

CONNECT

EQUITABLE ENGAGEMENT GUIDE

INTRODUCTION

WHY THIS, AND WHY NOW?

Educational equity is the recognition that the barriers marginalized students face are due to deliberate actions, and requires us to dedicate a greater amount of resources towards their removal. At Education Elements, we believe that understanding how to **connect** with the challenges your community and stakeholders are facing is the first step of redesigning systems to work for all students.



HOW WE APPROACH OUR EQUITY WORK



CONNECT

“Read the room”

- Who is most impacted by this challenge?
- How is the challenge presenting itself?
- Why does this matter?

What we guide you through:

- Authentic Communication Strategy
- Community Engagement Strategy Development and Implementation
- Dare mining and equity audits
- Connected Intelligence Professional Learning



INCLUDE

“Lead for three”

- How do we include people in the process?

What we guide you through:

- Organizational Health Survey and Coaching
- Return to school (POST COVID)
- Organizational Redesign



CREATE

“Wear your care”

- What system do we need to prioritize for greatest growth?

What we guide you through:

- Recruiting People of Color
- Creating Interview to Promotion Processes
- Leaders of Color Pipeline Development

Education Elements works to dismantle systemic educational inequities using a three-part methodology:

Connect, Include, Create.

This guide focuses on the first component of that methodology: **Connect**. We present strategies a district can use to connect more deeply with the challenges the district is seeking to address. We believe that to truly connect, one must not only empathize, but must also understand the circumstances and root causes that have created the challenge on macro and micro levels. Our Include and Create materials will share elements of engaging with your stakeholders throughout the change management process, and in designing a new solution.

Educational inequity is most often seen through the opportunity gap: the systemic issues, such as race, ZIP code, and a family's socioeconomic status, that create opportunities for some and limit them for others. Yet the problem goes much deeper. We see this inequity play out in disciplinary practices that disproportionately target Black students and students with IEPs; curriculum that over represents the dominant white culture; uniform policies that hold girls to a different standard than boys; and bathroom mandates that dismiss the rights of transgendered and gender non-conforming students and staff. All these examples ignore, dismiss, or diminish the needs of marginalized groups, which is why it is imperative we identify and **connect** with those groups first if we are to redesign systems to be more equitable.



To truly **Connect**, a leader must consider:

KEY ACTION

GUIDANCE

1

Who is most impacted
by the challenge?

Assume she does not know the answer - go to your community instead.

- Before getting to a point where you can identify what information you require to guide decision-making (i.e. feedback, buy-in, new ideas), it is important for a leader to begin at the source - your community.
- Another important part of this step is introspection.

2

How is the challenge
presenting itself?

Recognize the challenges that befell her engagement activities last time, and seek to avoid them

- Challenges with time and place, tokenizing certain groups or voices, lack of trust between community groups, and lack of rigorous data review protocols can all lead to engagement that feels more like 'checking the box'; vs. authentically connecting with one's community.

3

Why does this matter?

Engage her community to identify a problem statement.

Now that you have clarified which group(s) to engage and the challenges to avoid, it is time to generate your 'why' statement. Craft a statement that names the groups to include and the problem we will collectively tackle. Examples could be:

- We seek to collect feedback from Black parents, teacher-leaders, staff, and Black community leaders in order to increase safer learning environments for all students, especially our Black males.
- We seek secure buy-in from parents of SpEd students, principals, policy experts, and SpEd staff about structures we have developed to support SpEd students in our return plan.



Why Now?

Our team recognizes the current educational, cultural, health, financial, and political climates present unique and pressing challenges for districts across the country. These conditions **are also not new, and this guide is not meant to serve as a reactionary 'band-aid' to a festering wound.** Nevertheless, these times further reveal and exacerbate fundamental, highly damaging flaws in systems we have held dear and as 'normal' for decades.

This guide is one tool (not rulebook) to add to your toolbox as you begin to dismantle said systems, plan for returning to the new school year, introducing new initiatives, or initiate a strategic planning process. Out of the work that has already been done in equitably engaging with stakeholders, you will find linked resources of best practices and the latest and greatest throughout this document.

NAVIGATING THIS DOCUMENT

More specifically, this guide will prepare you to engage your community intentionally to glean their priorities, pain points and questions, such as:

- What is challenging our various communities most right now?
- How is the challenge presenting itself for the majority, and for communities at the margins?
- How do we limit bias as we engage with our communities, and as we review data?
- How do we build and sustain community investment before an upcoming change?
- Who do we choose who to engage, and how?



