Equity Decision Tools for School Leaders

Every week, Oregon's school leaders are faced with hundreds of decisions, large and small. the kinds of decisions we make in difficult conditions are the clearest reflections of our values and visions.

Three tools have been developed by ODE to support school leaders, including business managers, principals, assistant principals, teacher-leaders, and superintendents, to support making clear choices with a consistent check against key values and input.

1. Decision Tree
The first tool is titled as a "Decision Tree" and is intended as the simplest, most consistent, and easiest to use in considering difficult decisions. It can also help leaders spot patterns or gaps in their thought process or point them to the use of the other two decision tools. The decision tree is accompanied by a set of starting conditions to review and reflect on before beginning the decision process.

2. Deepening Questions
The second tool is a collection of "Deepening Questions" which offer leaders with a raft of prompts they could select from to deepen their own reflections or bring to community or staff meetings to help get underneath core decision making challenges.

3. Consultancy Protocol
Finally, we've adapted the "Consultancy Protocol," with credit to the School Reform Initiative, for use in bringing a small critical friends group together in consideration of the most difficult design and decision-making dilemmas in leading for the 2020-2021 school year.

Taken together, these three tools provide leaders with concrete resources that can improve the quality of decision-making while supporting decisions to be made.

Decision Tree

This decision tree is intended to support Oregon educational leaders facing dilemmas and choices that require thoughtful intervention, design, and problem-solving. The sequence of questions is intentional and offers key considerations that could lead to decision-making that deepens relationships and trust, and avoids unintended impacts or harm to communities. This decision tree is not intended for *simple* problems, but rather complex problems that benefit from a deliberate decision-making process.

Instructions: These five questions are designed to ensure the decision you are making has undergone thorough and meaningful analysis. This includes considering those most affected, assessing feasibility, and anticipating unforeseen variables. Identify the right level of attendance to each question based on the starting conditions. Arriving at "yes," can mean "enough to move forward, though not perfect."

Starting Conditions

Instructions: Reflect, journal, or talk with a trusted partner through these three pre-questions. Addressing and assessing each will ensure you consider the conditions and parameters for the decision you need to make. Keep your responses in mind as you move through the five questions in the decision tree.

A **What is your interior condition? Are you calm and steady, full of turmoil, reacting? Is this a state from which you wish to make this decision?**

Reflect

B **What kind of a decision is this?**
Examples: urgent, complex, urgent and complex, foundational, situational, short-term/long-term, etc.

Assess

C **What is your timeline for when you need to decide by? What other parameters will support your decision-making process?**

Parameters serve as guide rails to support a certain value in decision-making, such as using a trauma-informed lens or reconciling with fundamental safety needs.

Delineate → **Move Forward**

1 **Have you mapped out who this decision might affect and how they should inform the decision?**

No or Not Sure

- Consider including a broad coalition of people that involves different racial, linguistic, cultural, socioeconomic, geographic, gendered, etc. perspectives in your process.
- Consider identifying or centering the perspectives of affected leaders who understand the community to identify different funds of knowledge[1] and ways of knowing and being as indispensable input.
- Sketch a first version map of community assets and perspectives that could support you.

Yes

2 **How clear are you about the decision you need to make? Do you have a strong enough sense of the variables at play? Have you considered emergent or unknown variables that have bearing on the outcome?**

Yes

No or Not Sure

Consider conducting **empathy interviews** (**empathy interview protocol**) with students, families, staff, or partners to better understand the problem and/or a **root cause analysis**.

3

Is the decision you are considering feasible? Variables to consider include timing, cost, morale, staffing and capacity, safety, and knowledge.

No or Not Sure

- Consider simpler alternatives.
- Use the **consultancy protocol** to test your thinking.
- Identify what are the most constraining variables and if they are changeable.
- Consider how to expand or share the workload.

Yes

4

Does this decision build relationships, bridge conflicts, and create a deeper sense of community? Will the decision uphold the sovereignty or address impacts for the communities the decision impacts?

No or Not Sure

- Consider forms of invitation, creative response, and communication that would support deeper understanding.
- Consider holding a **facilitated forum for tensions** to be shared and considered as a wider community.
- Use the **consultancy protocol** to test your thinking.

Yes

5

Can you account for ongoing learning, flexibility, and continuous improvement processes? Is your decision nimble and responsive?

Yes

Make and communicate your decision or use the additional tools to deepen your consideration or consult if you remain unsure or unsettled.

No or Not Sure

- Consider using processes such as **equity centered design** or **continuous improvement** to design in room to iterate and improve.

