workstream group that would focus on coming up with some short term goals as well as a longer year-long plan. In addition to co-designing the Education Services Leadership Team biweekly meetings, I worked with the Assistant Superintendent of Ed. Services and added a new formal professional learning meeting structure called the “All Education Services Monthly Meetings.” I also created the collaborative meeting agenda templates for our Executive Educational Services leaders.

**December:** I spearheaded the creation and formation of the “School Culture Climate Leadership Team (SCCLT)” workstream group. The SCCLT focused on planning how central office departments could best help sites strengthen their school-based culture leadership teams. Instead of adding more meetings to our colleagues’ schedules, we repurposed the “Department of Justice” biweekly meeting time, and shifted the focus to proactive planning, instead of reactive actions. I led all of the operations and communications for collecting the photos, roles, bullet points, and contact information for 280 colleagues from Educational
Services, Community Relations, and Support Services and created a visual “Whole Child Bridge” Look Book Directory (See Appendix B) as an effort to build and promote a culture of service to school sites. I came up with the idea of having a one-day leadership retreat in January with Ed. Services’ Assistant Superintendent and Executive Directors in order to build coherence and alignment within our department.

**January:** In addition, I co-created the Integrated Instructional Framework, illustrated in Figure 11, with input from Ed. Services Executive Leadership Team, to further emphasize the importance of aligning our students’ academic learning with their social-emotional, mental, and physical well-being through the Multi-Tiered, Multi-Domain System of Supports. The co-creational aspect was intentional, as it was a way to build continued partnerships across departments. I also ensured that the framework factored in current research and evidence-based strategies. I collaborated with leaders across departments to launch the cross-departmental Look Book visual directory. On January 17, 2020, I worked with Ed. Services Assistant Superintendent and Executive Directors during a leadership retreat to focus on long-term planning in order to build coherence.

**February:** Lastly, I must acknowledge that Educational Services, Support Services and Community Relations exist within a larger system, and our students’ success is directly affected and connected to their lives outside of the classroom. Therefore, I proactively learned about ways to bridge SUSD’s work with community-based organizations and collective impact opportunities within Stockton. I acted as a strategic partner by offering research, evidence-based resources and processes that increased organizational coordination and capacity building. On February 20, 2020, key leaders from Ed. Services and Support
Services co-created and provided professional learning inclusive of Multi-Tiered Systems of Support and the development of CARE and Student Assistance Program teams.

Figure 11

Integrated Instructional Framework Visuals

<table>
<thead>
<tr>
<th>Teaching and Learning</th>
<th>Effective Leadership</th>
<th>Equity Mindset</th>
<th>Student Focused</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-January 2020</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>During initial Ed. Services Executive Retreat meetings examined student data, used through a Decision-Making Model and district priorities to identify these essential components.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Late January 2020      |                      |                |                 |
| During a follow-up Ed. Services Executive Retreat meeting, I presented a draft visual that keeps students at the center of our work (why) through an equity lens (how) as we work towards effective leadership and teaching and learning (what). |

| February 2020          |                      |                |                 |
| After input from the whole Ed. Services team and Support Services colleagues, with the input of the Assistant Superintendent of Ed. Services following an equity-based professional learning with AVID colleagues, we adjusted our visual. |
Evidence and Data Collected

Data was collected on August 1, 2019 to February 20, 2020, from the following:

1. School Supervisors (i.e. Regional Directors) Weekly Meeting
2. All Administrators Leadership Monthly Meeting
3. Educational Services Leadership Team Meeting (ESLT)
4. All Educational Services Monthly Meeting
5. Whole Child Bridge Meeting (Monthly)
6. School Culture Climate Leadership Team Meeting (Biweekly)
7. Educational Services Executive Assistants Weekly Meeting
8. 101 Audio Reflections

For the structures named above, I created, designed or co-designed, garnered input, and initiated feedback loops with key stakeholders. For example, I provided input into the design of the School Supervisors Weekly Meeting and All Administrators Leadership Monthly Meeting. Along with the Assistant Superintendent of Ed. Services, I co-designed the Educational Services Leadership Team Meeting (ESLT) and the All Educational Services Monthly Meeting. I took the lead in creating and designing these structures, and intentionally included key stakeholders throughout the following processes: Whole Child Bridge Meeting monthly, School Culture Climate Leadership Team Meeting, and the Educational Services Executive Assistants Weekly Meeting. I used the 101 Audio Reflections as a tool for leadership reflection.

Tables 6-8 highlight the quantitative results from the initial survey to the final survey. Table 9 includes qualitative evidence of impact. Overall, within a span of six months, SUSD system-level colleagues from Ed. Services and Support Services increased the “level of collaboration, communication, and alignment” by 200%, moving from 3.1 to 6.2 on a ten-point scale.
Table 6

*Initial Survey (August 2019)*

<table>
<thead>
<tr>
<th>Services</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational Services</td>
<td>3.3</td>
</tr>
<tr>
<td>Support Services</td>
<td>2.8</td>
</tr>
</tbody>
</table>

On a scale of 1-10, what has been the level of collaboration, communication, and alignment between Ed. Services and Support Services?

1 = very weak / very low

10 = very strong / very high

Table 7

*Final Survey (February 2020)*

<table>
<thead>
<tr>
<th>Services</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational Services</td>
<td>6.4</td>
</tr>
<tr>
<td>Support Services</td>
<td>6.6</td>
</tr>
</tbody>
</table>

On a scale of 1-10, what has been the level of collaboration, communication, and alignment between Ed. Services and Support Services?

1 = very weak / very low

10 = very strong / very high

Table 8

*Initial and Final Survey Analysis:*

<table>
<thead>
<tr>
<th>Results and Trends</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Index (based on the ten-point scale)</td>
<td>A positive increase of 200% in the level of collaboration, coordination, and alignment</td>
</tr>
<tr>
<td>Initial Survey results – average 3.1</td>
<td></td>
</tr>
<tr>
<td>Final Survey results – average 6.2</td>
<td></td>
</tr>
<tr>
<td>Duration of Time</td>
<td>6 months</td>
</tr>
<tr>
<td></td>
<td>From September 2019 to February 2020</td>
</tr>
</tbody>
</table>
Table 9

Qualitative Results from the Final Survey (February 2020):

<table>
<thead>
<tr>
<th>How have we moved the work of building and bridging the Whole Child Bridge? What has been helpful and useful?</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following quotes are representative of the trends and patterns:</td>
</tr>
<tr>
<td>· “Convening. Conversations about current state.”</td>
</tr>
<tr>
<td>· “Brought Student Support Services and Ed. Services together.”</td>
</tr>
<tr>
<td>· “Allows time for discussion regarding bridging initiatives throughout both departments such as Positive Behavior Intervention Systems, Restorative Practices and Tier I supports.”</td>
</tr>
<tr>
<td>· “The student focus: making a positive impact.”</td>
</tr>
<tr>
<td>· “There is now an established meeting that allows Ed. Services and Support Services discussion on how we can work together to provide educational opportunities that address social-emotional as well as teaching and learning.”</td>
</tr>
<tr>
<td>· “Having crucial conversations regarding the data outcomes and planning next steps. Planning the next steps has been exciting. Knowing we will develop supports and improved services to better meet the needs of our students.”</td>
</tr>
</tbody>
</table>

February 20, 2020 - All Administrators Meeting (MTSS / School Culture)

The Support Services Team had not had an opportunity to provide professional learning during the All Administrators Meeting for the entire school year. During the month of January, a smaller workgroup of the School Culture Climate Leadership Team co-created the content and learning activities for the February 20th session. The planning of the “MTSS / School Culture” session was the first cross-departmental collaboration of the year in terms of professional learning offerings. Figure 12 and Figure 13 indicate that overall, the majority of the 70 site administrative survey participants found the professional learning “helpful” or “very helpful.” On average, site administrators rated the professional
development 4.02 out of 5. The visual data also provided an opportunity to examine how school sites viewed their own leadership, systems, and support offered by SUSD central office. Appendix C-E includes additional results from survey questions. 87% of school administrators indicated that they felt confident with their MTSS/School Culture. 13% of site administrators were neutral or disagreed that they had systems in place for MTSS/School Culture. One of the final questions also asked site administrators to identify which schools and administrators should be celebrated for promising practices in school culture work, and over ten different sites and/or administrators were identified.