AN INTRODUCTION:

Prevalent attitudes and assumptions we see across inequitable engagement strategies

In this guide, we are going to share strategies for equitable engagement. Before we get deeper into these strategies, it is important to understand how to actively **work against** the implicit bias that many of us unknowingly and unintentionally hold.

Below, we will highlight practices pertinent to qualitative research, which is the means through which you gather insight into people's beliefs, experiences, attitudes, behavior, and interactions. In qualitative research, because the researcher is an instrument in data collection **it is especially important to understand and avoid the pitfalls of allowing opinions or assumptions to influence the design or your research tools, data collection, and interpretation of data.** We want to emphasize that researcher bias is **very common and often unintentional**; the first step to overcoming bias is becoming aware of common pitfalls.

Note that the examples below are **specific to qualitative research processes and not all engagement activities.** For example, a town hall or Q&A session would look very different. In those cases, providing your personal opinions and responding to the community may be appropriate.



Avoiding Common Bias Pitfalls

Interviewer Bias

EXPLANATION It is important to remain neutral when engaging stakeholders to give them the space to share their candid thoughts. Whether you agree or disagree with a stakeholder, it is best to refrain from articulating this during your engagement activities as it may cause them (and other participants) to alter their answers so as to seek positive feedback. Even simple gestures, facial reactions, and the tone in which you ask a question may cause a respondent to feel that you are reacting to their response. Rather, state upfront that there are no right or wrong answers and that you are there to listen. If possible, it is best to have an interviewer who is a third party and not directly connected to the topic at hand.

EXAMPLE In a focus group about access to a gifted education program, one parent states that they have directly heard the program coordinator share exclusionary beliefs. The researcher responds 'Yes, the coordinator does seem to have concerning practices. Can you tell me more about what was said?'

Even if you agree with what was said or have additional insight, it is very important to be a neutral listener when you are gathering information. In this case, even though the researcher agrees, respondents may expect that subsequent answers are being assessed and they are likely to then alter what they would normally say to elicit a positive response. Instead, you may want to follow up for specific details of the interaction and give other respondents space to share their experiences.

STRATEGIES

Design Bias

EXPLANATION Questions should be designed to allow for an open-ended narrative. Avoid leading questions that may cause a participant to feel as though a certain answer is expected.

EXAMPLE Many people found this program to be very helpful. Would you agree that this program was a success?

STRATEGIES The phrasing of this question makes the respondent feel as though they are an outlier if they do not agree. A less biased phrasing would be 'How would you evaluate the impact of this program?'

Sample Bias

EXPLANATION Ensure that your participants represent a range of ages, genders, ethnicities, and identities. There may be cases where your sample is targeted toward specific populations of interest; even so, there should be a diversity of demographic indicators in building your sample.

EXAMPLE A school district is organizing focus groups and sends an invite to all parents. Because this is a topic impacting all families, and due to difficulties recruiting participants, the district decides to not evaluate the demographics of participating parents and to randomly group parents in focus groups.

STRATEGIES Although we commonly see districts recruit for focus groups without equity in mind and to assign people to groups randomly, it is best to be thoughtful in your engagement strategies. While this does make the work more time intensive, it ensures all voices are heard and that a safe space is created to share honest thoughts and experiences. We provide tips below on bringing all voices to the table.

Avoiding Common Bias Pitfalls

Confirmation Bias

EXPLANATION When analyzing feedback, do not seek or expect a certain outcome. In doing so, you may miss important findings that do not align with your. One key strategy in avoiding confirmation bias is to delegate a researcher who is not directly involved in the relevant work or to use multiple researchers when coding your data (e.g. interview transcripts, notes)

EXAMPLE A researcher notices that multiple people have already brought up a point that they believe to be true. This appears to be an important research finding, so the researcher searches through additional notes to see where else the trend arises.

STRATEGIES Analyze for trends objectively without seeking to validate or invalidate beliefs. In the example above, the researcher is specifically seeking to validate a trend rather than continuing to objectively analyze the data. They may miss important findings or counter-beliefs by focusing on confirming their assumptions.

