

Continuous improvement is a powerful engine for equity

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Inequities in education, health care, and other social services are often rooted in systemic challenges that organizations must work together to address. Working together requires accessible methods for organizations — including schools and school districts — to collaborate, develop shared goals, and coordinate efforts to drive systemic change.

Continuous improvement offers a tried-and-true framework

for organizational change and transformation. When paired with the power of networks to distribute leadership and spread change throughout and among organizations, continuous improvement becomes a powerful engine to drive systems improvement at scale.

Yet, if not done with a focus on advancing equity, improvement efforts risk reproducing or exacerbating inequities instead of eliminating them.

In response to this need, Shift, an organization committed to addressing society's most pressing inequities through continuous improvement, partnered with equity leaders, educational experts, and the Bill & Melinda Gates Foundation to design an improvement course, Improvement Methods for Equity (IM4E).

IM4E is designed to help education organizations create more equitable outcomes in their education

systems while learning and practicing foundational continuous improvement skills. In this article, we share important lessons and public resources to design programs that center on equity while building capacity for ongoing learning and improvement.

IM4E COURSE DESIGN

The Shift team designed IM4E as a team-based course for school districts and education intermediary organizations that provide direct support to schools. Our goal was for participants to learn valuable continuous improvement skills that they can apply in their organizations and networks to further educational equity.

We also wanted teams to explore examples of how these skills and capacities can be implemented in networks and develop the diverse leaders needed for improvement to continue long after course completion.

In December 2019, we selected 14 organizations to participate in the course based on several criteria, including the strength of their equity imperative or goal, their direct connection to middle and high school classrooms, their team members' roles and proximity to the work, and their vision for developing and using continuous improvement in their organizations. (See the list of organizations in the box at right.)

Organizational equity imperatives focused on improving the quality of education, especially for Black, Latinx, and low-income students. Imperatives ranged from important topics such as equitable enrollment in postsecondary programs, access to advanced and STEM programs, and student belonging and experience in class.

Like most programs in 2020, we took the original in-person design for IM4E and developed a fully virtual experience due to the ongoing uncertainty of the COVID-19 pandemic. We leaned into Shift's conviction to design *with* people, not *for* people, and convened the selected organizations to weigh options for this virtual experience.

We agreed that skills would be segmented into short, monthly workshops to minimize virtual time over the course of four months from October 2020 to January 2021. One of our biggest virtual design decisions was implementing a flipped classroom approach with brief asynchronous teaching before the synchronous interactions. This allowed us to shorten and focus workshops on application of new skills and discussion.

Shift developed eight videos — now available to the public on Shift's website — to teach core skills before workshops. A “challenge by choice” structure allowed teams to opt in to the skills most aligned and relevant to their

PARTICIPATING ORGANIZATIONS IN IM4E

- Newark Trust
- National 4-H Council
- Mid-Atlantic Equity Consortium
- Student Leadership Network
- Philadelphia Academies
- Internationals Network for Public Schools
- Broward School District
- Replications
- Communities in Schools – Eastern Pennsylvania
- Philadelphia Education Fund
- Pasco School District
- Educate Tomorrow
- TNTP: Denver
- Teaching Residents @Teaching College

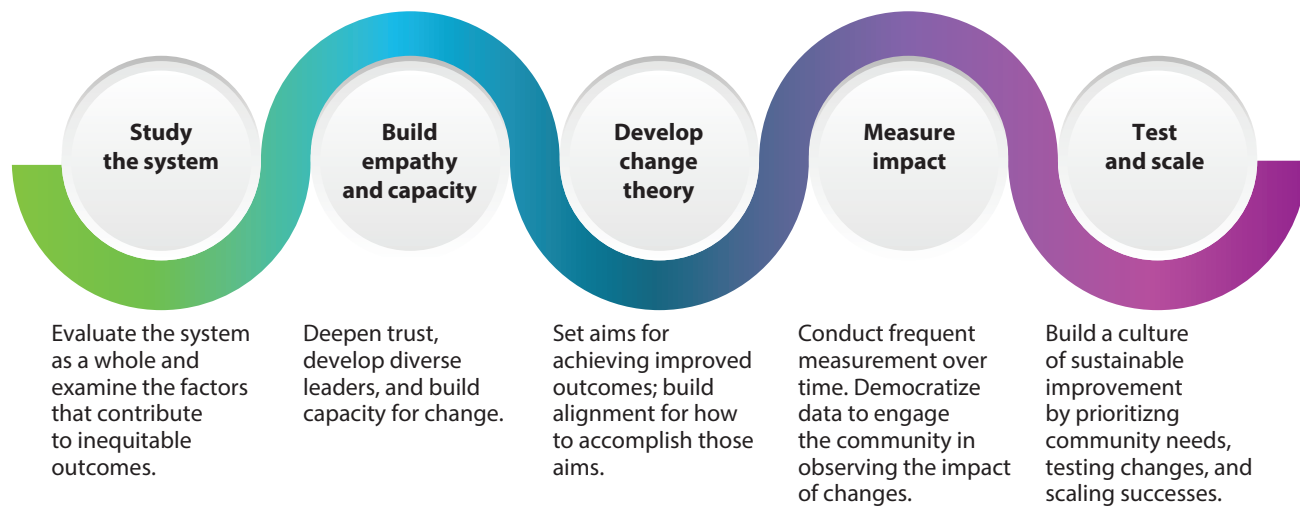
needs during the pandemic rather than being obligated to attend all workshops.