**Figure 12**

*Number of Participants*

February 2020 All Administrators Meeting on Support Services PD

“What is your role?”
The Equity Question

I created, designed, analyzed, and provided feedback to colleagues regarding the professional learning experience of principals, assistant principals, and central office administrators at each of the All Administrators Meetings. After co-leading the Overall Curriculum Implementation reflection part of the meeting, I had one-to-one meetings with the individual members of the Ed. Services Executive Leadership Team. During those individual meetings, I explained why we should explicitly add a question in the survey to see if site participants felt that central office colleagues were leading professional learning with an equity
mindset. My rationale was that by adding a question about equity, we would be modeling for site administrators that they, too, should ground their professional learning activities in equity. Also, by asking the question about equity, we would gain more clarity through the responses about where the sites’ understanding was regarding the concept of equity. Figure 14 indicates that administrators overall responded that they believed that the professional learning was grounded in equity.

**Figure 14**

*Feedback from Administrators from Feb. 2020 Regarding Equity*

"*Please rate this statement:*

*The professional learning today was grounded in equity.*"

![Bar chart showing feedback from administrators regarding equity](image)

Data from Educational Services Leadership Team Meeting on Feb. 18, 2020

I co-designed and implemented the agenda with the main objective to provide a space for ESLT members to reflect on their past Objective and Key Results (OKRs) outcomes, highlights, and next steps. At the meeting, I also designed a time, process, and shared Google folder so colleagues could access all OKRs transparently. Figure 15 shows that 60% of ESLT colleagues “strongly agreed” and 40% “agreed” with the statement: “Our time together helps us grow stronger in collective efficacy.”
Figure 15

Feedback from Ed. Service Leadership Team

“Our time together helps us grow stronger in collective efficacy.”

Data from Whole Child Bridge Meeting on December 10, 2019

I created ways to capture feedback for nearly all of the meetings designed. On December 10, 2019, I administered a quick feedback survey link to assess the collective group. Figure 16 shows that 56% Whole Child Bridge colleagues “strongly agreed,” 31% “agreed,” and 13% felt neutral regarding the statement: “Our time together helps us grow stronger in collective efficacy.” Nearly all participants indicated that they gained more clarity of roles through the Whole Child Bridge structure (See Figure 17).

Figure 16

Feedback from Whole Child Bridge Survey 12/10/19

“Our time together helps us grow stronger in collective efficacy.”
Data from the 101 Audio Reflections

Audio reflections were captured to highlight salient events and leadership actions. The audio reflections were also matched against the calendar invites to examine the strategic project’s use of time and to reflect on the return of investment through the activities. Appendix F summarizes the strategic project work, which was made visible through the audio reflections. The information gained by the audio reflections infers a correlation to the theory of action and indicates that there were 11 new structures created. In terms of building coherence, the information gained by the audio reflections indicates that a number of meeting types (e.g., individual, small group, whole group) with key stakeholders across the organization for multiple points of entry and interaction was prevalent as a result of the strategic project.
Meeting Agendas

Appendix G-I provides samples of meeting agendas that I designed and operationalized. All meeting agendas included the “Meeting Wise” checklist elements in Appendix J: purpose, outcomes, roles (e.g., facilitator, notetaker, and time-keeper), norms, and time allocations (Boudett & City, 2014). Meetings were also comprised of the following routines and activities: welcome, framing, review of previous feedback, learning activities, input, decision-making, next steps, and closing feedback. Upon reviewing all of the meeting agendas, the following themes emerged: building learning organizations, collaborative structures, and coherence. In addition, when building learning organizations, three components are essential: 1) intentional reflection times, 2) engaging in one-on-one, small group, and large group conversations, and 3) learning through networks.

Analysis of Data

Shane Safir’s (2017) adapted version of the National Equity Project’s “Seven Circle Model” was used to analyze the data and the WHY of the strategic project. It was a useful tool to use because it enfolded the “Six Circle Model” elements “Above the Green Line,” which includes structures, patterns, and process as well as areas “Below the Green Line,” which dig into the less obvious and more implicit interactions of relationships, identity, and information. The “Seven Circle Model” also explicitly identifies systems of oppression and asks how we might further address those related issues. As we focused on ways to promote student-focused, equity mindset approaches towards increasing outcomes for students, the “Seven Circle Model” highlighted the need to think adaptively about limitations and
barriers to overcome. This framework served to bring awareness on how our school systems and interactions are situated in environments of oppression, including structural racism, structural inequity, and unconscious bias. In summary, the three critical elements from the “Seven Circle Model” were used to analyze the strategic project:

1. “Above the Green Line” – The Way We Do Things
2. “Below the Green Line” – How We Make Meaning
3. Systemic Oppression

Initial and Final Survey Data

Through the strategic project, colleagues from both Ed. Services and Support Services indicated a positive increase of 200% - moving from 3.1 to 6.2 on a ten-point scale of 1 being the lowest and 10 being the highest - in answering the question about the level of collaboration, coordination, and alignment across departments. What’s behind that response? The majority of the responses were categorized “Below the Green Line”; colleagues noted that it was of great value to finally gather at the table together, not only to share updates, but to exercise healthy ways to have “crucial conversations,” as one individual dubbed it.

An Ed. Services colleague responded that she felt like before the Whole Child Bridge structures existed, there were no formal ways that Ed. Services and Support Services could share their why. This educational leader aimed to co-create and bring increased alignment across both school-day and after-school programs. This colleague also had the lowest score in the final survey; she provided a score of 3.5. When asked about the score, she explained, “A 3.5 is huge progress. You have to understand before the Whole Child Bridge work we were at a negative
number; we weren’t even at zero.” She stated that the Whole Child Bridge and the intentionality of bringing people across departments was the first time in her 13 years in SUSD that she felt inspired and “empowered” to do the work. It was the first time that she had been “seen and valuable.” “Personally and professionally, it has empowered me. I’m part of a team that sees me. [Name] has a voice - I’m part of a real goal. Very valuable - the value in myself has grown” (Ed. Services colleague, communication, 2020).

Newly created meeting structures provided an environment for colleagues to learn more about an equity-based vision of leadership. Through the emergent structure of the All Educational Services Monthly Meeting that I co-designed and implemented with the Assistant Superintendent, we included strategies such as modelling the power of courageous vulnerability by providing a “360 Leadership Feedback” opportunity for over 40 Ed. Services leaders. An Ed. Services colleague shared, “I’ve been able to see the Assistant Superintendent not as a dictator, but leadership that is inclusive [with a] big heart for kids. We’re part of a team - and if you’re not, you need to rethink how to get there” (Ed. Services colleague, communication, 2020).

There is something very powerful about designing structures and processes, which is the “Above the Green Line” technical piece of leadership. Furthermore, when structures and processes are integrated to include deep reflection regarding identity and values, we can disrupt systems of oppression and unleash the power of central office colleagues to be seen and heard, in ways that mirror how we want to see students gain agency in their learning and lives.

What led to marked improvement? A Support Services colleague rated the level of collaboration, communication, and alignment between departments as a
“2” in September 2019, and later gave a score of an “8” in February 2020. “Sitting at the table has made a difference. Today was very productive and how to approach the classroom and integrate it [equity]. How to present professional development and what [name of our principal team representative] said, ‘We are part of a bigger picture’ [not just in siloed service areas]. [It] validated my philosophy that we don’t go and take over, we support. Combined Ed. Services and Student Support is the key” (Support Services leader, communication, 2020).