Analytical Bias

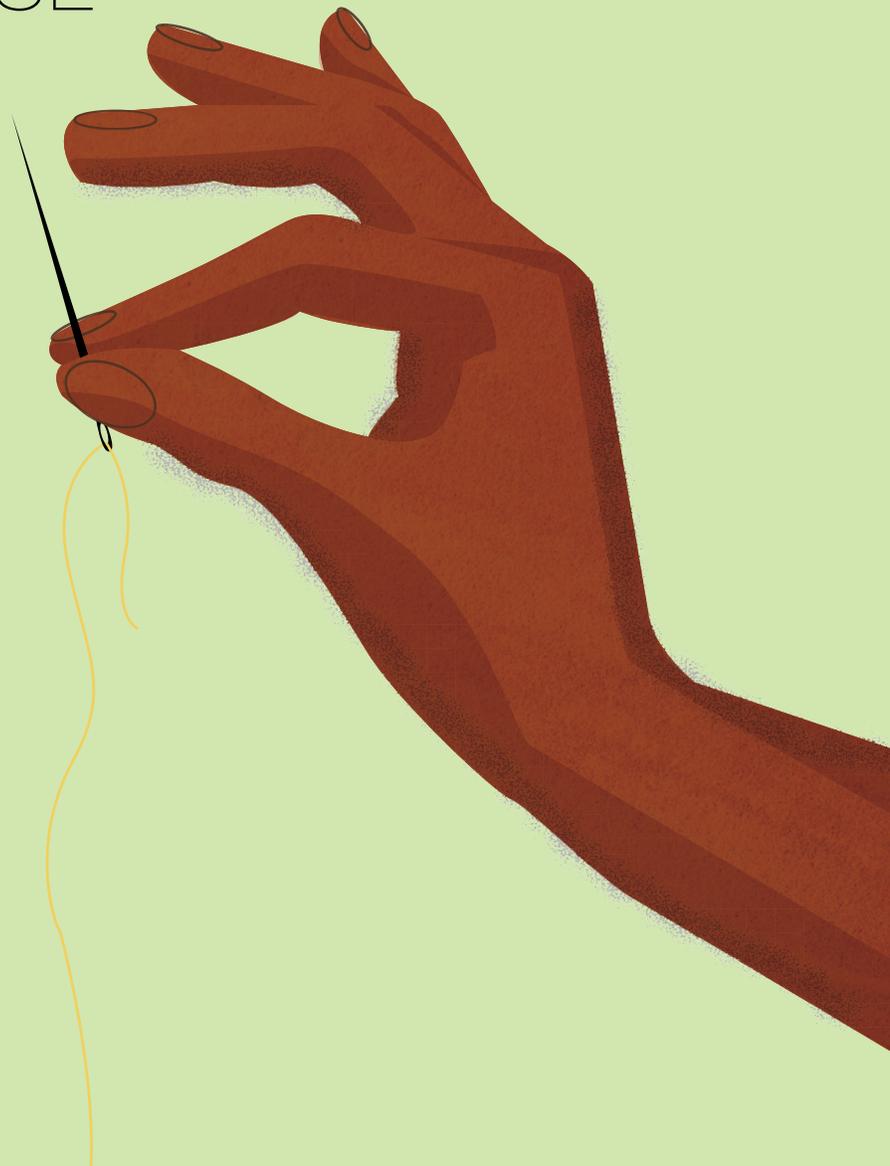
EXPLANATION Rigorous coding is one of the most important steps in minimizing bias. Merely reading responses and coming to a conclusion, while often the default approach, allows even trained researchers to fall into the trap of making inaccurate assumptions about data.

EXAMPLE A district conducted interviews with several parents and took diligent notes. To make decisions based on the interviews, they decide to read the interview notes and write a summary of the interview findings.

STRATEGIES A good researcher will read up on qualitative coding techniques to support an unbiased analysis. If your district plans to conduct extensive qualitative research, it is important that personnel take time to understand how to effectively and objectively read data or consult with an organization adept at doing so. Bias and error in analysis can make all of your hard work go to waste.



IDENTIFYING YOUR WHY FOR
CONNECTING & DIGGING INTO
THE ROOT CAUSE





When preparing to connect with our community, it is important to assume you do **not** know why the challenge exists or the system needs changing. Even with the most glaring of disparities, we notice a common pitfall of connecting and stakeholder engagement is thinking we already know what people need.

