

**SOUTH SAN FRANCISCO UNIFIED SCHOOL DISTRICT  
BOARD OF TRUSTEES  
AGENDA AND ORDER OF BUSINESS  
Special Meeting/Board Study Session, Monday, April 26, 2021**

**CORONAVIRUS DISEASE (COVID-19) NOTICE**

This meeting will be conducted pursuant to the provisions of the Governor's Executive Order N-35-20 issued on March 21, 2020 allowing for deviation of teleconference rules required by the Brown Act and pursuant to the order of the Health Officer of San Mateo County dated March 31, 2020 as this meeting is necessary so that the South San Francisco Unified School District can conduct necessary business and is permitted under the order as an essential governmental function.

The Board of Trustees invites the community to participate in the meeting virtually.

The Board meeting will be streamed live and you can view it by visiting this web page for the Board meeting streaming link:

<http://www.ssfusd.org/onlineboardmeeting>

*(The link will be active shortly before 6:00 p.m. on April 26)*

**OPEN SESSION - 6:00 p.m.**

- A. CALL TO ORDER**
- B. ROLL CALL**
- C. PLEDGE OF ALLEGIANCE**
- D. COMMUNICATIONS**

Public comments may be submitted in advance of the meeting through the following link: <http://bit.ly/boardmeetingapril26> beginning at 1:00 p.m. on Thursday, April 22, until 3:00 p.m. on Monday, April 26. These comments will be read by all Board members and posted on the District website's 2020-21 Board meetings page <https://www.ssfusd.org/20202021boardmeetings> prior to the meeting.

To comment during the meeting, please use the following link:

<https://www.ssfusd.org/publiccomment>

**NOTE:** You will need to register and follow the instructions to comment during the meeting.

The meeting is recorded. Individuals may address the Board concerning school business not on the agenda, but public comment cannot be acted upon or

discussed by the Board unless placed on the agenda at a subsequent meeting, in accordance with the law, the Brown Act. The Board may request staff to respond orally at the meeting or in writing at a future time.

## **INFORMATION/DISCUSSION**

### **1. ADMINISTRATION**

#### **a. Equity Network 2.0**

The Board of Trustees and Superintendent have quarterly meetings this year with a focus on leading through the lens of equity. The Board Governance Team will discuss and take action on local Board policies through the lens of educational equity in SSFUSD.

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## **ADJOURNMENT**

The agenda is available for review at the District's website: [www.ssfusd.org](http://www.ssfusd.org) (Click on *Board Meeting Agendas and Minutes*).

A recording is made of the Open Session of each meeting. Telephone--(650) 877-8705, Fax--(650) 588-8113 or e-mail: [ncantley@ssfusd.org](mailto:ncantley@ssfusd.org)

**South San Francisco Unified School District  
Board Study Session Agenda  
“Effective Governance with an Equity Lens”**

**April 26, 2021 6-8pm**

**Facilitator(s):**

**Nicole Anderson and Associates Consulting, LLC (Nicole Anderson, Deborah Keys Write, Dr. Shelley Holt)**

Agenda Topic(s)	Notes
<b>Welcome/District Update:</b> <ul style="list-style-type: none"> <li>○ Purpose/background/racial equity work</li> <li>○ Public comment</li> </ul>	
<b>Session Overview:</b> <ul style="list-style-type: none"> <li>○ Purpose/outcomes</li> <li>○ Revisiting the 4 agreements</li> </ul>	
<b>Content Building:</b> <ul style="list-style-type: none"> <li>● Equity in Education overview</li> <li>● Barriers to Equity</li> <li>● Equity statement development</li> </ul>	
<b>Role of Governance Team:</b> <ul style="list-style-type: none"> <li>○ Effective governance practices recap</li> <li>○ Board assessment recap</li> <li>○ Role of Board and Superintendent recap</li> <li>○ Protocols/Norms (handbook connections)</li> </ul>	
<b>Prioritizing Governance Equity Work:</b> <ul style="list-style-type: none"> <li>○ Vision of the Board</li> <li>○ Priorities vs. Hot Topics</li> <li>○ Questions with purpose</li> <li>○ Decision making process</li> </ul>	
<b>Equity Impact Action Planning :</b> <ul style="list-style-type: none"> <li>○ Systems approach to equity driven governance</li> <li>○ Equity policy development/Admin Regulations</li> <li>○ Strategic equity action plan alignment with LCAP</li> <li>○ Leveraging the equity task force</li> </ul>	
<b>Next Steps/Adjournment:</b> <ul style="list-style-type: none"> <li>○ Developing/evolving equity statement, policy, plan</li> <li>○ Prioritizing governance work</li> <li>○ Leveraging the equity task force</li> </ul>	

## School Board Equity Assessment

According to the Center for Public Education Report in 2011, there are eight characteristics of an effective school boards. School board members are encouraged to embrace each these characteristics with an equity lens in addition to three board actions to guide the work. Please complete with fellow board members to assess the basic functioning of your governance board as a precursor to the examination, revision, and creation of equity focused policy and practice.