During a focused one-one-one follow-up conversation with this Support Services colleague in February 2020, she mentioned that the most effective strategy was the “party bus” 3-hour ride back from the San Francisco Learning Visit I had organized. When probed with more questions, the colleague responded that the ride with the 10 members not only gave an opportunity to debrief the systems and practices we learned about from the Bay Area school system, in terms of the coordination and effectiveness of across department professional learning, it provided increased access for the veteran Support Service members to meet with Ed. Services colleagues (half of whom were newly hired just 3.5 months prior).

As evidence of impact, the Support Service colleague said that due to the ride in the “party bus,” she was able to get to know the Ed. Services colleagues. Shortly after, she had built the relational trust needed to feel confident in reaching out whenever she needed to coordinate services with the Regional Directors in support of schools. “I had the chance to know them as a person… to see the people under the people. It was a pivotal moment, getting to know the other as a person and developing relationships.”

The “party bus” used for the October 2019 San Francisco Learning Visit was called that because it was essentially a shuttle that held up to 20 people, designed
in a way where everyone was forced to sit facing each other in an oval formation. Due to the design of the “party bus,” Ed. Services and Support Services colleagues spent 2.5 hours talking about personal and professional issues on the way to San Francisco. The return ride was over 3 hours due to traffic; we spent much time learning about past and current strategies and planning for future interactions. One illuminating discovery from the San Francisco Learning Visit was the idea of central office teams identifying the what and the how based on one focal area (e.g., restorative practices); in addition, in large, urban school systems, it can take five to 10 years to implement a district-wide initiative with excellence, fidelity and authenticity.

**Educational Services Executive Leadership Team Retreats**

The Educational Services Executive Leadership Team Retreat was a structure I created in response to the following question: “What is Ed. Services’ North Star?” Early December, during a series of professional learning which included instructional visits at school sites, many questions started to surface. These inquiries pointed to the lack of direction and guidance around clear instructional expectations. When none of the Ed. Services leaders were able to confidently answer the following question: “What are the key teaching and learning practices that Ed. Services aspires to see in the classroom?,” I spoke with the Assistant Superintendent and two Executive Directors of Ed. Services to initiate the planning of an Executive Leadership Team Retreat. We were unable to find a time in December; however, we landed on a date, which was January 17, 2020, and held the retreat at the Sierra Health Foundation conference facility in Sacramento County.
During the retreat, we examined data and grounding documents, such as the superintendent’s goals and priorities. The morning commenced powerfully as the Assistant Superintendent kicked off the meeting with a question, “What did you expect work in Stockton would be like, and how is your current experience different?” Members shared openly, deeply, and vulnerably with themes that touched upon racially oppressive interactions and fragmented systems. Our time of learning and planning intersected all areas of the “Seven Circle Model.” It was important to ground the work in the relational “Below the Green Line” dynamics as we focused on the “technical” elements of defining the North Star in an environment with many structural inequities. Since developing the “Below the Green Line” takes time in order to elicit to deeper meaning and interactions, we followed up by calendaring follow-up retreat dates for three additional sessions. Our time together produced grounding visuals that were aimed to build coherence.

**Grounding Visuals to Build Coherence**

I had shared with each Ed. Services Executive Leadership Team member that I desired to land on some visuals that would help Ed. Services point to a “North Star” and provide the “who we are,” “what we’re about,” and “why we do this work.” In addition, the Executive Director of School Supervision and I were very interested in creating strategic planning types of documents. The Assistant Superintendent’s view was that there should be “No false starts,” which meant that it was better to “Go Slow to Go Fast”; these themes resonated with my prior experience in systems-level work and change management. There was a tension in this work because there were so many urgent demands; however, reaching
sustainable results meant investing in the time needed to change the practices and behaviors of the individuals in the organization.

Each member of the Executive Leadership Team contributed to the creation of the visuals, which were introduced earlier in Figure 11. As we defined the essential elements of Ed. Services’ North Star, I expounded upon why it would be helpful to create a visual to be used within Ed. Services, then shared more broadly across central office and school sites. The visual would provide an additional opportunity to build “Below the Green Line” ways of understanding information with our Support Services colleagues. We also tapped into prior knowledge gained from past Aspen Institute “Zoom calls” and the Whole Child Bridge meetings, regarding using a racial and equity lens with any leadership action.

The Assistant Superintendent clarified that the “what” we’ve been working on within Ed. Services is “Teaching and Learning” and “Effective Leadership.” We all agreed about the importance of shifting classroom interactions to build student agency. In addition, we wanted to shift from the traditional focus of “classroom management” to “strong adult-student interactions that foster a positive school culture.” Taking these concepts into consideration, I visually put together and designed the frameworks from Figure 11 with the help of our graphic artist SUSD colleagues.

**Shifts to the visual:** After I designed the All Ed. Services Monthly Meeting to focus on the way our Advancement Via Individual Determination (AVID) program was integrating equity, the Assistant Superintendent demonstrated increased ownership by asking if I could make the graphic into a triangle so that it would look more like AVID’s Instructional Framework. It was a sound idea because that would increase coherence and understanding of many individuals
who were already familiar with AVID’s visual. In future meetings with Ed. Services, the Assistant Superintendent and I shared the grounding visual. I also utilized the grounding visual during School Culture Climate Leadership Team Meetings and with the larger Whole Child Bridge Team, which brought an increased understanding of the student-centered, equity mindset focus. I was intentional about collaborating with Support Services colleagues, whom their Assistant Superintendent dubbed as “consummate professionals” and “doers,” to help them see that we needed to also shift our thinking to be student-focused and bridge caring adult-student relationships that acknowledged implicit bias and structural inequities.

A pivotal moment occurred on February 5, 2020, when I was able to build coherence by the sharing of information and inclusion of a school site administrator to our formal collaborative meeting structure. I recruited a trusted site principal to join the smaller Whole Child Bridge workgroup focused on strengthening school culture & climate; this principal was able to recruit an additional site administrator to provide input and deepen coherence across the central office and school sites. Even though I didn’t have “permission” to show the grounding visual, I had co-created and fully designed it. I was confident that sharing the visual would be essential in building stronger coherence and supporting our Support Services to develop the “Below the Green Line” meaning-making needed to shift towards a more student-focused and equity lens approach.

Impact of the visual and elevating site-based voice: The principal’s practice-based perspective aligned perfectly with the visual; immediately after I showed and explained the tenets of the framework, including the aspect that all the work we do is in vain unless it’s done with a lens of building student agency
through an equity lens, the principal team member shared that “Adults need to care first [mindset], but we have too many teachers who are just here to read and write. Students need to be cared for by teachers and adults in the school. A problem of practice is that schools are experiencing a disconnect in the new curriculum - or perhaps a mixed message. At CORE walks, we’re told not to deviate, so when you’re incorporating equity-based strategies, AVID strategies, etc. it is viewed as not following or sticking to the script. So, schools can have more support with this; if we can show that it’s included in the curriculum integration, that would help” (communication, February 5, 2020).

During the same School Culture Climate Leadership Team meeting, I brought up the idea that I would like a way to integrate components of Positive Behavior Intervention Systems (PBIS) and restorative practices so that they would not be viewed as two siloed strategies. Regarding potential access to professional development, I posed a question and asked if teachers might start with community circles. The Executive Director invited the PBIS Director to share about the idea of incorporating “Second Step” social-emotional strategies. It was helpful and timely to have the principal’s voice in the room; this site administrator simultaneously offered the suggestion that “the message needs to come from Ed. Services and curriculum.” When asked what would work in terms of adding a curricular practice related to social-emotional development, the principal team member said with confidence, “We will need to start as a mandate and support with the first 30 min English Language Arts. Don’t say ‘add time.’ We need to say this [social emotional] is considered an E.L.A. component. [We need] the curriculum department’s support in the messaging” (Principal Colleague, communication, February 5, 2020).
An Analysis of Barriers and Challenges

Deep, authentic change often happens at a glacial place in school systems:
During a one-on-one conversation in October 2019, the Assistant Superintendent of Ed. Services shared that at the end of this six-month project, there would be no way that we could reach cross-department alignment. This was consistent with the Review of Knowledge for Action, which also pointed to alignment as a multi-year effort. Each department needed time to build their own teams first and understand more about the context of the organization. I respected the numerous honest, transparent conversations with SUSD colleagues regarding what might be best for the community. Taking into account Superintendent Deasy’s input, I readjusted the timeline and outcomes. I also refocused more activities to include the Assistant Superintendent’s desire to center our work on relationship building and gaining increased clarity of roles within and across departments.