Going into an engagement activity wanting to “get feedback” or “source new ideas”, assumes a leader already has identified the challenge she seeks to address. Truly connecting is therefore rooted in figuring out the core need or challenge, which presents an opportunity to really understand and listen to your stakeholders and let them tell you what the challenge is.

KEY ACTION

GUIDANCE

1
Who is most impacted by the challenge?

Assume she does not know the answer - go to your community instead.

- Before getting to a point where you can identify what information you require to guide decision-making (i.e. feedback, buy-in, new ideas), it is important for a leader to begin at the source - your community.
- Another important part of this step is introspection.



SPOTLIGHT:

David Hardy on Connecting to the Challenge

As a district leader, there is never a shortage of challenges and people are seeking guidance or direction. **To the point, as a superintendent, it was nearly impossible to identify all of the challenges we were facing in one of the lowest performing districts in the state.** The needs were great and so were the people. I rarely met a community member who did not care deeply about their community and its schools. I had experience working in a number of districts across the country, but none like this one. It was a rare mixture of a deeply committed community, tremendous and brilliant children without the high academic performance to match. From my experience, there is usually a challenge in the community that jumps out and draws your attention, but at first blush, nothing was apparent.

Then it hit me.

I had a chance to dig into the numbers a bit more and hear from the community that represented the district's children. It became clear that the gap was not in the ability of the children or the care of the families of the children, it was the inertia of change that was rooted in who was allocated voice in decision making and direction.

In this particular case, we were looking to build our strategic plan. As a member of a number of strategic planning committees in years past, I was accustomed to how these sessions typically play out. The leader, in most cases the superintendent, casts a vision about where they would like to go and a series of cascading actions follow. Usually these actions are driven by incomplete information because of the pace and expectation people have on a district to "fix the problem". This usually resulted in leaders selecting approaches and strategies they had tried before in other spaces without deeper consideration of what is really needed.

Now that I had the opportunity to drive how we were going to approach improving outcomes for our kids, especially those that have traditionally been ignored and undersupported, I wanted to approach this differently.

Through the initial planning stages of how we were going to engage the community, we quickly saw that the demographics of the people speaking up and speaking out about the challenge ahead of us was not representative of those that are impacted. So, we changed course in how we were reaching out to our families in our district. We spent time in places of worship, barbershops, dinner tables, and community spaces that would allow us to understand the depths of the challenge. This was not met without skepticism and heavy criticism at times, but brought my team and I to a deeper level of understanding of the inequities experienced by the voiceless, and in most cases, people of color.

As a result we spent significant time engaging our community differently and more completely - to the point where one family remarked that they never had a leadership team visit them at their church and have the conversation translated in spanish for them. ***These small wins opened our eyes to the depths of the challenge.*** We knew that we would have to engage our community throughout the process and have them at the table to support the development of our strategic plan beyond understanding and connecting to the challenge. We needed them to help us identify solutions and ultimately inform the strategic plan that would drive our work together. We established townhalls and focus groups that spun off of the larger conversations that we could craft solutions that met the needs of the community.

What resulted was a realistic, community driven, action plan that was put into place unlike any other. Going into this process I expected an intense focus on academics, but through the engagement of the community, we landed a much different and better place. Our focus shifted to support the whole child and aligning our resources to do so.

As a result of our community's efforts, support, and insight on the depth of the problem faced by those most impacted, we made history. We were recognized as one of the fast improving districts in the state, and provided a different way to address a problem that was ignored for generations because those impacted were not the ones in power. We gave the power to the people and for a brief moment in time, our kids benefited.



Identifying Stakeholders To Engage

ENGAGING STAKEHOLDERS AT THE MARGINS

A typical stakeholder engagement matrix seeks to identify those who are most impacted and have the highest level of influence. While this approach is a helpful way of thinking about the stakeholders who have authority it can also unintentionally exclude stakeholders who have historically been left out of the conversation or whose voice is often minimized. For example, white parents with a high level of influence in the community may be overrepresented in stakeholder engagement simply because an environment has been created that makes them feel that their voice is the most valued and powerful. As a result, all other stakeholders are pushed to the margins. In the matrix below, we recommend prioritizing outreach for stakeholders who are highly impacted and underrepresented. Some strategies for identifying these stakeholders include:

- **Reviewing attendance data for community events**
- **Reviewing response and participation rates for qualitative research**
- **Defining who is most likely to be impacted by the outcomes of your work**

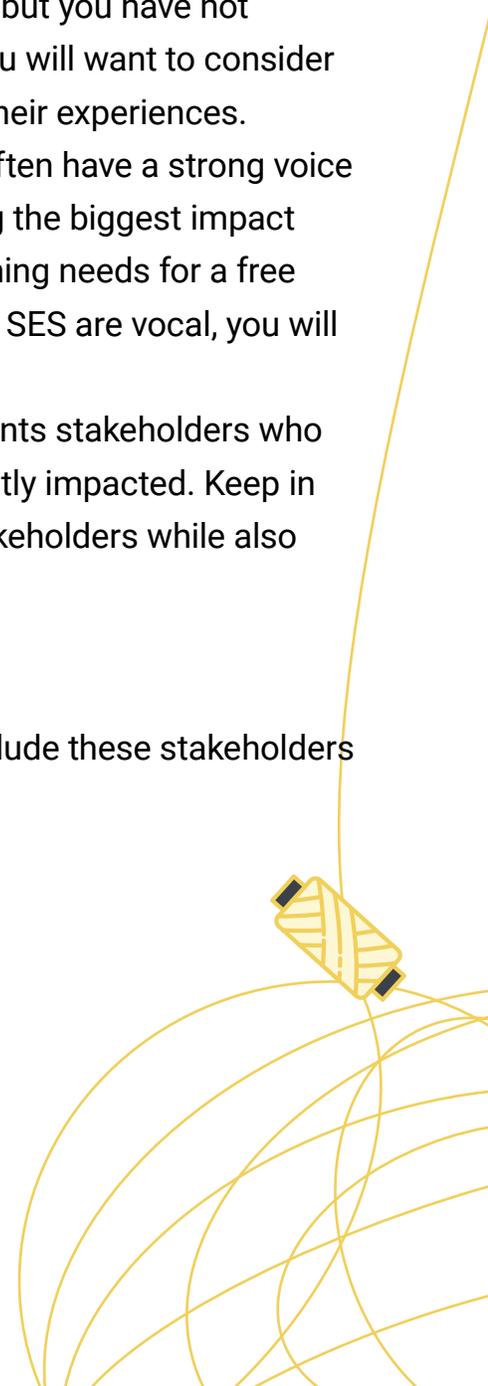


Note that the stakeholder groups who fall in each quadrant will vary depending on the district context and the topic at hand. **Indicators for each quadrant:**

- **Highly Represented and Highly Impacted:** Stakeholders in this group are those whose input is frequently considered but who also are impacted. For example, if you are looking to improve after school programming and find that parents who send their children to these programs are sharing their opinions then they would fall in this category.
- **Underrepresented and Highly Impacted:** These stakeholders experience a significant impact but their voice has historically been marginalized or not well-represented. For example, if you are looking at the impact of an ESL program but you have not successfully engaged a significant immigrant population, you will want to consider strategies that provide a space for this population to share their experiences.
- **Highly Represented and Low Impacted:** Stakeholders who often have a strong voice in the conversation but who are not necessarily experiencing the biggest impact would fall into this category. For example, if you are researching needs for a free and reduced lunch program but find that parents with a high SES are vocal, you will want to consider including more voices who are impacted.
- **Underrepresented and Low impacted:** This category represents stakeholders who are not engaged in the discussion but who are not significantly impacted. Keep in mind that it is important to engage all underrepresented stakeholders while also considering the extent to which they are impacted.

The next section provides examples of how to connect with and include these stakeholders who are underrepresented.

Highly represented High Impacted	Underrepresented Highly Impacted
Highly Represented Low impacted	Underrepresented Low impacted



CONNECT & INCLUDE
STRATEGIES



KEY ACTION

GUIDANCE

2

How is the challenge presenting itself?

Recognize the challenges that befell your engagement activities last time, and seek to avoid them

- Challenges with time and place, tokenizing certain groups or voices, lack of trust between community groups, and lack of rigorous data review protocols can all lead to engagement that feels more like 'checking the box'; vs. authentically connecting with one's community.

Common Challenge or Pitfall

Time & Place

DESCRIPTION

- There is a limited time to engage with stakeholders due to tight deadlines.
- Stakeholder participation has struggled with overrepresentation from some groups and persistent underrepresentation from other groups.

