CALIFORNIA COLLABORATIVE on District Reform

Meeting 49 Summary
Fostering Coherence Across the State, Board, Central Office, and School Levels: Instructional Improvement in San José

February 27–28, 2023

Prepared by Linda Choi, American Institutes for Research®[1]

> *Note: This meeting summary was developed as a resource for members of the California Collaborative on District Reform. We are making this document publicly available in an effort to share the work of the Collaborative more broadly, and to inform the dialogue and decisions of educators throughout the state. This summary does not, however, contain the background and contextual information that might otherwise accompany a product created for the general public. For more information about the meeting and other Collaborative activities, please visit www.cacollaborative.org.*

In February 2023, members of the California Collaborative on District Reform convened in San José, California, to continue an exploration of coherence across the state, board, central office, and school levels in service of instructional improvement. As school systems continue to grapple with pandemic-related educator burnout, integrate new state initiatives, and navigate pressures from community members to embrace particular priorities or adopt new programs, how can they maintain focus to best serve students? Collaborative members and meeting guests examined this question over two days across multiple levels of the TK-12 system, from local school boards to schools to the central office to the state.

Exploring the Conditions for Systemic Improvement in San José

Efforts to promote a focus on teaching and learning are more likely to take hold when the systems and structures within a district are aligned with a shared vision. The meeting began with an orientation to the San José Unified School District (SJUSD) context, including its efforts to achieve financial stability, cohesive governance, collaborative labor-management relationships, and supports for teachers.

Orientation to the SJUSD Context

SJUSD is the largest school district in Santa Clara County and serves about 27,000 TK-12 students in 41 schools from Downtown San José in the north to the Almaden Valley in the south. SJUSD is Silicon Valley's largest and most diverse school system: Nearly 54% of the students are classified as Hispanic/Latino; 14% are classified as Asian; 22% are classified

---

[1] Thanks to Marina Castro, Mary Louise Baez, Emily Agopian, and Crystal Aguilera for taking careful notes to make this summary possible.

as White, and 2% are classified as Black/African American. More than a third of the students qualify for free or reduced-price lunch, and nearly one quarter of the students are English learners. SJUSD has grown to feature organizational health in a variety of domains after a period of dysfunction in the 1980s and early 1990s that led many to characterize it as a "broken district." During that time, SJUSD became the second district in the country to declare bankruptcy, was found guilty of segregating schools, navigated an unsettling leadership transition when the superintendent at the time was charged with multiple felonies, and featured acrimonious labor-management relationships that led to multiple teacher strikes. Teachers and administrators who remain in the district from that chaotic time characterize it as one without trust in the system to do right by the students. However, the hiring of new superintendent Linda Murray in 1993 sparked a long journey in which the district has made dramatic changes to rebuild trust and establish stability in its work.

Three decades after this pivotal shift and four superintendents later, district leaders describe a high level of communication and collaboration between the district and its labor partners. Additionally, the district has a reputation for stability at the superintendent and board levels. In terms of student outcomes, SJUSD was the first district in California to require A-G graduation requirements and continues to have high expectations for student success. The district takes an approach to resource allocation in which schools with higher needs have higher staffing levels—a commitment that is supported by the school board and the community. SJUSD representatives also characterize the district has having a culture of respect for teachers, buoyed by a recognition that teachers are the most important asset in the system. Superintendent Nancy Albarrán attributes the shared commitment to these approaches to the institutional memory of the district's dysfunctional past: "We know what will happen if we let things slip. We really don't want to go back to those times."

Pursuing Coherence Through Effective Governance

School boards play an instrumental role in setting and maintaining priorities for a district. However, because they are composed of elected officials who are directly accountable to the public and who increasingly absorb (or even amplify) the pressures of a polarized political environment, school boards can struggle to establish and commit to coherence in the district's work. Meeting participants had the opportunity to learn about promising practices in local governance in SJUSD and Napa Valley Unified School District (NVUSD). Superintendents and board members from these two districts shared insights and approaches to ensure alignment in their work together.