In addition to supporting application of continuous improvement skills, Shift coaches supported teams with optional one-to-one coaching outside of workshops to adapt to the new priorities born from remote and hybrid teaching structures. Shift created templates for each skill for teams to apply to their own projects with support from coaches.

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SHIFT APPROACH TO IMPROVEMENT:

How diverse teams with a shared purpose can accelerate learning and improve outcomes



SHIFT'S APPROACH TO IMPROVEMENT

We used Shift's approach to improvement (see figure above) to guide course content and help participants develop a balanced, introductory set of continuous improvement skills. This included a set of tools that can be used throughout the continuous improvement process (see table at right).

Shift believes that continuous improvement is nonlinear — meaning that organizations can start anywhere within the process to work toward change. This course reflects our commitment to finding the relevant entry points to build on organizational strengths while developing common language for improvement across teams. Building diverse approaches and deepening specific skills creates capacity for teams to draw on the right improvement skill at the right time.

To illustrate and practice the continuous improvement practices, we created a fictional case study — Shift Academy — that the participants discussed throughout the course. Since participating organizations had unique aims for improving educational equity, this provided a shared context and allowed for deep dialogues about how

IMPROVEMENT SKILLS AND RELATED TOOLS	
Improvement skills built in IM4E create capacity for teams to engage in the following processes and use the following tools. All of the tools can be found on Shift's website at www.shift-results.com/resources/tools	
Process	Tools
Study the system	<ul style="list-style-type: none"> Explore disaggregated data to identify high-impact root causes of system problems with a root cause analysis. Analyze and redesign inequitable systems and processes using process maps.
Build capacity and empathy	<ul style="list-style-type: none"> Unearth complexity by viewing an issue through the lens of multiple perspectives with Shift's perspective prism.
Develop change theory	<ul style="list-style-type: none"> Develop shared goals by establishing scaffolded aims, linked to long-term equity imperatives. Co-design change theory with a key driver diagram to coordinate and communicate change efforts.
Measure impact	<ul style="list-style-type: none"> Design a portfolio of accessible measures for learning and improvement. Learn from and interpret continuous data on run charts.
Test and scale	<ul style="list-style-type: none"> Run rapid cycles to test, adapt and implement changes with PDSA (plan, do, study, act) cycles.

to make systems-level changes without bringing in the unique complexity of each individual context.

The case centers on a well-documented and long-standing injustice in education: racial and gender inequities in discipline practices that

lead to Black, female students receiving disciplinary referrals at disproportionate rates compared to other student groups (BELE Network, 2020; Loubriel, 2016; Green, 2020).

Throughout the course, participants follow Shift Academy's journey and

apply each continuous improvement skill in their efforts to dismantle complex factors leading to inequitable practice and reduce the number of discipline referrals for Black female students.

RESULTS

One key principle of continuous improvement is that measurement is used for learning, not judgment. Accordingly, the Shift team tracked metrics from various data sources that were integrated into the IM4E course structure and that we will apply to future iterations of the course.

The most extensive data came from the pre- and post-course participant self-assessment of participants' continuous improvement knowledge and their organizations' continuous improvement infrastructure and capability.

We gave each organization a summary report that included the aggregate data across their team members. The findings from these reports continue to serve as a valuable tool for leaders aiming to build organizational improvement capacity.

Pre- and post-data, however, do not provide timely information to make course adjustments and improvements. Therefore, we supplemented this data with checks for understanding for each continuous improvement skill and polls to gauge participant satisfaction at the end of each workshop. We also tracked participation in each IM4E offering to assess interest in specific topics and accessibility of the course (e.g. timing, length, use of recordings).

The first finding was that attendance was high throughout the course, despite the challenges of the pandemic and the opt-in choice for each workshop. Two organizations decided to opt out of the virtual course because the pandemic caused too many staffing changes. Of the remaining 12 teams, 10 participated in every workshop while the other two missed one each but later accessed recordings.

High participation translated into

“This project deepened the connection between equity and continuous improvement,” said Rebecca Kelley, director of development, National 4-H Council.

growth in knowledge of continuous improvement skills. The pre- and post-course self-assessments showed statistically significant growth in eight of nine skill areas: Build empathy, set aims, create key driver diagrams, run PDSA cycles, track data, interpret variation, map processes, and analyze root causes with Pareto charts.