To what extent does your school board effectively demonstrate the following characteristics?	Not Effective	Somewhat Effective	Very Effective
1. Our school board commits to a vision for equity through high expectations for student achievement and quality instruction and define clear goals toward that vision.			
2. Our school board has strong shared beliefs and values about equity for students and their ability to learn, and of the system and its ability to teach all children at high levels.			
3. Our school board has a collaborative relationship with staff and the community and establish a strong communications structure to inform and engage both internal and external stakeholders in setting and achieving district goals around equity.			
4. Our school board is accountability driven, spending less time on operational issues and more time focused on equity and policies to improve student achievement.			
5. Our school board is data savvy; we embrace and monitor quantitative and qualitative data, even when the information is negative, and use it to drive continuous improvement to close equity gaps.			
6. Our school board aligns, monitors, and sustains resources, such as equity focused professional development, to meet district goals.			
7. Our school board leads as a united team with the superintendent, each from our respective roles, with mutual trust and strong equity focused collaboration.			
8. Our school board takes part in team development and equity focused training, sometimes with our superintendent, to build shared knowledge, values and commitments for our equity efforts.			
To what extent has the school board developed and implemented the following:	Not drafted/adopted	Drafted	Adopted
9. Our school board has developed an equity statement			
10. Our school board has developed an equity policy			
11. Our school board has developed an equity impact action plan to strategically address and measure the impact of the district's equity policies and practices for target student group achievement			

**DRAFT**

## **Board Policy**

Equity

BP 0415(a)

Students

**Revised** Proposed Equity Policy Statement South San Francisco Unified School District

### **Vision**

The Governing Board reaffirms its commitment to provide an environment that is culturally sensitive and free from bias and discrimination that protects students from physical and emotional harm. The Board commits to ensuring that all stakeholders uphold educational equity as an essential principle of our school system that is integrated into all policies, practices, operations and processes in order to yield equitable educational outcomes for all students.

### **Guiding Philosophy**

The Board's guiding philosophy for this board policy is:

1. The future of our community and country depends on students possessing the skills to be contributing members of a democratic society.
2. All students can learn and succeed to become college, career and life ready.
  1. 3. The diversity of the school population and staff enriches students learning experiences.
4. A safe, welcoming, and culturally responsive school climate is necessary for learning.

### **Purpose**

The Board recognizes that achievement and opportunity gaps and disparate discipline actions exist among student groups. The Board establishes this board policy to ensure all students, regardless of disability, ethnicity, gender, gender expression, gender identity, immigration status, language, nationality, parental status, race, religion, sexual orientation, socioeconomic status or association with a person or group with one or more of these actual or perceived characteristics, will have access to equitable resources and opportunities to participate fully in the educational process.

(cf. 0100 - Philosophy)

(cf. 0200 – Mission and Goals for the District)

(cf. 0400 - Comprehensive Plans)

(cf. 5000 - Students)

(cf. 4000 - Concepts and Roles in Student Personnel)

(cf. 9000 - Role of the Board)

The responsibility for educating students is shared amongst all District stakeholders. Eliminating practices that perpetuate a disparate impact on student learning is imperative. The Board acknowledges educational equity is integral to the District's overall mission and core values.

**BP 0415(b)**

April 26, 2021

## **EDUCATIONAL EQUITY** (continued)

(cf. 0200 - Philosophy, Goals, Objectives and Comprehensive Plans)

(cf. 0460 - Local Control and Accountability Plan)

### **Definition**

Equity, in SSFUSD, is defined as giving students what they need, when they need it. Future, equity means ensuring equal access to educational opportunity for all students by minimizing or eliminating the impact of disparities in abilities, levels of preparation, available resources and socio-cultural differences in achievement and performance so that all students may perform at optimum levels.