Co-developing a strategic Plan to Help Maintain Focus

In NVUSD, the school board and the superintendent collectively select annual priorities—each directly tied to a component of the district's strategic plan—to help the system maintain focus. For example, for the 2022-23 school year, NVUSD's six priorities are math alignment, high quality tier one instruction, early learning programs, mental health services, human capital, and generation of local revenues. The board evaluates the superintendent's performance according to indicators that are directly tied to these

priorities. Panelists report that they work together to ensure staff and community awareness of these priorities. Additionally, school board meeting agenda items are explicitly tied to the priorities. Superintendent Rosanna Mucetti stated, "Our strategic plan is our armor. As all the random arrows come our way, we remain focused."

In SJUSD, the central office and the school board have a similar process in which the board identifies priorities and goals through its strategic plan and supportive board policies. One SJUSD board member stated, "The strategic plan is our guiding light. If we stray from that, conversations get more difficult. And those who lose out are the students." For example, SJUSD adopted a board policy in 2010 that articulated a commitment to "ensuring that equity and inclusion are essential principles of our school system and are integrated into all policies, programs, operations, and practices."[2] The crisis of the COVID-19 pandemic provided an opportunity for the board to revisit the policy and reaffirm its commitment to vulnerable student populations. SJUSD's equity policy helps the district maintain an explicit focus on equity, and helps the district keep that focus while making sometimes difficult decisions about resource allocation. According to the panelists, setting clear priorities gives the board the courage to balance external pressures and to have difficult conversations in public spaces to advocate for what is best for the students in a system.

Providing Information That Equips Board Members to Make Informed Decisions

Although consistency in board membership can help to foster continuity, Superintendent Rosanna Mucetti cautioned that any change on a team means the team is a brand-new team. Mucetti emphasized the importance of creating a learning stance for district leaders and board members to build knowledge together. As an example, a trend of declining enrollment led to the closing of selected district schools as part of its commitment to responsibly managing financial resources. She acknowledged that such decisions are emotionally challenging and often spark spirited criticisms from affected students, parents, and community members. Mucetti explained, "If the board is going to do hard things like close schools, they need to understand why. So, a lot of information and data get shared with the team. We 'fire hose' them." One NVUSD board member added, "She disseminates the data to us so we can comprehend the issue. She gets in the informational trenches with us so we can make the difficult policy decisions."

Superintendent Albarrán described a similar orientation to governance in SJUSD and the importance of building trust with board members, as well as capacity and understanding, stating, "The staff are committed to making sure the board is prepared at meetings, that surprises are the exception not the norm, and we trust they will keep closes session information confidential." Another way that Superintendent Albarrán ensures that the SJUSD board stays informed and is continually learning is by inviting board members to join staff during site visits to see the day to day, so they have that in their minds when they make decisions."

---

[2] San José Unified School District. (2010). *BP 0210 philosophy, goals, objectives and comprehensive plans* [Log in required]. San José, CA: Author. Retrieved from http://www.gamutonline.net/DisplayPolicy/638171/

Developing Trusting Relationships to Foster Mutually Supportive Contributions to Effective Governance

Panelists emphasized the importance of trusting relationships for enabling effective governance. In the absence of trust, members of a governing team can overstep the responsibilities embedded in their roles and send mixed messages to members of a school system that threaten consistent expectations, supports, and behaviors. Superintendent Mucetti shared, "The board needs to trust the staff and their expertise. The staff needs to trust that the board doesn't have a hidden agenda. Everyone has to trust the competence in the room, and trust that we all want what's best for kids."

Given the importance of relationships and trust, one meeting participant asked the panelists about their relationships with their labor partners. One board member stated that she has a good relationship with the labor leaders and that there is a great amount of interaction and dialogue. Union leaders in SJUSD are part of the Superintendent's Cabinet. In addition, the three union presidents and the SJUSD team meet weekly, and a board member is invited to attend. Superintendent Albarrán stated, "All our members understand how important the relationship with labor is. They are big supporters of the work that needs to be done and know the workforce is essential. They prioritize employees and supports for them in the budget. Trust goes a long way."

Addressing Key Governance-Related Challenges in Specific District Contexts

After hearing panelists share their insights and approaches to creating alignment and coherence between the central office and the board in school systems, meeting participants broke into small groups to explore key challenges related to local governance from three separate districts.