Originally, I had wanted to leave a legacy of a multi-year strategic plan for SUSD to use. However, during our Ed. Services Executive Retreats consisting of four key members, the Assistant Superintendent cautioned us not to rush into “false starts.” We were urged to slow down and focus on “Below the Green Line” meaning-making to gain an increased clarity of understanding shifts towards a student-focused, equity lens in our work before drafting a strategic plan. It was important to the Assistant Superintendent that we land on our pillars of focus prior to moving into establishing goal setting and a plan for implementation. We already had a “Year 1, 2, and 3 Curriculum Implementation Plan” in place, and the overall consensus of the team was not to rush into solutions with our whole child-focused planning, but rather take the time to delve into root cause analysis. Learning more about the context would lead to deeper solutions and strategies.
The Assistant Superintendent also prioritized building the team and collective capacity within Ed. Services; for example, I played a role in strategy through the Overall Curriculum Implementation Team and invested time into those formal meeting structures on a weekly basis.

The “October 16th San Francisco Learning Visit” I organized for SUSD colleagues also reinforced the concept that building coherence and aligning structures is more often a long-term, five- to ten-year type of initiative. According to Fullan and Quinn (2016), “One other crucial point about coherence is this: you never arrive once and for all, nor should you want to. There are always new developments so that you need to be plugged into innovations and the wider knowledge arena” (p. 2). Coherence building, especially in emergent, collaborative spaces, is an on-going process.

A paradoxical perspective: A number of situations and outcomes arose, which were both wins and losses at the same time. For example, one of the culminating activities of the project was leading colleagues to plan across department professional learning for the “February 20th All Administrators Leadership Meeting.” It was a success in the fact that the Executive Director of Ed. Services demonstrated ownership by creating a series of planning meetings between a small group of six key members across Ed. Services and Support Services. It was also a success, being that it was the first time since the start of new district leadership that Support Services was able to lead professional learning at an All Administrators Leadership Meeting. At the same time, it could be seen as a failure since the professional learning content presented still mirrored the siloed ways of presenting information, although there was cross-collaboration. During the meeting, Ed. Services colleagues focused on the importance of utilizing
coaching strategies; however, we lacked the increased communication channels needed to share this information with Support Services in a way that would integrate professional learning across departments more effectively.

What is authentic and what is artificial? In “Finding our Way: Leadership for an Uncertain Time,” Margaret Wheatley (2017) purports that “Within the artificial boundary lines and well-defended territories, people are self-organizing into real systems, reaching out to network with those who share similar beliefs or aspirations…. Many small systems are created within the artificial system of a district. It is these real systems that become clearly visible when we try to change the artificial ones. People often startle us with the ferocity with which they confront and impede our efforts. But it is these real systems we must work with if we want to effect change” (p. 104). Wheatley reminds us that everyone participating in a school district is a living being, who responds to the “Above the Green Line,” “Below the Green Line,” and systems of power and oppression they may experience in all areas of their lives.

The colleagues who had a genuine interest and investment in structures like the Ed. Services Leadership Team, Whole Child Bridge, and School Culture Climate Leadership Team experienced authentic engagement, identity, coherence building, and clarity of possible next steps in cross-fluid functioning. However, for some colleagues of the Whole Child Bridge, the boundary created could have been experienced as something inauthentic and forced. What was at the root of the inability to bring all key players to an authentic experience - one where each would look forward to connecting and collaborating with their cross-department colleagues? Broken relationships and a protective disposition to return to behaviors in ways that reinforced known patterns and silos.
The meeting structures fostered team and teaming; however, structures are “Above the Green Line” elements, and “Below the Green Line” work was needed to further restore unresolved tension and resentment amongst individual members in our organization. Even though there was an increase in collaboration and coherence within and across departments, upon listening to individual and group narratives, I would also hear themes of “this was done to me,” “we can’t do this because...” or “we have communication issues” sprinkled in from time to time. It was not uncommon to hear individuals painting a picture of themselves lacking the true power they could actually embody.

At certain points along the way, I offered to lead restorative practice-based activities in individual, small group, or whole group settings, but the colleagues’ response was usually one of inquiry versus action. It is no wonder that the Whole Child Bridge may not have been fully authentic to those members. The desire to find coordinated ways to support academic, social, and emotional development may have been a shared interest; however, due to the systems of power and oppression at play, the rational “Above the Green Line” (How We Work Together) may have been hindered by the relational “Below the Green Line” (How We Make Meaning). The lack of restorative practices and relational trust amongst individuals in the organization inadvertently affected the collective whole in its interactions.

In a system where the school board has passed resolutions focused on restorative justice, and where the district’s “Department of Justice (DOJ) Committee” meets on a regular basis to plan and implement systems-wide actions aimed at decreasing the racial disproportionality in discipline, there is not yet enough evidence to indicate that school board members nor central office
colleagues across departments would collectively be able to model effective systems of restorative practices; this is not to say that it is unviable, the main purpose of this statement is to highlight gaps and systemic growth edges. The school system has the resources to model solid restorative practices through individuals that work in the district-wide counseling department; however, this has not been activated amongst our adult colleagues. SUSD does not yet have a system in place for adult colleagues to practice “Tier 2” or “Tier 3” type of restorative practices. If the school board is divided and unable to model restorative practices, the organization may lose renewed hope and default back to the leadership churn. “Old ways die hard. Amid all the evidence that our world is radically changing, we retreat to what has worked in the past. These days, leaders respond to increasing uncertainty by defaulting to command and control” (Wheatley, 2007, p. 64).

**Size and participants affect collaboration:** The group size of the Whole Child Bridge was about three times larger in number than the smaller School Culture Climate Leadership Team, and that also made it more difficult to foster a collaborative environment. Also, for both meeting structures, I was in charge of sending the formalized calendar invites. However, for the School Culture Climate Leadership Team, I made a verbal announcement, at the November 2019 Whole Child Bridge meeting, that the smaller workgroup would be an opt-in team. Furthermore, I explained that individuals joining the smaller workgroup would be required to collaborate and engage in healthy conversations that would challenge each other constructively against the status quo. Therefore, the smaller workgroup had the conditions for being a more effective, collaborative space than the broader Whole Child Bridge structure.
Analysis Reflections: Sustainability, Predictions, and Insights

I anticipate that what will remain, sustain and grow will be what is authentically valued by both the individual and collective need. The post-strategic project month of March has been a way to test out what may remain and what will not. I predict that the smaller Whole Child Bridge workgroup, also known as the School Culture Climate Leadership Team, will continue. In fact, this was tested out during the month of March during the Coronavirus-19 (COVID-19) pandemic. After sending individual emails to the smaller workgroup, I let colleagues know that we would only switch to virtual “Zoom meetings” if team members responded that it would be valuable. The response was overwhelmingly positive, and the majority indicated that they would find it valuable to meet via Zoom conference calls. The team shared updates and offered support; it was also productive in “Below the Green Line” information sharing, which then became “Above the Green Line” suggestions for greater systems change initiatives to be shared at the All Administrators’ Conference Call later that week.