The South San Francisco Unified School District is strongly committed to maintaining high expectations for all of its students and to eliminate historical barriers, persistent disparities in achievement, performance and socio-emotional adjustment among subgroups based on race, ethnicity, language, national origin, gender, sexual orientation, gender identity, gender expression, socio-economic status or disability.

Educational equity is a means of ensuring the decisions, policies and practices in our system are culturally sensitive and provide all students with access, opportunity, resources and support to: meet students' individual needs to learn, grow, and develop in a safe and healthy environment; support all stakeholders in advocating for fairness; and ensure the ultimate outcome of all students becoming college, career and life ready.

The Board shall make decisions with a deliberate awareness of impediments to learning faced by students of color and/or diverse cultural, linguistic, or socio-economic backgrounds. To ensure that equity is the intentional basis of district decisions, the Board shall consider whether its decisions address the needs of students from racial, ethnic, and indigent communities and remedy the inequities that such communities experienced in the context of a history of exclusion, discrimination, and segregation. Board decisions shall not rely on biased or stereotypical assumptions about any particular group of students.

The Board understands that:

- 1) Generalizing and stereotyping any group of people devalues their contributions to the District and community as a whole.
- 2) Achievement and opportunity gaps and disparate discipline that exists amongst student groups construct barriers that prevent students from realizing their fullest potential and is unacceptable.

The Superintendent or designee shall ensure:

1. Policies, programs and procedures are:
  - a. Fair, consistent and prohibitive of actual or perceived inequitable or discriminatory acts based on disability, ethnicity, gender, gender expression, gender identity, immigration status, language, nationality, parental status, race, religion, sexual orientation, socioeconomic status or association with a person or group with one or more of these actual or perceived characteristics; and
  - b. Aligned with long-term plans for implementing, reviewing and revising policies,

programs and procedures that promote equity in the District in an effort to identify and remove systemic barriers that prevent students, staff and other stakeholders' full participation or access and benefits of District programs, services and activities.

2. Financial and human resources are provided to support the work of staff, students, families and community groups in promoting equity and inclusion in our District. This includes analyzing expenditures and allocating financial and human resources in a manner that provides all students with equitable access to district programs, support services, and opportunities for success and promotes equity and inclusion in the district. Such resources include access to high-quality administrators, teachers, and other school personnel; funding; technology, equipment, textbooks, and other instructional materials; facilities; and community resources or partnerships.
3. An active approach to recruit, develop and retain District staff, administrators and teachers will be utilized, so that the District reflects the cultural and ethnic background of students and the community.
4. District discipline policies are uniform, designed to mitigate disproportionality in exclusionary practices, suspensions and expulsions amongst all student groups based on disability, ethnicity, gender, gender expression, gender identity, immigration status, language, nationality, parental status, race, religion, sexual orientation, socioeconomic status or association with a person or group with one or more of these actual or perceived characteristics.
5. District stakeholders are provided with fair and effective processes for resolving concerns and have the opportunity to challenge alleged inequitable practices with the expectation of remedy without fear of retribution. (cf. 1312.3 - Uniform Complaint Procedure)
6. Enabling and encouraging students to enroll in, participate in, and complete curricular and extracurricular courses, advanced college preparation programs, and other student activities
7. Adopting curriculum and instructional materials that accurately reflect the diversity among student groups.
8. Providing district staff with ongoing, researched-based, professional learning and professional development on culturally responsive instructional practices.

The Board shall make decisions with a deliberate awareness of impediments to learning faced by students of color and/or diverse cultural, linguistic, or socio-economic backgrounds. To ensure that equity is the intentional basis for district decisions, the Board shall consider whether its decisions address the needs of students from racial, ethnic, and indigent communities and remedy the inequities that such communities experienced in the context of a history of exclusion, discrimination, and segregation. Board decisions shall not reflect biased or stereotypical assumptions about any particular group of students.

**(REDUNDANT??)** The district will advance these goals by creating a culturally competent staff, maintaining uniformly high expectations for all, promoting rigorous curricula, promoting systems of curriculum, instruction, and assessment and professional learning opportunities, differentiating instruction, and maximizing access for all students to high-level educational opportunities. Given the urgency of this mission, the district is committed to having a proper emphasis on culturally responsive

service delivery and consistently examining and monitoring policies, programs, practices, and written documents to ensure that they are consistent with these goals.