One district was dealing with the challenge of addressing a controversial topic with new and young trustees whose behaviors in board meetings have suggested an unwillingness to communicate and find common ground. Another district was dealing with the challenge of a politically divided board at the same time a new superintendent was coming on board. Small group members for both district consultancies noted that the mindsets and behaviors required to be a *candidate* for school board are distinct from those required to effectively govern as a *member* of a school board. Participants therefore suggested in-person governance onboarding training in order to set clear expectations about roles and responsibilities. In addition, small group members suggested meeting with board members individually to develop relationships, build trust, and come to an understanding of each member's reason for joining the school board. In doing so, superintendents can better find common ground and alignment of motivations and priorities. However, one meeting participant cautioned that merely understanding motivations is not enough: "Everyone's aligned on doing what's best for kids, but people have different ideas on what's good for kids." The challenge lies in parsing out those differences to create conditions for teaching and learning in service of students.

A third district was grappling with the appropriate role for school board members to play with respect to the essential work of improving curriculum and instruction. The school board recently created a committee on teaching and learning whose purpose is to make recommendations to the board and review matters relating to academic-related student outcomes, curriculum adoptions, significant changes to academic offerings, pedagogy and instructional practices, and board policies and board-member sponsored resolutions that focus on teaching and learning within the district. On one hand, such a committee can elevate the importance of curriculum and instruction, providing an opportunity to ensure that various stakeholder voices are heard within the district. On the other hand, this approach could complicate efforts to maintain a clear focus within the district by putting decisions related to policy *implementation* in the hands of the board rather than clearly defining its role as a policymaking body. Feedback from small group members centered around the importance of district leadership to find the right balance between ensuring that board members and committee members feel heard in helping to set goals for the district, but also don't get too involved in issues that are beyond the scope of a school board.

Enabling Coherence at the Site Level

Despite the great strides made by SJUSD over four decades around stable governance, fiscal responsibility, collaboration with labor groups, and engagement with the community, district leaders are concerned that they are not seeing the results they would like in order to prepare SJUSD students to be the thinkers, leaders, and creators of tomorrow. Meeting participants heard from site-based educators in SJUSD to understand more about their experiences, the messages and supports they receive from the district office, the priorities that guide their work, and opportunities for strengthening an organization-wide movement toward instructional excellence.

SJUSD's Journey to Deliver Coherent, High-Quality Instruction at the Site Level

A highly centralized district, SJUSD features a model of managed instruction in which the district provides a system-wide instructional framework. Part of the district's rationale for taking this approach is the ability to create better alignment of the instructional components in a system with a high degree of student mobility. Superintendent Albarrán explained that SJUSD's transition to this approach after a history of a more decentralized instructional philosophy enabled the district to more effectively support students, staff, and parent engagement efforts, as well as improve operational efficiencies. She stated, "We went from having islands of excellence to being a system of excellence." The district creates a tight loop between professional development, instructional coaching, and analyzing teaching for better student results. However, district leaders report that despite progress toward greater coherence and alignment, they are still not achieving their desired student outcomes.

To provide a fuller picture of what supports for high-quality instruction look like, two panels—one composed of instructional coaches and the second comprising principals—

shared their experiences with the daily realities of implementing high-quality instruction while balancing external priorities and pressures.

Messaging From the Top is Clear and Ongoing

Panelists shared that communication from the central office is clear, ongoing, and takes multiple forms—from meetings of school staff to monthly bulletins to a chain of communication that travels from district administrators to site administrators, instructional coaches, and teachers. Teachers and teacher leaders identified multiple instructional initiatives they have been told to prioritize by district leaders: social-emotional learning, math learning loss, uniform grading policies, English learners, early literacy, and supporting new teachers, all within an equity lens.

Widespread Access to Coaching and Support is Available to Teachers and Coaches

In recognition of the importance of professional development that is ongoing and embedded into daily practice, the district gives teachers access to full-time instructional coaches. According to one of the coaches, "SJUSD has a very specific, tight model of support. At the core, one of our priorities is taking theory and putting it to work in the classroom every day." Another panelist described the importance of having an instructional coach when she was a novice SJUSD teacher: "I was a Teach for America member and I was going to teach for two years and go to law school. Teaching and my instructional coach changed my life. If I hadn't had my instructional coach, I wouldn't be here today. I one thousand percent believe that coaching is worth it."