I predict that the inclusion of school site voice during School Culture Climate Leadership Team meetings will continue. Our principal representative recruited another principal who was highlighted from our February 20, 2020 survey as being an exemplary school culture and climate systems leader, and we were able to increase coherence and shared practices together. What will likely not continue is the monthly Whole Child Bridge meetings since there continues to be many demands due to school system initiatives. In addition, the analysis of outcomes indicates that the smaller School Culture Climate Leadership Team yielded a higher return on investment than the larger Whole Child Bridge structure. In fact, the larger Whole Child Bridge did not pass the “COVID-19” test;
in early March, I left a detailed agenda and slides so others could potentially facilitate the meeting, but it was postponed as nobody stepped in to lead.

In contrast, there has always been a team member from the smaller workgroup who will volunteer to facilitate the meeting; there is an evident higher value in the formal School Culture Climate Leadership Team collaborative structure even as in-person meetings had to shift to virtual meetings during the pandemic. The Ed. Services Leadership Team and All Ed. Services Monthly Meeting also passed the “COVID-19” test with flying colors. We fluidly shifted our meetings from in-person to virtual. In addition, I adjusted the meeting time from two-hour to one-hour since one-hour was the average amount of time participants could stay actively engaged during virtual meetings.

One main analysis insight is that these formal “Above the Green Line” structures aid the coherence “Below the Green Line” meaning-making. I was able to work with colleagues through the emergent collaborative structures to devise a “Year 1, Tier 1” template plan that would equip schools to utilize Dr. Ball’s American Education Research Association Video on Discretionary Spaces (2018). The more I increased my knowledge of the elements of the “Seven Circle Model” through professional learning, the more effective I became as a systems-level leader. As I listened to the numerous audio reflections, I realized that my original theory of organizational change shifted from the corporate, dominant view of strategy and plans as a measurement of outcomes to a more counter-cultural and whole-systems view of measuring success through the building of understanding and processes. The following section will harness the analysis of levers, barriers, and insights to prospect further systems-level leadership implications for self, site, and sector.
Implications for Self

The goals I set for my leadership at the beginning of the strategic project was to lead a change effort that would be meaningful and relevant to the community. In a memo I wrote to Superintendent Deasy in January 2019 before I started the 10-month residency, I shared that “Stockton has the potential to be known across the nation as a place where high-quality, world-class teaching and learning is happening in all schools.” However, when I visited classrooms and initially observed how professional development also introduced concepts, skills, and strategies in ways that were isolated from the other (e.g., culturally responsive pedagogy as separate from core academic professional development), I had to remind myself that deep transformation would be a multi-year effort. As a systems-level leader in an organization faced with turbulent times and high leadership churn, I’ve learned to incorporate both the managerial actions of promoting stability while exhibiting the leadership skills of pressing for transformational change (Kotter, 2001).

Embrace organizations where they are, then take them to the next level: My initial plan was to introduce with urgency a new way of thinking, which was this integrated instructional approach. It was a worthy investment to start by unpacking what colleagues knew, visibly sharing an aspirational goal, and working with individuals and teams on designing targets, measures, and next steps. I brought a wealth of experience in leading school systems to plan for data-informed, continuous improvement-based professional development through the formation of collective social-emotional, academic leadership teams. In a world where Instructional Leadership Teams (e.g., site administrators, key teacher leaders, instructional coaches, and site-located special education staff members)
were often siloed from Student Assistant Program or CARE Teams (e.g., site administrators, counselors, and parent liaisons), I was confident that merging these teams would lead to increased social-emotional and academic support for school communities.

It took many conversations, visuals, and graphics, before I realized that colleagues wanted to go back to using the Multi-Tiered Systems of Supports (MTSS) framework. SUSD colleagues were already familiar with MTSS, and had the schema built in their minds through past professional learning, so many viewed it as a logical next step. Institutional knowledge was held in many different places, and literally lived in the minds and practices of various colleagues. It took many formal structures such as the Whole Child Bridge and the School Culture Climate Leadership Team meetings, as well as more informal structures such as hallway conversations, to be able to unpack what others had seen and experienced. “Seeing the schema” and understanding what’s in the mind and practices of colleagues takes time and intentionality.

**Stay persistent, consistent, and clear in the process:** In a system where leadership churn has been the norm, a retiring administrator who has served SUSD for over 35 years, shared that this school year was the first where the Ed. Services Leadership Team worked cohesively and consistently within and across departments. The veteran administrator noted the gift and legacy I have left with Stockton is the creation of a process that functions to work together as a collective: “The way you provided consistent, clear, high-quality professional learning set the bar for us, so that we can also expect high expectations for our system. You created a new group and showed us how to come together. The agendas and quality
content are there in Google folders, so others can pick up the work with continuity and clarity” (personal communication, April 2020).

**Know your sphere of influence, expand it wisely, and be aware of your authorizing environment:** I interacted and collaborated with the Superintendent, Executive Cabinet, and the Assistant Superintendents who were all instrumental in setting the stage for me to enter and lead. The advantage of having that authorized environment meant that when you planned a meeting, people showed up. An intermittent occurrence that I found fascinating was the question colleagues would ask: “Does the Superintendent think that ____?” I didn’t quite understand why people would pose that question until I probed a few SUSD colleagues. Colleagues who have worked in Stockton for over a decade have experienced the organization as a place of great transition. Leaders of departments had experienced factions and issues of power and control in the past, so many colleagues ultimately made decisions based on compliance instead of autonomously.

In my previous position, I was a visible leader to hundreds of site administrators since I led their professional learning structures and supervised their performance. Since I was positioned to work in a Chief of Staff-like role with the Assistant Superintendent of Ed. Services, I had more access to in-person interactions with executive leaders and central office colleagues than site leaders. Implications include continuing to develop the broader community of leaders to build and expand their authorizing environments so that overall individual and collective efficacy could grow.
Implications for Site

Sustainability: The strategic project points to the desire of colleagues across systems to increase the level of communication, collaboration, and alignment. During the “October 16th San Francisco Learning Visit,” we were encouraged by San Francisco’s Chief of Support Services to build and bridge cross-departmental relationships by focusing on one main professional learning priority, such as restorative justice. Even though there were barriers such as being located in different buildings across town, we learned that the key to sustainability is that every individual member within and across Ed. Services, Support Services, and school sites should know about each other’s roles, resources, priorities, strategy, and function. SUSD should continue to invest in deepening the understanding of site and central office support to increase opportunities for schools to access increased coordination and interactions.

Engage the “lay” leaders: When planning for initiatives and professional development at the school site level, the team should include “lay” people who are colleagues that may be overlooked because they are not in the most senior position. Depending on experience and knowledge of school sites and institutional information, these laypersons (e.g., counselors and coaches) can be highly effective because they bring a closer lens to revealing useful relational “Below the Green Line” and technical “Above the Green Line” understanding that senior leaders with varying perspectives may not be knowledgeable about.

To disrupt systems of oppression, consider empowering individuals. The challenge is that many individuals in the organization do not see their identity as being an “authorizer” in the environment; these colleagues need to be invited and tasked to do the work.
Include site administrators and staff: Systems-level leaders are in the practice of meeting in leadership teams and making decisions on behalf of sites. To be fair, central office members do consider ways to engage sites for input and feedback, such as surveys, conversation, and more formalized structures such as the Superintendent’s Employee Advisory Group. However, central office members should include trusted site colleagues to join them at the table more often during decision-making meetings to test out communications, strategies, and initiatives prior to implementation.

Outsourcing professional development to external organizations requires additional structured time to build coherence: SUSD has a number of partner organizations such as Unbound Ed, New Leaders, Pivot, CORE, Hatching for Results, Nicole Anderson Equity, and Sharroky Hollie Culturally Responsive Pedagogy. In addition, each specialty area (e.g., Language Development Office, Visual and Performing Arts, STEM, Visual and Performing Arts, After School, Native American Programs, and Athletics) has their own initiatives and professional learning opportunities. Partner meetings, such as the quarterly meetings with SUSD, Pivot, CORE, Unbound Ed, and New Leaders, are essential. With so many different and moving pieces, central office and site staff require additional clarity on how to integrate content and practices such as culturally responsive pedagogy, AVID, and equity-based strategies with the two new curricula.