**(REDUNDANT??)** All staff will understand how their positions contribute directly or indirectly to these goals, develop the knowledge and skills needed in their areas of influence to serve diverse students and families, and be accountable for implementing a plan that will achieve these goals. By purpose and design, the district will promote practices that provide each student with the academic, emotional and social supports needed to increase the achievement of underperforming subgroups at an accelerated rate while maintaining and increasing overall student performance. It is expected that the district will work with the broader community (the private sector, faith-based groups, community-based agencies and/or organizations, and higher education institutions, etc.) to work in concert to support all of our youth in achieving academic and social proficiency.

The South San Francisco Unified School District is committed to providing a safe, supportive, and inclusive and welcoming learning, environment for all students. This serves to ensure that students from underrepresented racial, ethnic, and cultural groups are not only treated in an inclusive way but the contributions of underrepresented groups, including those with disabilities and members of the LGBTQ communities are acknowledged and including in our history and social studies curriculum. This helps to foster opportunities and equal access to the District's educational programs and activities.

**EDUCATIONAL EQUITY (continued)**

- (cf. 4100 - Certificated Personnel)
- (cf. 4131 - Staff Development)
- (cf. 4200 - Classified Personnel)
- (cf. 4222 - Teacher Aides/Paraprofessionals)
- (cf. 4300 - Administrative and Supervisory Personnel)
- (cf. 4331 - Staff Development)
- (cf. 6173 - Education for Homeless Children)
- (cf. 6174 - Education for English Language Learners)
- (cf. 6175 - Migrant Education Program)
- (cf. 9240 - Board Development)

**Legal References:**

EDUCATION CODES

- 200 Educational Equity Purpose
- 201 Legislative Declarations and Intent (A-G)
- 210 Article 2. Definitions
- 220 Prohibition of Discrimination
- 234 - 234.5 Safe Place to Learn Act
- 32280 - 32289 School Safety Plans
- 51000 - 51009 George Miller, Jr. Education Act of 1968
- 51019 Definition of Philosophy
- 51020 Definition of Goal
- 51500 Prohibition of Instruction or Activity
- 51513 Personal Beliefs
- 52060 - 52077 Adoption of Local Control and Accountability Plan
- 60040 Portrayal of Cultural and Racial Diversity
- 60044 Prohibited Instructional Materials

CODE OF REGULATIONS, TITLE 5

- 5 CCR 3940 Maintenance of Effort

UNITED STATES CODES

- 20 U.S.C. 1400 et seq. Individuals with Disabilities in Education Act
- 20 U.S.C. 1681 et seq. Patsy Takemoto Equal Opportunity in Education Act
- 20 U.S.C. 2301 et seq. Carl D. Perkins Career and Technical Education Act of 2006
- 20 U.S.C. 5801 et seq. Education Flexibility Partnership Act of 1999
- 20 U.S.C. 6801 et seq. Technology for Education Act of 1994
- 29 U.S.C. 794 Nondiscrimination under Federal Grants and Programs
- 42 U.S.C. 2000d Section 1-101, Section 1-102 et seq. Title VI, Civil Rights Act of 1964
- 42 U.S.C. 2000d-7 Civil rights remedies equalization
- 42 U.S.C. 12101-12213 Americans with Disabilities Act of 1990

EDUCATIONAL EQUITY (continued) 28 C.F.R. 35.101 Americans with Disabilities Act  
34 C.F.R. 100-110 Chapter 1–Office for Civil Rights,  
Department of Education

OTHER PROFESSIONAL REFERENCES

Cincinnati PS Board Policy 2255 Equity and Excellence in Education (4/11/2016)

Minneapolis PS Policy 1304 Equity and Diversity (10/08/2013)

San Jose USD Equity Board Policy 0210 Philosophy, Goals, Objectives and Comprehensive Plans (5/13/2010)

U.S. DEPARTMENT OF EDUCATION, OFFICE FOR CIVIL RIGHTS PUBLICATIONS:

Dear Colleague Letter on the Nondiscriminatory Administration of School Discipline, January 2014

CSBA PUBLICATIONS: Providing a Safe, Nondiscriminatory School Environment for Transgender and Gender-Nonconforming Students, Policy Brief, February 2014

Lindsey, R.P., Robins, K. N., & Terrell, R.D. (2009). *Cultural proficiency: A manual for school leaders*. (3rd Ed). Thousand Oaks, CA: Corwin.