The district has created a community of support for the instructional coaches as well so they can check in with one another, brainstorm, and provide emotional support to one another. One district instructional coach shared the benefit of the structures in place for instructional coaches, stating, "Education can be isolating and coaching can be even more isolating. The community we built helps and is very constructivist. We speak our truth and work through what needs to be worked through together."

One challenge the instructional coaches raised is that the coaching is teacher-driven, which, according to one panelist, can "get in the way when a teacher comes in to work on something that is different than what we feel is needed. So it's about finding a balance between working on foundational pieces and what the teacher wants."

Site Administrators Offer a Critical Additional Layer of Instructional Support

The principal's role as an instructional leader is essential for fostering high-quality instruction. Panelists described multiple supports they provide teachers. For example, they equip staff with data and facilitate the time and space to dig into the data, discuss the alignment of those data and teachers' classroom experiences, and identify solutions to persistent instructional challenges. Principals also observe teachers in the classroom and provide feedback intended to improve instructional quality. With current workforce shortages that have resulted in a small pool of available substitute teachers, principals

often cover teachers' time so they can attend professional development opportunities or observe a peer's classroom.

Panelist comments emphasized that principals' roles depend not only on these behaviors, but on the relationships they develop with their teachers. One site leader stated, "It's also about communication, trust, and understanding them as humans. That's so important. They are valuable. Their time is valuable. We have to listen to the people who work directly with the students."

Despite the Prioritization of Instruction and Supports for Teachers, Teachers are Still Feeling Overwhelmed

Panelists suggested that teachers feel supported and many have an understanding of district priorities and goals, but noted that there are not enough hours to meet the full range of students' academic, social-emotional, mental health, and physical needs. Moreover, panelists and district administrators noted that shortages in the permanent workforce and among substitute teachers make it difficult to protect time for teachers to collaborate and plan together. Thus, even with clarity about priorities and expectations, the mounting expectations for better serving students combined with limited time and energy complicate efforts to bring a vision of high-quality instruction to life in classrooms.

In small group discussions that followed the educator panels, many participants agreed that, in the words of one person, "where the rubber meets the road is the teacher in the classroom." Even with coherence in the system, the teachers are being asked to do too much. Nevertheless, small group members identified some possibilities for better supporting classroom instruction. If school systems and site administrators can find ways to protect teachers' collaboration and planning time thoughtfully and systemically—for example, during early release or late start—it can relieve some of the pressure on teachers. In addition to protecting teachers' time, building collaboration time into the school day can expand the set of beneficiaries of professional learning beyond those who opt into coaching. However, meeting participants also noted that in order to build coaching and collaboration time into the school day, issues around staffing and substitute shortages must be addressed, because "without subs, you can't get release time for everyone during the day."

Is the System Measuring the Right Things?

SJUSD district leaders sought feedback about which instructional levers in the system could promote increased student outcomes. However, meeting participants pointed out that given the coherence in SJUSD's system, a different question may be appropriate: Is the system measuring the right kinds of student outcomes? To promote reliability and accessibility, SJSUD has prioritized publicly available metrics as their primary indicators of success. However, these measures may be too far removed from the specific areas of instructional focus to appropriately capture progress. As one meeting participant stated, "It seems like there is a lot of work being done that isn't being accurately measured in the metrics being highlighted."

In seeking out answers, meeting participants pointed out some potential gaps in the system, such as systemic ways to increase student and family voice and engagement. One meeting participant stated, "If students and families were engaged differently, might the outcomes look different?" Another participant piggy-backed on this statement, adding, "At the end of the day, it's about interactions between the students and the teachers. And you can have the best instruction in a classroom, but if an English learner is not interacting with the material or the instructor, then we aren't going to see the outcomes." Systemically seeking and incorporating student feedback into district decisions has the potential to improve the quality of strategies employed in service of student learning.

Designing for Coherence at the District Level

Successful efforts to establish coherence in district improvement efforts rely on coordination among departments and leaders within the central office. Informed by the perspectives of site-based educators shared on the first day of the meeting, participants turned to the role of the central office in bridging the broad vision for district improvement with the work that teachers and leaders do in classrooms and schools. Five SJUSD district leaders participated in a fishbowl conversation to consider the implications for their work based on the insights of the principal and teacher panelists.