It is recommended that the Executive Cabinet hold a session where a select group of trusted site staff are invited to share about what professional development opportunities have been available and to provide input on the value of the multitude of offerings from Ed. Services and Support Services. Through that
process, SUSD should cut out any professional development that is not producing a strong return on investments based on student and adult outcomes inclusive of qualitative and quantitative data. Too many offerings lead to more difficulty in coherence and alignment because individuals then struggle how to make meaning and apply it in coherent ways.

The video “AERA 2018 Presidential Address Dr. Deborah Lowenberg Ball” starting at the 1 hour 23-minute point features the interaction between two Black students Anaya and Toni and the intersection of race, equity, math content, academic cognition, behavior, social-emotional development, implicit bias, teacher-student relationships, culturally responsive pedagogy, and discretionary spaces (AERA, 2018). During the February 2020 Aspen Institute Network Retreat, I viewed the video segment, then engaged in a deep discussion with Chief Academic Officers and Chief School Officers from 10 large school systems. The video poignantly demonstrated the intersection of social-emotional, academic development. If every teacher, counselor, administrator, parent, and community member could understand and apply the learnings from discretionary spaces with a student-focused, equity-based lens, we could cut out the other professional learning opportunities since the AERA video combines and integrates the components of other training offered in siloed ways.
Implications for Sector

**Mindset Matters:** Mindset drives practices. Mindset is also very difficult to change. National Equity Project’s “Seven Circle Model” conveys how “the way we act and work together” and “the way we make meaning” are situated within systems of inequitable structures. For all youth to be successful in Stockton as well as in school systems all over the nation, the learning and leadership growth of the adults in their understanding of race and equity in all interactions, including those with colleagues within and across central office, towards a coherent mission is a worthy investment. It will take adults taking an open stance to view their experiences as “object” when they are “subject” to the experience (Kegan et al., 2016).

**Beware of “SCARF” threats:** School systems should find ways to couple all initiatives with the intentional and visible integration of a student-focused, equity-based lens that incorporates cultural responsiveness and restorative practices. What gets in the way of shifting instruction towards student agency? Control and “SCARF” threats, which can be related to Status, Certainty, Autonomy, Relationships, and/or Fairness (Rock, 2008). School systems across the nation should be aware and beware of “SCARF” threats that can inhibit individuals from being able to shift their mindsets and practices to a more integrated, student-centered whole child and whole systems approach.

**Build political support:** For school systems faced with great leadership churn, one may have the strongest strategic plan for building coherence, leadership development, and social-emotional, academic development; however, a systems-level leader needs to be able to analyze the barriers and find ways to break through the entrenched systems of structural racism and inequity. With our
racial and class tensions continuing to build within our nation and across the
globe, careful examination of one’s political clout and environment is necessary.
Systems-level leaders must also seek allies in the organization of diverse
backgrounds and with varied positional authority.

**Language as a tool for oppression or empowerment:** Throughout the
strategic project, I encountered tensions in certain terminology used by our central
office colleagues and site leaders. Here are recommendations to shift immediately:

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<td>Teachers</td>
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The language under “Stop Using” implies a traditional top-down approach. The
active participant is the one providing the “training” or the “teacher” who is
“delivering the P.D.” Instead “Start Using” words such as “professional learning,”
“offering professional learning opportunities,” and “facilitators of learning.” This
promotes the learner as the agent of change and growth. In an effort to create
systems of empowerment, any small act we can take, to engage both adults and
students as learners and leaders, has the potential to lead to significant change.
Conclusion

This capstone opens with a quote that brings to the surface the deeply ingrained systems of fragmented communication as well as the inherently siloed nature of school systems. It closes with three excerpts from Stockton Unified School District leaders that reflect National Equity Project’s “Seven Circle Model”: 1) “Above the Green Line” technical leadership areas, which relates to systems, strategies, and processes, 2) “Below the Green Line” relational dynamics of information, and 3) Systems of Oppression.

1) “Above the Green line” technical leadership areas, which relate to systems, strategies and processes

“Sitting at the table has made a difference. Today was very productive and how to approach the classroom and integrate it [equity]. How to present professional development and what [name of our principal team representative] said, ‘We are part of a bigger picture’ [not just in siloed service areas]. [It] validated my philosophy that we don’t go and take over, we support. Combined Ed. Services and Student Support is the key” (Support Services Leader, communication, 2020).

2) “Below the Green Line” relational dynamics of information

“I had the chance to know them as a person… to see the people under the people. It was a pivotal moment, getting to know the other as a person and developing relationships” (Support Services Colleague, communication, 2020).

3) Systems of Empowerment

“Personally and professionally, it has empowered me. I’m part of a team that sees me. [Name] has a voice - I’m part of a real goal. Very valuable - the value in myself has grown” (Ed. Services Colleague, communication, 2020).

If I could offer a concluding framework, I would present an “Eight Circle Model” (i.e., the “Seven Circle Model” with the addition of a larger circle encompassing the entire model with the words “System of Empowerment”). It is
true that school organizations and educational systems are situated in systems of oppression; however, as change-makers and systems-level, transformational leaders, our frame of reference and hope for opportunity needs to include individual and collective voices, and shift towards empowerment with continuity.

The Whole Child Bridge Project, and the many leadership actions involved in the process, led to an increase in SUSD’s level of collaboration, coordination, and alignment from 3.1 to 6.2 on a ten-point scale within the short span of six months. What would need to happen to continue to double the level of collaboration, communication, and coherence across departments and take the system to a 9.3 rating on the ten-point scale? Undoing the systems of oppression and working on the technical “Above the Green Line,” the relational “Below the Green Line,” and shifting towards systems of empowerment.

School systems often add initiatives, curriculum, programs, and strategies. One needs to be mindful that the challenge in school systems also involves subtracting practices and behaviors that do not empower students to reach their potential. School systems need to shift towards a student-focused approach that does not replicate the traditional teacher-directed practices, but instead elevates and lifts up circumstances of poverty and scarcity through the integration of student agency and ownership. Central office departments must work across functions to disrupt inequitable systems of silos and provide “Whole Child - Whole Schools - Whole Systems” impact.
Bibliography


Appendix A

Building #StocktonStrong
Source: https://www.stocktonusd.net/site/Default.aspx?PageID=11371
Retrieved on 8/30/19

Building #StocktonStrong
Upon the completion of this administration’s first six months of leadership and service to Stockton and Stockton Unified School District, and after completing a period of listening and learning, it is time to propose our way forward – a way to begin the process of dramatically improving the outcomes for all youth in academics, community participation, responsibility and career preparation.

This proposed ‘way forward’ is intended to be a roadmap for the next 3-5 years. It is designed to be specifically thematic and not dogmatic. Such a roadmap provides the best way to a proposed destination. I believe now more than ever that we must continue to be clear about our destination, which is that all youth can and will graduate college-, career, and community-ready. In doing so, we will lift youth out of poverty.

Therefore, we will set to work on several fronts:
   1. Culture and Community in our Schools
   2. Supporting Elements
   3. Theories of Action, Instruction, and Change

In addition, we will establish and understand Theory of Action, which supports a Theory of Instruction, based upon a Theory of Change; all three sit upon the equity agenda.