WEB SITES

CSBA: <http://www.csba.org>

California Department of Education: <http://www.cde.ca.gov>

U.S. Department of Education, Office for Civil Rights: <http://www.ed.gov/about/offices/list/ocr>

Gamut Online: <http://www.gamutonline.net/district/elkgrove/>

APA: [www.apa.org](http://www.apa.org)

Ed Glossary: [www.edglossary.com](http://www.edglossary.com)

Cambridge Dictionary: [www.dictionary.cambridge.org](http://www.dictionary.cambridge.org)

National Education Association Diversity Toolkit Introduction: [www.nea.org](http://www.nea.org)

Policy adopted:

SOUTH SAN FRANCISCO UNIFIED SCHOOL DISTRICT South San Francisco, California



# LEADING FOR EQUITY

A Practical Framework  
for Board Discussion and Action

**“Leading for Equity: A Practical Framework for Board Discussion and Action” was developed by the Arizona School Boards Association to assist school district governing boards in their work to achieve greater equity within their school systems and, in doing so, ensure personal or social circumstances such as gender, ability, ethnic origin, economic circumstance or family background of students are not obstacles to achieving their educational potential.**

The framework includes five essential and interrelated areas through which school boards can lead for equity.

- Defining Equity within Your Community
- Get Familiar with Your Demographics
- Dig into Your Data and Identify Opportunities for Improvement
- Practice Cultural Awareness, Agility & Competence
- Make Sure the Student Voice Is Heard

Elements within the framework can be approached non-sequentially and are intended to provide doorways that enable boards to enter and engage in leadership for equity based on their local needs and readiness.

Each element in the framework includes key questions to consider and guide discussion (“Think About”), as well as a call to consider the role of individual board members and the full board in ensuring that greater equity is achieved.

The “Leading for Equity” framework is best used in a study or work session, digging into one element at a time, or a facilitated board retreat, during which the district leadership team can work through the full framework or several selected areas.

*The Arizona School Boards Association ([www.azsba.org](http://www.azsba.org)) is a private, non-profit, non-partisan organization that cultivates excellence in locally governed school districts by providing training, leadership and essential services to public school governing boards statewide. More than 240 governing boards, representing nearly 1 million Arizona students, are members of ASBA.*

## Define Equity within Your Community

Equity and equality are often used interchangeably, but they're actually distinct ideas. Equality means every student and school gets the same access and opportunity to reach set goals. Equity recognizes that some students and schools need additional or different supports to help them reach the same benchmarks of success.

### Think About

Does our district leadership team (board and superintendent) understand the difference between equity and equality?

Do teachers and other district staff?

Does the community?

Is equity a part of our district's vision and mission, either implicitly or explicitly?

Is financial equity being discussed at our board table?

### I Can...

*Example: Suggest a study session to discuss equity versus equality and how it relates to our vision and mission.*

### The Board Can...

*Example: Request a survey of staff to determine the level of understanding of equity in education.*

## Get Familiar with Your Demographics

Understanding the different groups your district serves and in what proportion is foundational knowledge for equity-focused discussion and decision-making.

### Think About

#### Our students...

- How many students live in poverty?
- How many qualify for free or reduced price lunch?
- What is the breakdown of racial and ethnic backgrounds of our students?
- How many are in special education programs?
- How many are classified as English Language Learners?
- How many are homeless?
- What are the differences in demographics by school?

#### Our teachers...

- What is the breakdown of racial and ethnic backgrounds of our teachers? Is it different by school?
- Does the level and teacher experience and quality differ by school?
- What is the breakdown of your teaching staff by age?

#### Our community...

- How different are the demographics of the over 18 population of our community from the under-18 population?
- How about between our students' parents and community members with no children in our schools?

### I Can...

*Example: Request data from the superintendent on the number of students living in poverty and ask to observe school-based programs in place to help ensure students' basic life needs are being met.*

### The Board Can...

*Example: Request an annual overview about student subgroups districtwide and by school.*

## Dig into Your Data and Identify Opportunities for Improvement

Think about the goals you have set for your district's students and how you'll be measuring their success. Look at your current data to see how you're doing by these measures up across the board. Then begin looking at student subgroups to identify focused efforts and additional, targeted supports that will be needed to "move the needle" past your current baseline.

### Think About

How are students within various subgroups doing when it comes to proficiency in reading and math?

How about by GPA and SAT and ACT scores?

What about graduation rate?

Are the students taking AP and dual-enrollment classes representative of their school and our district?

How about the students participating in extracurricular activities?