Provide Supports for Principals to Build Relationships with Their Staff

Panelists emphasized the importance of relationships and trust in fostering buy-in to district programs and initiatives. However, relationship-building takes time, and therefore presents a particular challenge for new principals—and for those with large staffs. District-level staff identified some structural supports they could offer for new principals, including a new-principal network and job-alike meetings where they can collectively learn skills such as analyzing data.

Make Explicit the Connections Between Different Initiatives

Although panelists described their own sense of clarity with respect to the districts' priorities—including ways in which those priorities fit together into coherent building blocks of a larger instructional framework—fishbowl participants asserted that this level of understanding is not universal throughout the district. Therefore, in addition to keeping initiatives at a minimum, district leaders could support teachers and leaders by explicitly explaining the connections between and among the various initiatives. Ongoing cross-departmental meetings at the district and open lines of communication can support this approach.

Find the Time to Follow Up at School Sites and in the Classrooms

District administrators discussed the fact that one of their practices that fell by the wayside during the pandemic and school closures was regularly visiting school sites and classrooms. Regular visits to schools and classrooms can enable district administrators to observe how the messaging about instructional initiatives and strategies carries through various levels of the system. District administrators are making a more concerted effort to

do this, and their comments highlighted additional benefits that can result from the practice. Site visits can help support campuses in an environment of workforce shortages. And they also provide the opportunity for discussion with principals about how district initiatives are going at the school site, as well as providing a forum for any questions or observations the principals wants to share.

Fostering Coherence Through the Design and Implementation of State Policy

Approaches to California K-12 education policy have evolved substantially in the past decade, transitioning from a system that featured a wide range of categorical programs to one predicated on local control. However, to take advantage of a unique influx of financial resources into the state budget and to address persistent gaps in student learning, state policymakers have established a series of new initiatives, funding streams, and accompanying reporting requirements. The meeting's final session enabled participants to consider the development and implementation of state policy that supports coherence in improvement efforts at the local level.

Finding a Balance Between the Two Ends of the Spectrum

One approach that SJUSD has employed to explore contentious issues or dilemmas is to bring in students to debate the issue. Such an approach elevates student perspectives in discussions that are fundamentally designed to better meet their needs. Furthermore, by inviting adults to listen to different points of view without directly engaging in the conversation at the outset, district leaders have found that the practice can help to de-escalate the emotional tension that often characterizes spirited differences of opinion. Building on an approach that has helped SJUSD navigate decisions about issues like earlier school start times, four students from Leland High School's award-winning debate team joined the meeting to present two sides of a debate.

One side argued for the necessity of state policies that create programs and incentives to ensure that school districts prioritize high-quality strategies to address student needs, especially for historically underserved students. The students argued that statewide accountability is vital in supporting all students, particularly historically marginalized student populations. Without this accountability to promote equity, they claimed that student needs would not be adequately addressed by the system.

The other side asserted that state policies and programs create incoherence and fragmentation in a system, and that school districts need the freedom to choose strategies that meet their local needs and enable them to maintain coherence. The students argued that in a state as diverse and large as California, with more than 1,000 school districts, homogenous policies created by the state cannot adequately meet the wide variety of student needs and school systems serving them. The districts better understand the local context as well as student needs, and therefore districts should have the control to decide how to allocate resources to equitably and coherently meet student needs.

Discussion among meeting participants and the student debaters following the debate raised the possibility of a third position that builds on the strongest points from both sides rather than insisting on positions at opposite ends of the spectrum. According to one of the students, "Debate often forces us to argue in the binary, but in arguing for the two polar opposites, you can see the middle more clearly and the third option is often the right one. Neither side is technically correct, and if you blend both sides, you get the third option." However, an effort to find middle ground is often missing from our public discourse. Participants cautioned that when the public perceives fighting between the state and school districts, it weakens the support for public education. As stakeholders at all levels seek to foster coherence in improvement efforts, striking a balance is important both in identifying promising solutions and in cultivating a strong system of public education.

Approaches to Better Foster Coherence

Building on insights from the student debate, meeting participants broke into four role-alike small groups (policymakers and advocates, funders, support providers and labor partners, and district leaders) to consider how they contribute to fragmentation in their roles, how they can best foster coherence through their input into state policy, and how they can create conditions to foster more effective conditions for coherence in state policy. A subsequent set of discussions reorganized participants into a set of small groups that featured mixed roles. Several recommendations arose across the small group discussions.