Participants also shared their qualitative feedback on the IM4E training, what skills they gained, and what sparked an aha moment. Garner Andrews, a former social studies teacher and team leader with Internationals Network who now teaches in Virginia, recalled a specific tool: the key driver diagram.

“When I learned about this tool, it just opened my eyes to what I felt was missing in past years of attempting to do student growth goals ... and what we've been doing slightly wrong,” he said. “We applied [the key driver diagram] at the end of the past school year, and it was one of the most productive conversations that we had as a leadership team.”

“I felt like I had a hammer, nail, and a couple of screwdrivers ... then, coming into IM4E, all the tools, templates, and videos, I felt like I walked into Home Depot,” said Jon Roure, executive VP & chief innovation officer at Student Leadership Network, an organization that supports young people growing up in diverse underserved communities to gain access to higher education and fulfill their dreams. “There were just so many more tools, so many more avenues available to me and my staff to figure out how we take this concept and put it into practice.”

We also found that IM4E created more consistent knowledge about continuous improvement across team members — an important step toward building organizational capacity.

Our biggest question was whether participants would apply newly developed continuous improvement skill sets to building equitable outcomes in their educational systems. We were excited to see that 81% of respondents agreed or strongly agreed that their team strengthened the integration of equity and continuous improvement in their work.

At the conclusion of IM4E — 10 months later — 84% of participants reported that they had already applied skills from IM4E to their work in other parts of their organizations. Participants shared specific examples of how continuous improvement practices are being used in service of equity.

“This project deepened the connection between equity and continuous improvement,” said Rebecca Kelley, director of development, National 4-H Council. “As an organization that was already committed to data-driven improvement, the team experience connected our way of doing continuous improvement to new partners at the school and district levels. This project is a model that has advanced our equity commitment.”

Other participants recognized the value of weaving equity and continuous improvement together in Shift's approach to improvement. “While we have been able to boast strong program outcomes for nearly two decades, this year is the first opportunity that we have had to receive technical assistance support in continuous improvement, conduct a root cause analysis, and develop equity-centered program interventions directly informed by our stakeholders' voices,” said Roure. “Often, diversity, equity, and inclusion are considered separately from continuous improvement, and we are motivated to learn more about IM4E's approach as we strengthen our

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organizational capacity in these areas.”

Finally, the importance of learning how to select the right tool from the toolbox was highlighted by Tonia Shook, a secondary program coordinator for the Office for Leading and Learning at Pasco County Schools, as the district worked to improve equitable access to 6th-grade advanced mathematics.

“We piloted our project at one school. In doing so, we were able to put 33 additional students — a whole class of students — in advanced mathematics,” Shook said. “What made us successful in getting those students in the courses — opening up a lifetime of opportunity — was that we began with the root cause analysis and figuring out why there is a lack of diversity in 8th grade, and it starts in 6th grade.”

WHAT WE LEARNED FROM IM4E

The participating school and organization leaders were not the only ones who learned from the IM4E experience. Our team from Shift and the Bill & Melinda Gates Foundation learned valuable lessons about designing a virtual course to build capacity to address the complexity of educational equity through continuous improvement.

First, high participation in IM4E — despite adverse conditions created by the pandemic — signals that there is strong demand among educational leaders for learning equity-centered improvement skills. Based on this learning, we will continue to grow and strengthen IM4E to provide more organizations and networks an opportunity to build equity-centered continuous improvement skills.

Second, the flipped classroom approach created an accessible entry point for participants, allowing participants to learn at their own pace and benefit from shorter, more applied synchronous sessions. Eight-minute videos provided introductory-level content to introduce the continuous improvement concept followed by a real-world example. We believe this

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approach helped build shared language across teams and greatly contributed to the reduced variation in continuous improvement knowledge across team members.

IM4E participants said that these videos also reduced the translational burden of sharing their learning with others in their organizations. Given the utility of these videos, Shift received funding from the Bill & Melinda Gates Foundation to create eight more videos focused on more advanced continuous improvement skills.

Third, a case study of a pressing equity problem provided a powerful bridge to develop and then apply skills. The design of IM4E created an intentional bridge to facilitate the transfer of learning to application. Participants learned continuous improvement skills with simple and accessible examples, then practiced through the complex and realistic Shift Academy case study, and finally applied the skills in their own complex contexts.

This intentional design helped span the gulf between simple learning examples and participant reality. We believe that this was a strong contributor to the majority of participants applying continuous improvement skills to areas of their organization by the end of IM4E.

Fourth, choice was a powerful motivator of and accelerant for learning. The challenge-by-choice and opt-in coaching structures allowed participants to select the topics and support most relevant and critical to their needs. While choice in learning is always a valuable approach to professional learning, it was especially

critical to the success of IM4E during the stress of the pandemic.

Working for justice and equity is complex and requires a commitment to deeper learning and reflection. We thank the IM4E community for going on this journey with us, especially during a pandemic. Their contributions and dedication will be vital to transforming learning experiences for young people.

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