Are certain student subgroups frequently absent or tardy?

What are our district's discipline patterns by subgroups?

Do we have policies that are barriers to students' success?

### I Can...

*Example: Learn more about how our discipline policies are applied and research alternatives like restorative justice.*

### The Board Can...

*Example: Have a study session to review trends by student subgroups, such as special education, ELL and/or race/ethnicity, in levels and frequency of discipline and the potential impact on student achievement.*

## Practice Cultural Awareness, Agility & Competence

Systems are most effective when they respond respectfully and effectively to people of all cultures, languages, classes, races, ethnic backgrounds, religions and other diversity factors in a manner that recognizes, affirms and values the worth of individuals, families and communities, and protects and preserves the dignity of each. Public schools and districts are no exception.

### Think About

Are our school environments welcoming to and respectful of students and families from all the populations we serve, including LGBTQ students?

Are our curriculum materials culturally relevant to our students?

Does our teaching staff reflect the cultures and backgrounds of the students and families we serve?

Is professional development about the cultures and backgrounds of students we serve a priority for teaching and non-teaching staff?

Are district-level community committees reflective of the diversity of our community?

Is our school board reflective of the diversity of our community?

### I Can...

*Example: Encourage and invite diverse members of the community to participate in district-level committees and attend board meetings.*

### The Board Can...

*Example: Ensure culture relevancy is included in any discussion of curricular materials, including their adoption.*

## Make Sure the Student Voice Is Heard

Student achievement and engagement increase when students have more ownership of their school community and their own learning. Tapping their expertise and knowledge can bring relevance and authenticity to the board's and district's change and improvement efforts. Students benefit from opportunities to practice problem solving, leadership and creative thinking as part of a decision-making school and district community.

### Think About

Are students partners in establishing school norms and practices?

Are students comfortable sharing their opinions in multigenerational environments?

Do students from all subgroups have leadership opportunities?

Is a diversity of student opinion not just tolerated, but sought out?

Do students have opportunities for their differences in culture and viewpoint to be cherished and appreciated, rather judged and feared?

Have we asked our students how we can serve them better?

### I Can...

*Example: Visit schools and attend student events, asking them about their experience and how it can be improved.*

### The Board Can...

*Example: Set an expectation that a diversity of students is included in decision-making on substantive school and district issues.*



**Arizona School Boards Association**  
*Cultivating excellence in locally governed school districts*  
**[www.azsba.org](http://www.azsba.org)**

# THE WATER OF SYSTEMS CHANGE

## Action Learning Exercise

### INTRODUCTION

This activity is designed to help individuals think systemically about social change, explore what is happening below the surface, and determine how they and their organizations can pursue large-scale change in a disciplined and holistic manner. We suggest that, prior to engaging in this exercise, all participants read the article [The Water of Systems Change](#) by John Kania, Mark Kramer, and Peter Senge.

### THE EXERCISE

The exercise is divided into three parts:

**Part I** uses the “inverted pyramid” introduced in [The Water of Systems Change](#) (see page 2) to perform an **external assessment** of opportunities to make progress on the social or environmental issue you are focused on.