Superintendent John Deasy has created nine Tiger Teams to support these initiatives in the following areas:
- High and unambiguous expectations for adults and youth
- Trauma-informed care and instruction
- Rigorous and engaging instruction
- Development of all employees
- High-quality choices for all youth in their education
- Standards for leadership
- Authentic parent and community engagement
- Services of support for families and youth who struggle outside of our schools
- Be a system who is not confused about our mission and acts with integrity within the mission

Culture and Community in Our Schools
- We will establish a high-performing and caring culture in our schools, the school district and in our community by:
  - Establishing high and unambiguous expectations for adults and youth.
  - Implementing the support necessary for trauma-informed care and instruction.
  - Providing rigorous and engaging instruction at all levels.
  - Deeply investing in the development of all employees.
  - Ensuring high-quality choices for all youth in their education as well as their educational setting.
This will be helped by the guiding principle that we will build a system of great schools and not simply a great school system. Uneven performance averaged to an acceptable level is not being true to all youth. I believe this is supported by a strong, explicit, and transparent method of providing extensive autonomy in exchange for high accountability.

We will also establish benchmarks and goals that are growth-based over time for all groups of students, schools, and the district. We will hold ourselves accountable for reaching these high but achievable goals, celebrate our successes and remediate our failures. We will not be afraid to try bold and new ways of doing our work and we will grow accustomed to being uncomfortable in our pursuit to continually improve as adults working in service of our youth and families. And we will be afraid of failing our youth and families.

Theory of Instruction
- Our Theory of Instruction is how we believe the art of teaching and learning develops our students. In short, we will act upon a belief that high-quality, rigorous, FIRST instruction is key to our success; Instruction that is all the following:
  - Based on strong and public standards.
  - Infuses the skills and techniques for language learners for all as first instruction and not remediation.
  - Culturally relevant and engaging.
  - Invites all learners into the act of learning through grade level text and computation as a baseline and not a guideline.
  - Starts with rigorous grade level text and computation and scaffolds to success when necessary.

This theory of instruction is based on the premise that all educators are constantly improving their craft and expertise in frequent and collaborative professional development, and that this professional development is a critical part of the daily job, not an option or add on. We will become the lighthouse district for teaching and teacher quality and results. This theory of action also requires all leaders to be experts in instruction, the coaching of instructional capacities, and the deep knowledge of successful teaching and learning techniques. Our school and district leaders will be teachers first, as a model for all learning.

Supporting Elements
- Our declared goals for the dramatic improvement of our culture and community will be possible with a set of supporting elements that are for all youth and adults in SUSD. We will:
  - Develop standards for leadership in Stockton Unified at every organizational level, provide the training necessary to be an effective leader and grow as an effective leader. We will be held accountable to these standards of practice as a leader.
  - Commit to authentic parent and community engagement in service to developing a ‘parent demand-side’ approach to running our schools and system.
  - Implement a set of wrap-around services of support for families and youth who struggle outside of our schools, and we will call for an engagement in partnerships to establish these supports.
  - Be a system who is not confused about our mission and acts with integrity within the mission.
Theory of Change

- Our Theory of Change is the system we believe will best guide the improvements we seek and support our theories of instruction and action. In SUSD, I believe the best approach is one that is centered in the following:
  - Choose the best and most talented individuals to work and remain working in Stockton.
  - Provide high-quality, real choice to parents and students for learning environments and learning opportunities.
  - Develop all this work in partnership with our community.

We will invest deeply in the support and conditions for our employees, be clear about expectations for performance, monitor this performance routinely and celebrate and learn from high performing employees. We must become the model and the center in California for attracting and retaining high-quality talent in every job!

We will provide high-quality, real choice to parents and students for learning environments and learning opportunities. One type of learning environment does not fit all, so we must embrace customization and seek to innovate whenever possible. If we want to solve the current problems we have with achievement, we will need to employ methods and skills not currently being used. This is both an exciting and daunting opportunity— I look forward to leading by example and leading with support. High-quality choice must be expanded but grounded in proof of: quality of performance, quality of engagement, exemplars of instruction, leadership, parent engagement, and employee satisfaction. Such choice must also be a lighthouse in terms of successful diversity, equity, and inclusion. Examples could include: business and career pathway partnerships, lab schools, linked learning models, etc. We should see the district as a manager of a portfolio of learning options for all youth.

We will use the “community-based, community-engaged” model to develop all of this work. Deep, authentic engagement that seeks to move from advocacy to agency in our youth and parents. In short, actions that move away from being done ‘to’ our community and rather actions that are done ‘with’ our community at all levels of the organization. We will welcome problems and the emotions that come with the frustration in parents and families wanting better and see these as invitations for partnership.
Appendix B

Look Book Visual Directory Cover Page and Sample

Educational Services Look Book

Meet The Team

SUSD
Stockton Unified School District
Since 1852

Bonnie Lo - Harvard Leadership Doctoral Fellow

My role:

- I support the Educational Services Division in strengthening systems and partner with Student Support Services and Community Relations to build supports focused on the Whole Child (academic + social emotional + wellness + cultural responsiveness)

Support - Ask me about:

- Building Effective Leadership Teams
- Equity-Based & Data-Informed Continuous Improvement
- Learning Organizations - Lifelong, Joyful Learners

Email: bonnie_lo@gse.harvard.edu
Appendix C

Additional Data from February 20, 2020 All Administrators Leadership Meeting

Questions Focused on Leadership Teams

“I have a leadership team that includes the principal + assistant principal + key teacher leaders + Special Education-related colleagues + instructional-related coach + social-emotional-related colleague (e.g., counselor, mental health clinician, etc.)”

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Appendix D

Additional Data from February 20, 2020 All Administrators Leadership Meeting

Questions Focused on Central Office Supports

“Central office departments are serving sites and stakeholders effectively with Multi-Tiered Systems of Supports & School Culture and Climate.”
Appendix E

Additional Data from February 20, 2020 All Administrators Leadership Meeting

Questions Focused on Site Confidence in Leading MTSS / School Culture Work

“I feel confident in leading Multi-Tiered Systems of Supports & School Culture and Climate work at my school site.”

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## Appendix F

*Use of time and return of investment based on the analysis of the audio reflections*

### Role: Positioned as the “Chief of Staff” of Educational Services Support with higher-level strategy and organization

Goals - included to create systems and structures and increase effective leadership of Educational Services Directors and leaders

What does that look like?

- Created and co-designed the Educational Services Leadership Team (ESLT) meetings (2x’s/month)
- Created a feedback loop between ESLT and Assistant Superintendent
- Created system to use Objective and Key Results (OKRs) - to foster continuous improvement and collaboration (goal setting, targets, reflection, adjustment)
- Creation of All Education Services Monthly meeting

### Role: Positioned as the lead of the “Whole Child Bridge”

Goal - build relationships and more clarity about current context and grow in our understanding of the whole child approach

What does that look like?

- Created monthly structure for Ed. Services, Support Services and Community Relations - key leaders
- Organized cross-functional learning
  - Through the monthly structure
  - Through the Fall San Francisco Learning Visit
- Created Whole Child Bridge smaller workgroup (focus to co-create short-term goals and long-term goals)
- Co-creation and design of framework (equity, culturally responsiveness / whole child approach, Multi-Tiered Systems of Supports (MTSS), school teams)
- Design of Look Book Visual Directory (goal to promote central office as supportive to sites)
- Professional Development through Aspen Institute Network
Role: Positioned as a strategic thought-partner to bring coherence across the system

What does that look like?
1:1 Meetings
- 1:1 Meetings with Superintendent
- 1:1 Meetings with Assistant Superintendent - (Educational Services)
- 1:1 Meetings with Assistant Superintendent (Support Services)
- 1:1 Meetings with Executive Director of Curriculum & Instruction
- Participation and Input at Executive Cabinet (3x’s week)
- Participation and Input in Director’s meeting (1x’s week)
- Participation and Input in Curriculum Implementation Team Meeting (1x’s week)
- Overall Curriculum Implementation Co-Lead (1x’s week)
- Created system for Ed. Services Executive Assistant to meet on a weekly basis

Design and Innovation
- Created Ed. Services Executive Leadership Retreat Structure - Goal: to define the north star and strategic planning
- Creation of frameworks to build coherence (student centered, equity, teaching and learning, effective leadership)
Appendix G

A Sample of Creating Google Folders and Files to Increase Information Sharing

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<td>PDF Tiered Fidelity Inventory.pdf</td>
<td>me</td>
</tr>
<tr>
<td>PDF SFUSD Restorative Practice Whole...</td>
<td>me</td>
</tr>
<tr>
<td>❌ RTI. SAMPLE School Team Planni...</td>
<td>me</td>
</tr>
<tr>
<td>PDF Resolution 18-53_Presentation to ...</td>
<td>me</td>
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<tr>
<td>PDF Resolution 18-53 -Executive Sum...</td>
<td>me</td>
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<tr>
<td>PDF PBIS. Foundations and Supporting...</td>
<td>me</td>
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<tr>
<td>PDF MTSS_Framework_Final-Copy.9.20...</td>
<td>me</td>
</tr>
</tbody>
</table>
Appendix H

School Culture Climate Leadership Team Meeting (January 21, 2020)

MISSION: Through the lens of equity, all youth can and will graduate college, career, and community ready. In doing so, we will lift youth out of circumstances of scarcity and poverty.