Decrease the Expectation for Policymakers to Pass New Bills

Several meeting participants pointed out that the current legislative system rewards policymakers for introducing multiple bills. California state legislators can introduce up to 35 bills per session without any consideration for how the bills they introduce fit together, yet they can point to new legislation as evidence that they are supporting the state's public education system. Thus, the incentive structures built into the legislative and electoral process reward a proliferation of new policy activity over restraint and careful design that can foster alignment among laws that shape the work of district. Combining that condition with one of rapid legislative cycles, it is difficult to effect deep change because of fragmentation. As one meeting participant observed, "I have never heard of a state policy that really created local coherence. I am open to ideas, but I do not have any." A more proactive practitioner role in identifying policy priorities—naming those actions that would support their existing efforts rather than waiting to react to policies crafted in their absence—could help local educators to channel the impulses of elected officials to write bills that are more responsive to needs at the local TK-12 level than they might otherwise write.

Remove Bureaucratic Requirements That Add Burden and Slow Progress

Policy makers often develop safeguards designed to ensure commitment to new ideas and quality of implementation. For recent grants like those designed to support community schools in California, this has led to a grant application process and will entail reporting requirements for grant recipients. These requirements will call for new district-level administrators to manage the grants. Grant administration responsibilities are usually several steps removed from the actual work on the ground and are completed with the

primary goal of demonstrating compliance. Moreover, because grant administrators are often overburdened—especially in the context of a statewide workforce shortage—the kinds of communication and collaboration required to align efforts within a district are elusive. Some small group members therefore suggested that if an improvement approach is truly backed by research and supportive of student needs, it should be offered to districts with reporting requirements that minimize burdens that can interrupt and therefore slow efforts at the district level.

Listen Sooner, and Listen at the Point of Impact

One consistent theme that emerged throughout the meeting is that multiple mandates from all levels of the system cause hardship for teachers implementing those mandates at the classroom level. As one meeting participant stated, "I feel like the recipient of incoherence." To foster better coherence and get a better understanding for how policies and programs might cause disruption for students, parents, and educators, it is important to listen early and often to the people at the point of impact. One example offered during the meeting was the recent state policy to delay high school start times because teenagers need more sleep. Though well-intended, the policy created logistical complications for school districts related to hiring and staffing bus drivers. Initiating conversations to try to understand how a policy might affect "the boots on the ground" is one step towards fostering coherence; such conversations should take place both during the design of a new policy and during its implementation.

Advocate for the Voices and Perspectives Not Represented at the Table

Several meeting participants emphasized the importance of taking stock of which voices are at the table and which voices are absent. One meeting participant stated, "We need more voice from the community, parents, and students. Even if at times the voices can be destructive, we need to find systematic ways to invite these voices to the table." Closely tied to the previous recommendation, such input can help decisionmakers anticipate the consequences of their decisions—intended and unintended—and adapt or abandon their efforts accordingly.

Sometimes, You Have to Say No

Building on observations from earlier in the meeting, participants acknowledged the importance of having a clear plan and associated priorities to create the conditions for coherence. While the opportunity for new state money to pursue yet new priorities and funding sources might be tempting, thought about how they fit or don't fit with current district policy and priorities is required. As one district leader explained, "Sometimes, you have to say no. Avoid the siren song of free money. Otherwise, you lose coherence quickly." Having the courage to decline financial resources that could undermine existing improvement efforts can better ensure consistency and alignment in the system. In the process, modeling decisions that are aligned to a district's overall vision and goals can reinforce the importance of establishing a culture of coherence in vision and goals.

Coherence Is Important, but It Is Important to Keep in Mind That the Ultimate Goal is Serving Students

One meeting participant emphasized that although coherence can help create the conditions for improved adult practice and student outcomes, it is a means to an end. Education leaders should instead think of coherence in service of meeting students' academic, physical, mental health, and social-emotional needs. The goal is to move the needle on student achievement markers; coherence can help to organize the work of a system in service of the goal of increased student performance.

Next Steps for the Collaborative

The Collaborative will meet next in May 2023 in Santa Ana Unified School District. In the meantime, Collaborative staff will continue to share key lessons and takeaways from our core meetings with the broader field of California educators. Resources from this meeting, as well as resources from previous meetings and updates regarding Collaborative members, are available at www.cacollaborative.org.