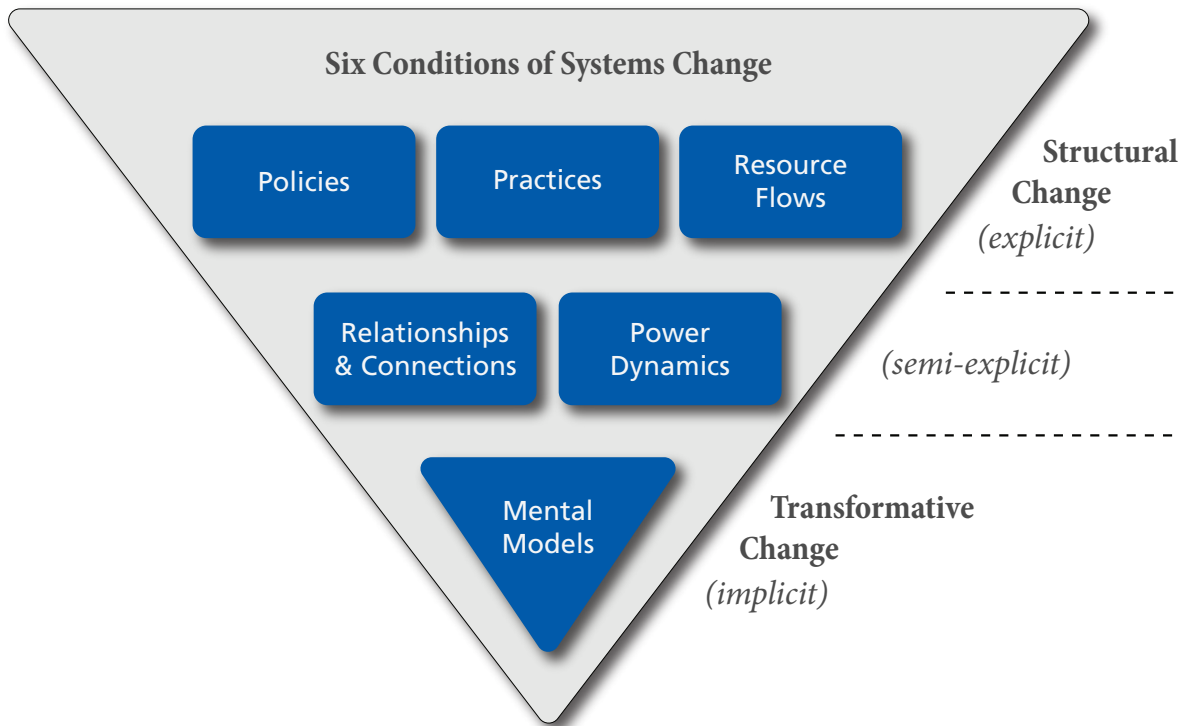
**Part II** uses the same framework to consider **internal conditions** within yourself and your organization that should change in order for you to better support progress on your issue.

**Part III** takes what was developed in Parts I and II and asks **“What to do next?”**

### SUGGESTED METHOD

Please allow 3-4 hours for the exercise. The best results will come not from doing this alone but from working with others who are also focused on the issue. The greater the number of vantage points you can include, the better the insights from the exercise will be. In addition, a facilitator may be a useful addition to the group to optimize for balance and reflection in the conversation.

# The Six Conditions of Systems Change



## DEFINITIONS



**Policies:** Rules, regulations and priorities (formal and informal).

**Practices:** Organizational and practitioner activities targeted to addressing and making progress.

**Resource Flows:** How money, people, knowledge, and information are allocated and distributed.



**Relationships & Connections:** Quality of connections and communication occurring between actors.

**Power Dynamics:** Which individuals and organizations hold decision-making power, authority, and influence (both formal and informal).



**Mental Models:** Deeply held beliefs and assumptions that influence one's actions.

# Part I: External Assessment

## Part I unfolds in three steps:

1. Identify a social problem or challenge you are passionate about making progress on.
2. Assess how the systems change conditions on page 2 might be holding the problem in place.
3. Identify potential strategies and who should be involved to address the desired change.

## ISSUE SELECTION AND IDENTIFYING ASPIRATIONS

**Question 1.** Think about an issue you are passionate about or working to improve (e.g., disparities in educational outcomes, mass incarceration). This is the issue you will be working with throughout this exercise.

**Issue:**

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**Question 2.** Consider your aspirations for outcomes you would hope to see with this issue 5 years from now. Ideally, think about improvements in outcomes that are commensurate with the scale of the problem (e.g., are related to changing the whole system or a key subset of the system). It is likely that improvements of this magnitude would require something more than expanding an individual program.

**Aspirational Outcomes:**

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## ASSESS EXTERNAL CONDITIONS

**Question 3.** Based on the aspirations you identified, **what existing elements are reinforcing current conditions** holding the problem in place? Use the template below to detail your ideas.

DIAGNOSIS: ASSESSING SYSTEMS CONDITIONS		
Systems Change Condition	Example (using education)	What existing elements are reinforcing the current conditions and hindering our progress?
 Policies	<i>School disciplinary protocols</i>	
Practices	<i>Teachers underprepared for diverse classrooms</i>	
Resource Flows	<i>Grassroots organizations starved for resources</i>	
 Relationships & Connections	<i>Parent/teacher relationships are contentious</i>	
Power Dynamics	<i>Students have no voice in school district decision-making</i>	
 Mental Models	<i>Administrator and teacher assumptions that certain students can't learn</i>	

### IDENTIFY STRATEGIES

**Question 4.** Given what you articulated on the previous page, **what strategies can help advance systems change efforts?** Who needs to be involved?

