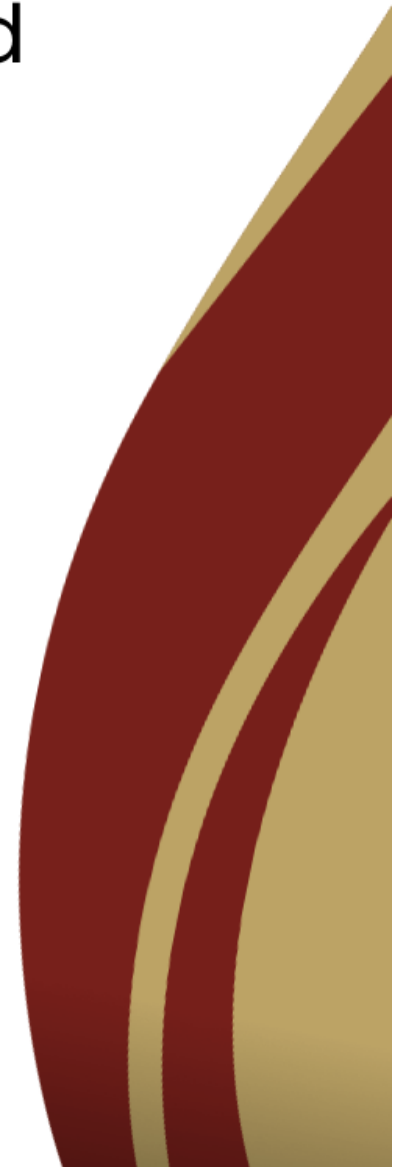


An Equity-Focused and Stakeholder-Inclusive Roadmap for **Superintendents' Entry Plans**