MEETING NORMS:
- Assume positive intent - Inquiry before advocacy - Be responsible for the energy you bring
- Challenge the status quo - Active participation - Speak youth truth - Show up for one another always

MEETING OBJECTIVES:
- We will also better understand how the School Culture Climate Leadership Team is situated under SUSD’s goal of strengthening our Multi-tiered Systems of Supports and our district’s current initiatives.
- Note: this team will support short-term and long-term work forward of building a whole child - whole schools - whole system approach taking into context SUSD’s current context.
- During this meeting, we will reflect on what’s going well and what to improve in our workgroup. + Review frameworks that ground our work + Learn more about short term professional learning on 2/20 + Land on key leaders on the school culture climate / CARE / PBIS team
- As we build relationships together and work towards a stronger alignment as a cross-functional team, we will focus on the norm of inquiry before advocacy - challenge the status quo

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic/Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00-8:10</td>
<td>Welcome - Check-In</td>
</tr>
<tr>
<td></td>
<td>Norms - how we work together - share ideas - learning space before moving into</td>
</tr>
<tr>
<td></td>
<td>a planning space - inquiry before advocacy - challenge the status quo</td>
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<tr>
<td>8:10-8:40</td>
<td>Reflection Questions</td>
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<tr>
<td></td>
<td>What progress has been valuable about our work together (Ed Services +</td>
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<tr>
<td></td>
<td>Student Support Services)?</td>
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<tr>
<td></td>
<td>What do continue working on?</td>
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<tr>
<td></td>
<td>Co-creating outcomes / goals of meeting</td>
</tr>
<tr>
<td>8:40 - 9:00</td>
<td>Frameworks (Co-creation)</td>
</tr>
<tr>
<td></td>
<td>Review: equity framing is a must (Aspen Institute)</td>
</tr>
<tr>
<td></td>
<td>Maslow</td>
</tr>
<tr>
<td></td>
<td>erik’s stockton/school/class tiered matrix</td>
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<tr>
<td></td>
<td>equity umbrella framework</td>
</tr>
<tr>
<td></td>
<td>Notes: Maslow + Overarching (equity and MTSS approach) + grounded in student</td>
</tr>
<tr>
<td></td>
<td>centered</td>
</tr>
<tr>
<td>9:00-9:10</td>
<td>Planning Forward (Solidifying our next meetings)</td>
</tr>
<tr>
<td></td>
<td>Wed Feb 5 at 8 am (includes student voice)</td>
</tr>
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<td></td>
<td>Tues Feb 11 at 3 pm - Whole Child</td>
</tr>
<tr>
<td></td>
<td>Tues Feb 18 - 8 am</td>
</tr>
<tr>
<td></td>
<td>Thurs Feb 20 - 2-6 pm All Admin</td>
</tr>
<tr>
<td>9:10-9:30</td>
<td>School Team Clarity</td>
</tr>
<tr>
<td></td>
<td>Clarifying members</td>
</tr>
</tbody>
</table>
Appendix I

Excerpt from Whole Child Bridge Meeting Including Superintendent John Deasy

<table>
<thead>
<tr>
<th>The Whole Child Bridge</th>
<th>SUSD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuesday, November 12, 2019 - 3:00-4:00 pm</td>
<td></td>
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<tr>
<td>SFA Annex Rm. 1413</td>
<td></td>
</tr>
</tbody>
</table>

- Honest dialogue, what they experienced
- Importance of early intervention plan, over identification
- Communication, same voice, same message, everyone knew that each other were talking about, alignment
- Organization change is complex, timing is slow
- Tiered Fidelity inventory
- Using data, academic and social emotional data
- Focus on the whole child, how are we doing that with our schools
- Whole Child, Whole School, Whole System

Next Steps:
Workstream Structures
- Regional Directors & SS
November 15, 2019, 3:00-4:00 p.m.
- School Culture Climate Team

<table>
<thead>
<tr>
<th>3:50-4:00</th>
<th>Closing Words &amp; Moving Forward</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thankful for the work of this group, Bonnie for leading</td>
<td></td>
</tr>
<tr>
<td>1. Document: Why it happened From a Nation at Risk to a Nation at Hope</td>
<td></td>
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<tr>
<td>2. SUSD does not need a program, What I hope for us, this is about the way we act inside the system</td>
<td></td>
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<tr>
<td>3. Approach by student/population (not title, department)</td>
<td></td>
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<tr>
<td>4. Only system, education county, city=one system</td>
<td></td>
</tr>
<tr>
<td>5. Balance: Academics, A-G v. Life (housing, food scarcity etc.). No special v. regular education, based on needs of what all students need,</td>
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<tr>
<td>6. Stockton Master Innovators</td>
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<tr>
<td>a. Literature: Maya Angelou</td>
<td></td>
</tr>
<tr>
<td>b. Project</td>
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</tr>
<tr>
<td>c. Observe the adults</td>
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<tr>
<td>7. Q &amp; A</td>
<td></td>
</tr>
<tr>
<td>a. Use of titles</td>
<td></td>
</tr>
<tr>
<td>b. Social emotional-with our curriculum tasks, how do we introduce social emotional piece</td>
<td></td>
</tr>
<tr>
<td>c. Student take responsibility of progress, student led sessions,</td>
<td></td>
</tr>
<tr>
<td>d. Partnership with SUSD and SJ County</td>
<td></td>
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<tr>
<td>e. Kings Cross Study, how will this team</td>
<td></td>
</tr>
</tbody>
</table>

John Deasy
Appendix J

*Boudett & City’s (2014) Meeting Wise Checklist*

<table>
<thead>
<tr>
<th>The Meeting Wise Checklist—Full Version</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PURPOSE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Have we identified clear and important meeting <em>objectives</em> that contribute to the goal of improving learning?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. Have we established the <em>connection</em> between the work of this and other meetings in the series?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>PROCESS</strong></td>
<td></td>
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<tr>
<td>3. Have we incorporated <em>feedback</em> from previous meetings?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4. Have we chosen challenging <em>activities</em> that advance the meeting objectives and engage all participants?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>5. Have we assigned <em>roles</em>, including facilitator, timekeeper, and note taker?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>6. Have we built in time to identify and commit to <em>next steps</em>?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>7. Have we built in time for <em>assessment</em> of what worked and what didn’t in the meeting?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>PREPARATION</strong></td>
<td></td>
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</tr>
<tr>
<td>8. Have we gathered or developed <em>materials</em> (drafts, charts, etc.) that will help to focus and advance the meeting objectives?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>9. Have we determined what, if any, <em>pre-work</em> we will ask participants to do before the meeting?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td><strong>PACING</strong></td>
<td></td>
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</tr>
<tr>
<td>10. Have we put <em>time allocations</em> to each activity on the agenda?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>11. Have we ensured that we will address the <em>primary objective</em> early in the meeting?</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>12. Is it <em>realistic</em> that we could get through our agenda in the time allocated?</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>