FIRST, CONNECT...

- Reflect on attendance and representation issues at past events. What events were well-attended AND had equitable representation from all groups?
- Identify who is making decisions around time and place. Whose voices are not being considered?
- Hold empathy interviews to better understand the needs and constraints of underrepresented groups.

...THEN, ENGAGE!

- Hold events in physical spaces where school or district staff are guests. Being in "someone's else's turf" changes the power dynamic that often comes with in-school events.
- Create a group that has inclusive representation to help make decisions and provide feedback on engagement events.
- Use existing events that are well attended and have equitable representation to "attach" new engagement opportunities to.



Common Challenge or Pitfall

Tokenizing

DESCRIPTION

The multitude of voices and opinions within a stakeholder group are consistently ignored, with only the most enthusiastic and visible voices (often those of leaders of community organizations) included.

FIRST, CONNECT...

- Who do we hear from most frequently and who don't we hear from? Why?
- How do we elevate the voices of the stakeholders we need to hear from the most?
- In what ways do people like to be communicated with?
- How do think about communicating differently for different people?

...THEN, ENGAGE!

- Offering virtual and in-person options that families can listen and contribute to on the go
- Offering to compensate families for participating in after-hours events

Politics

Board, Business, Local Officials

DESCRIPTION

The influence of local governing bodies forces certain decisions, leaving leaders in a position of trying to make everyone happy

Survey & Engagement Data Review

DESCRIPTION

You have an overwhelming amount of existing data from previous engagement opportunities (surveys, focus groups, etc.)

FIRST, CONNECT...

See below for a description of how to connect & engage accordingly

...THEN, ENGAGE!

Want to read more about these and other common pitfalls? Check out [this article we love](#) from Kittelson & Associates, and [this one](#) from Living Cities.

CONNECTING TO A CHALLENGE:

Data Review

Data review is a time intensive process, but doing it wrong is a major disservice to all of your hard work and the thoughtful participation of your stakeholders. Below we highlight best practices when reviewing data.

Best Practices / Considerations (translating what you heard to make decisions)

CODE DATA

Although this can be time consuming, if you are simply reading and summarizing data you open the door to bias an assumptions. Even the best researchers can make inaccurate assumptions without an object analytical process. Coding your data is a process by which you organize qualitative data (e.g. interview notes) by themes and identify relationships between these themes. This is the process that will help you understand specific challenges and needs of your stakeholders.

SECOND REVIEWER

It is helpful to have two reviewers code data to ensure an objective analysis.