1. González, N., Moll, L. C., & Amanti, C. (2005). *Funds of knowledge: Theorizing practice in households, communities, and classrooms.* Mahwah, N.J: L. Erlbaum Associates.

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Deepening Questions

Instructions: The following questions are intended to help illuminate more dynamics and variables for decision-makers. These questions, grouped in the same categories as the decision tree questions, can stand alone as reflective prompts or be used to elaborate on each of the decision tree steps.

What is the problem?

- What assumptions and beliefs are embedded in this decision? Have you assessed if they are true?
- What research has been done related to your problem/ dilemma? Are there models you can look to as an example?
- What are the conditions or variables that need to be true for your decision to work? Are there other variables that would complicate the conditions needed to make your decision a success?
- Where do you see disproportionality? Do you see over or under representation in key experiences or outcomes?
- Where do you have gaps in knowledge/resources? What additional information, insights or tools do you need in order to make a decision?

What are your interior conditions?

- What awareness, strengths, and fears do you want to use and rely on this process?
- What parts of yourself are going to be called into action?
- How much do you want to change part(s) of this community? How wide a reach do you want changes to extend?
- How might your goals differ from other perspectives you are aware of?
- What has helped you make difficult decisions in the past? What have you learned from prior mistakes?

Who are the decision-makers and designers?

- Who is included or excluded in this decision making process and why?
- What kind of design, co-development or decision-making process is being used and why?
- Have you considered new partners that are not normally part of the design or decision-making process?
- How are you using and applying a lens of culturally sustaining practices, deep learning, or antiracism?
- How are you centering safety and trauma-informed practices in the decision?

Are your solutions feasible?

- Can you reconsider your timeline for making a decision? What parts of the timeline are fixed? Where is there room for adjustments to the timeline?
- Who is able to connect with the community to communicate the decision that needs to be made? Who is able to continue engaging with families, community members, and partners? What is their capacity to engage vulnerable and marginalized community members?
- What is your current staffing capacity? What additional supports are needed to support your staff with implementing this decision?
- What guaranteed funding do you have to implement this decision? What can you reprioritize in order to be able to reallocate funding? What variables could further impact funding?

Does your decision deepen a sense of community and relational trust?

- How do your communication protocols engage community members as partners and assets?
- How are you acknowledging and valuing families' and communities' sovereign choices and unique wisdom?
- What is your staff's ability to navigate differences of power and privilege as they work with vulnerable families and communities?
- How does this decision recognize and engage different knowledges and ways of knowing?
- What assumptions, if any, are baked into your decision that require the exertion or force of power to execute?
- Is there any possibility that this decision will create traumatic (or re-traumatizing) experiences for anyone?

How are you implementing this decision? What are you learning along the way?

- Does your implementation plan allow for ongoing learning and flexibility as new dynamics emerge? How? What is iterative in your implementation plan (e.g. allowing for emergent participation, co/re-design, etc)?
- What does success look like? What evaluative measures are able to assess if the decision was a success or not? Who is held accountable and by whom throughout this implementation?
- Does your implementation plan engage/activate the community meaningfully? Considerations include:
  - How does your plan create space for collective implementation, improvement and empowerment?
  - How consistent is implementation across degrees/types of privilege, access, and power?
  - What is working? Under what conditions? And, for whom?
- Have you created space and/or processes to reflect on this decision? Considerations include:
  - Mechanisms to receive qualitative and quantitative feedback
  - Considering who provides this feedback and how you will process it
  - Being able to capture emergent variables, such as unintended consequences/impacts
  - Including multiple perspectives to reflect and iterate
  - Debriefing and learning from encounters/interactions across degrees of power/privilege
- Does this decision make school better than it has been before? How and for whom?
- What is the status of the problem after implementation? What problem are you trying to solve or what are you trying to learn? How will you know a change is an improvement? What changes could you make and why?
- How are you able to scale and elevate promising practices, solutions, and ideas from your community? Are there dynamics of power preventing local successes from sustaining or spreading?

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Dialogue and Consultancy

This consultancy protocol has been adapted from ***the one developed*** *by Faith Dunne, Paula Evans, and Gene Thompson-Grove as part of their work at the Coalition of Essential Schools and the Annenberg Institute for School Reform.*

Purpose

The consultancy is designed to develop the [presenting school leader's and all participants'] capacity to see and better understand the dilemma while uncovering new or different approaches to potential decisions or actions.

When is this the right tool?