TAKING ACTION: ACTIVATING LEVERAGE POINTS AND KEY STAKEHOLDERS	
Systems Change Condition	What strategies can help advance our systems change efforts? Who would need to be involved?
 Policies	
Practices	
Resource Flows	
 Relationships & Connections	
Power Dynamics	
 Mental Models	

## Part II: Internal Assessment

We all contribute in some way, shape, or form to the problems we are attempting to solve. As said by Bill O'Brien, "The success of the intervention is based on the interior condition of the intervener."

This section provides an opportunity to think about dimensions that may need to change in your and your organization's orientation for you to better support progress against the issue that you are trying to solve.

### Part II unfolds in two steps:

1. Assess how internal conditions might be hindering your ability to achieve your external aspirations. You will consider this in two ways:
  - To what extent have your personal actions contributed to the conditions holding the problem in place?
  - To what extent are your organization's actions contributing to the conditions holding the problem in place?
2. Identify potential strategies and who should be involved to address the desired change.

### ASSESS INTERNAL CONDITIONS

**Question 5:** Thinking again about the aspirations you have for change and the strategies you devised in Part I of this exercise, **to what extent have your personal actions contributed to the conditions** holding the problem in place? **To what extent are your organization's actions contributing to the conditions** that are holding the problem in place? Use the template on the next page to record your responses.



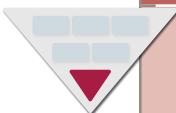
For foundations conducting this exercise, a useful background primer is FSG's report [Being the Change](#), which highlights 12 internal practices that foundations are using to transform their impact.

## DIAGNOSIS: ASSESSING INTERNAL SYSTEMS CONDITIONS

Systems Change Condition	Example (for foundations)	To what extent have your personal actions contributed to the conditions holding the problem in place?  To what extent are your organization's actions contributing to the conditions that are holding the problem in place?
Policies	<i>Grant cycles not aligned with rate of change</i>	
Practices	<i>RFP processes that favor certain organizations</i>	
Resource Flows	<i>Insufficient allocation of resources to learning and evaluation</i>	
Relationships & Connections	<i>Siloed programmatic departments</i>	
Power Dynamics	<i>Lack of candor in dialogue between board and staff</i>	
Mental Models	<i>Evaluation orientation does not account for systems change complexity</i>	

## IDENTIFY STRATEGIES

**Question 6.** Given what you articulated on the previous page, **what strategies can help advance your systems change efforts?** Who needs to be involved to affect the internal change that is necessary?

TAKING ACTION: ACTIVATING LEVERAGE POINTS AND KEY STAKEHOLDERS	
Systems Change Condition	What actions and strategies could you and your organization take to help advance your systems change efforts?  Who needs to be involved to implement these strategies?
 <p>Policies</p>	
<p>Practices</p>	
<p>Resource Flows</p>	
 <p>Relationships &amp; Connections</p>	
<p>Power Dynamics</p>	
 <p>Mental Models</p>	

## Part III: What To Do Next

If you've completed Parts I and II of this exercise, you should likely have the following output:

- An assessment of elements within the six conditions for systems change that may be holding the problem in place and hindering the impact of your work.
- Perspective on strategies that might address those elements and some thoughts on people within the system who are and who might be engaged in changing those conditions.
- An assessment of the extent to which you and your organization might be contributing to the problem you are attempting to solve.
- Perspective on strategies you might take to address your and your organization's contributions to the problem.

With this information in hand, here are a few thoughts on what you might do next:

1. At this point you are operating with hypotheses. The first step you might take would be to investigate and research the most important hypotheses you've developed to determine their validity.
2. If you already have a strategy, a good next step would be to map your findings from this exercise to the strategy you have developed. What is missing from your current strategy that you might add based on this assessment?
3. If you have yet to develop a strategy, you could consider this work to be a good starting place for your strategy. You would likely want to do additional research and analysis to validate your hypotheses before proceeding with them.
4. You might find it useful to share what you developed with a larger set of stakeholders involved with your issue. Or repeat the exercise with a different/larger group.
5. As you consider other conditions that may need to be addressed, your assessment may surface potential partners with whom you should be more connected to advance your respective goals.
6. If you are part of the staff of an organization, you could utilize the article *The Water of Systems Change*, along with the output you developed from this exercise, as a basis for a dialogue with your board about systems change.

> Learn more at [www.fsg.org/systems-thinking](http://www.fsg.org/systems-thinking)

**Notes:**

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