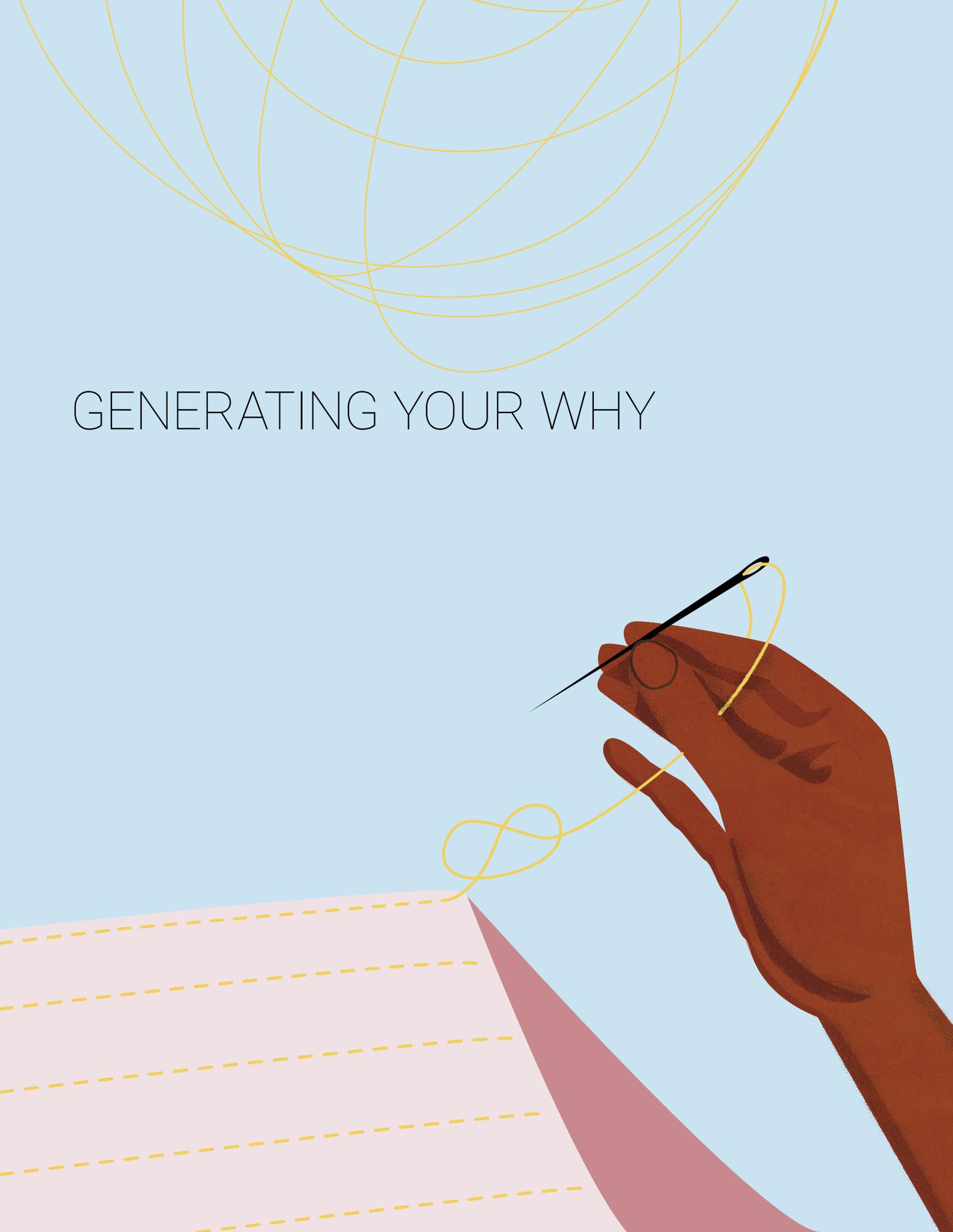
REFERENCE BEST PRACTICES

After you have identified themes in your analysis, you can map your trends to best practices through a literature review.

TRUST THE DATA

Trust the data: If you have followed the steps to design, execute, and understand stakeholder engagement equitably, understand that your stakeholders are the experts. They know their experience and needs better than you; trust what they have shared. If you are unclear about certain aspects, you may choose to conduct follow up research. But this should never be done in an attempt to alter data to fit a preconceived narrative. Trust your stakeholders; trust your data.

GENERATING YOUR WHY



KEY ACTION

GUIDANCE

3

Why does this matter?

Engage her community to identify a problem statement.

Now that you have clarified which group(s) to engage and the challenges to avoid, it is time to generate your 'why' statement. Craft a statement that names the groups to include and the problem we will collectively tackle. Examples could be:

- *We seek to collect feedback from Black parents, teacher-leaders, staff, and Black community leaders in order to increase safer learning environments for all students, especially our Black males.*
- *We seek secure buy-in from parents of SpEd students, principals, policy experts, and SpEd staff about structures we have developed to support SpEd students in our return plan.*

Want to read more about specific engagement strategies you can use?
Check out our engagement guide, [here](#).



Now What?

Once you are able to identify the depth of the problem it is important to capitalize on the energy problem identification creates. You should have found through your discovery process that there are people who not only provided clarity and impactful trends, but also should be engaged in creating the solutions.

The identification and inclusion of the people who will influence the solutions to the problem is no easy task. In too many cases we often default to inviting the people we know or those that will cause the least amount of friction during the process. However, to get to equitable outcomes, we must include those that will inform the potential solutions most completely--regardless of positions or social status--those that can bring the empathy and foresight to a better future for your children should be at this table. Those individuals need to be the people who are most impacted by future decisions. *Understanding their lived experience is one thing, helping to create a new one is another.*

These individuals should exemplify a few things:

- 1) Understand the depth of the problem to its core
- 2) Are directly impacted by the problem identified
- 3) Represent a segment of the population impacted so they can communicate future progress

Stay tuned on our Include Methodology Paper for more strategies for how to continue equitably engaging with your community.



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