A dilemma is a puzzle: an issue that raises questions, an idea that seems to have conceptual gaps, or something about process or product that you just can't figure out. All dilemmas have some sort of identifiable tension in them. This protocol will be useful when leaders would benefit from a "huddle" with members of their team, peers, or trusted community members who can hold the complexity of the dilemma and the kind of stretching and vulnerability that might be required to get to the strongest decision making. This protocol is not useful when the dilemma is no longer a dilemma or is already on the way to being solved.

See and better understand the dilemma being faced while uncovering new or different approaches to potential decisions or actions to take.

Pre-work prior to consultancy and dialogue:

1. Do enough reflective writing or thinking to sharpen the consultancy.

- Is it something that is bothering you enough that your thoughts regularly return to it?
- Can you affect the dilemma by changing your practice, mindset, or direction setting?
- Is it something you are willing to work on and change your mind or stance about?
- What (or where) is the tension in your dilemma?
- Who needs to change? Who needs to take action to resolve this dilemma? What is your part or responsibility in the changes you are considering?
- What assumptions influence your thinking about the dilemma?
- What is your focus question? A focus question summarizes your dilemma and helps focus the feedback.

2. Create the right conditions for a successful consultancy.

- Bound your schedule for at least one hour. More ideal is to hold the consultancy for 50 minutes and then give yourself 20-30 minutes to sit with what you hear. Form some that could be moving from a consultancy to dialogue, for others that might work best for quiet internal dialogue and reflection.
- Share our dilemma and request for consultancy with a group of three to seven people who you think can act and be critical friends at this time. Outside perspective is critical to the effectiveness of this protocol; therefore, some of the participants in the group should be people who do not share the presenter's specific dilemma at that time.

Consultancy Protocol

Time: *Approximately 50 minutes*

Roles: *Presenter, Facilitator (who sometimes participates, depending on the size of the group), "Consultants"*

Process

1. Presenter and/or facilitator welcome the Group and walk through the consultancy process briefly (3 min)

2. The presenter gives an overview and challenges of the dilemma, and frames a question for the consultancy group to consider. The framing of this question, as well as the quality of the presenter's reflection on the dilemma being discussed, are key features of this protocol. If the presenter has brought any "artifacts" there is a pause here to silently examine the work/ documents. The focus of the group's conversation is on the dilemma. (10-15 minutes if there are artifacts to examine)

3. The consultancy group asks clarifying questions of the presenter — that is, questions that have brief, factual answers. (5 minutes)

4. The group asks probing questions of the presenter. The goal is for the presenter to learn more about the question they framed and to do some analysis of the dilemma presented. The presenter responds to the group's questions, although sometimes a probing question might ask the presenter to see the dilemma in such a novel way that the response is simply, "I never thought about it that way." There is no discussion by the consultancy group of the presenter's responses. At the end of the 10 minutes, the facilitator asks the presenter to restate their focusing question for the group. (10 minutes)

5. The group talks with each other about the dilemma presented. In this step, the group works to define the issues more thoroughly and objectively. Sometimes members of the group suggest actions the presenter might consider taking; if they do, these should be framed as "open suggestions," and should be made only after the group has thoroughly analyzed the dilemma. The presenter doesn't speak during this discussion, but listens in and takes notes. Often, while awkward at first, groups find that talking about the presenter in the third person helps the presenter listen and not feel pressure to respond. (15 minutes)

Possible questions to frame the discussion:

- What did we hear?
- What didn't we hear that might be relevant?
- What assumptions seem to be operating?
- What questions does the dilemma raise for us?
- What do we think about the dilemma?
- What might we do or try if faced with a similar dilemma?
- What have we done in similar situations?

6. The presenter reflects on what they heard and on what they are now thinking, sharing with the group anything that particularly resonated during any part of the Consultancy. (5 minutes)

7. The facilitator leads a brief conversation about the group's observation of the Consultancy process. (5 minutes)

End of protocol and opportunity to move into dialogue as a group or for the presenter to have space to digest the learning and insights offered from the process to support clearer decision-making

Clarifying questions are for the person asking them. They ask the presenter "who, what, where, when, and how." These are not "why" questions. They can be answered quickly and succinctly, often with a phrase or two. The presenter has ready answers to clarifying questions.

Probing questions are for the person answering them. They ask the presenter "why" (among other things), and are open-ended. They take longer to answer, and often require deep thought on the part of the presenter before she/he speaks. Group members are encouraged to avoid suggestions and recommendations disguised as questions ("Don't you think you should…?" or "Have you ever thought about…?")