Improvement Project Members
Danielle Coughlin
Elizabeth McDaniel
Beth Rice



Executive Summary

Partner Organization



Services & Consultancy Teams

Primary Services

- 1 Research & Analysis
- 2 Advising & Planning
- 3 Implementation Support

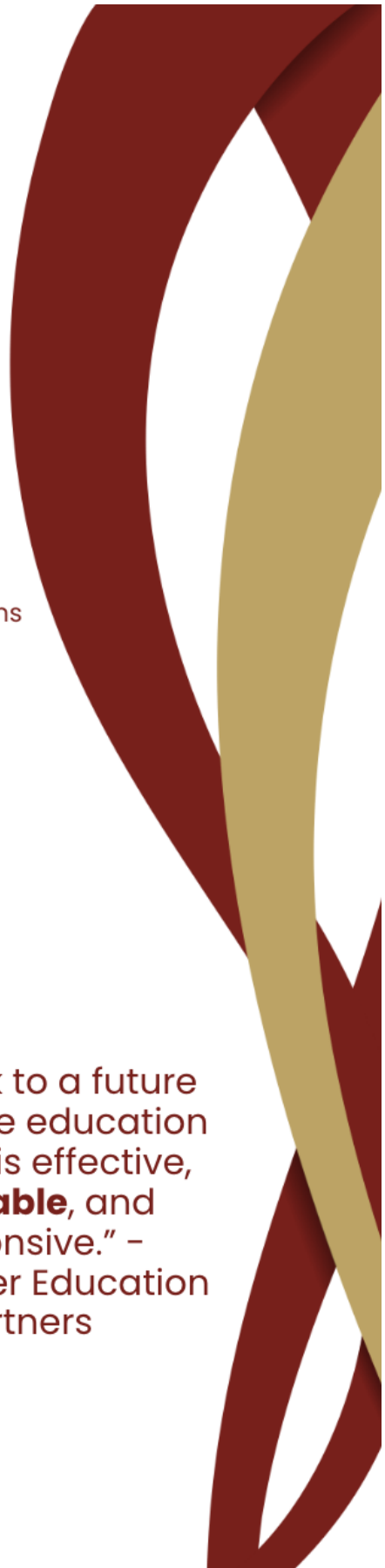
Consultancy Teams

- Policy & Evaluation
- Strategic Advising

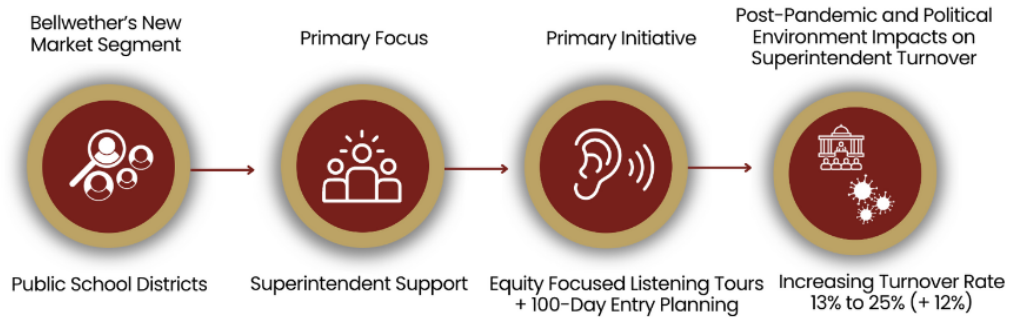
Impact

- 1 600+ Partnerships
- 2 Public & Private Education Partnerships
- 3 Non-Profit Organizations & Funding Partners
- 4 National Media Coverage as Field Experts

“We look to a future where the education system is effective, **equitable**, and responsive.” – Bellwether Education Partners



Problem of Practice



The COVID-19 pandemic created once-in-a-lifetime challenges for superintendents across the United States, leading to increased turnover (Sawchuk, 2021).



Project Questions

Primary Project Question

What **support elements** are necessary for **newly appointed superintendents** to ensure the **inclusion of stakeholder voice** within **100-day entry plans** in alignment with **Bellwether's mission and organizational capacity**?

Supporting Project Questions

Bellwether's Affordances & Constraints



Superintendents' Needs

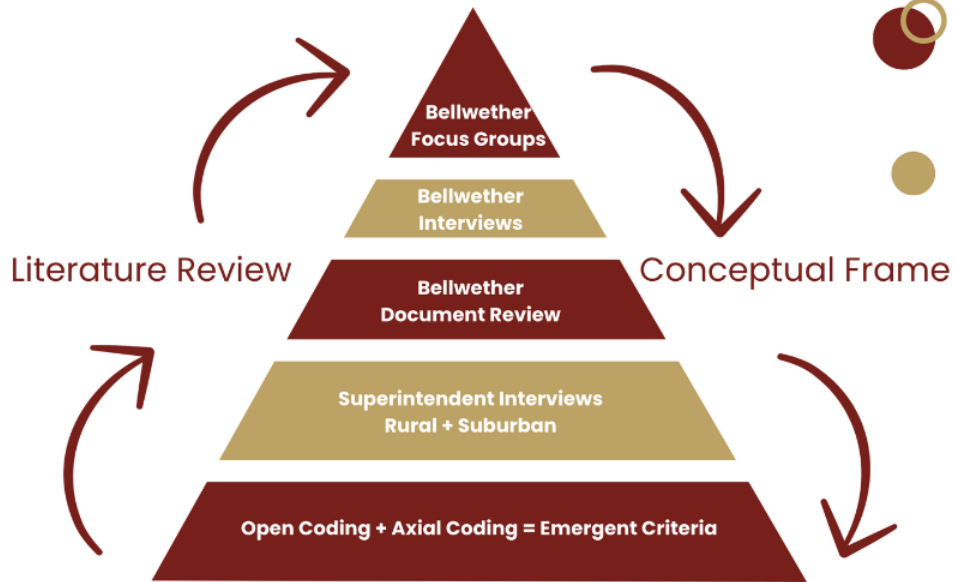
Return on Investment for District



Equitable Listening Tours & 100-Day Entry Plans

Project Design

Data Collection & Analysis Process



Sequential Design + Multi-Methods + Triangulation

Project Sample

Bellwether Interviews

Purposive Sample
Representative of
Both Organizational
Teams

Superintendent Interviews

Snowball Sample
Representative of
Rural and Suburban
Districts

Document Sample

Alignment with
Improvement Project
Supporting
Question 1



Four Key Findings

Project Support Question 1

Key Finding 1: Bellwether's **affordances align** with developing a **consultancy model/marketing pitch** to **support superintendents' entry**. These affordances include experience supporting complex organizations, a strong foundation of methodological research and improvement implementation, application of equity commitments, education insider-consulting staff, and expertise utilizing district staff as a partner on project teams.



Project Support Question 2

Key Finding 2: Superintendents' needs vary based on regional factors; however, **the district's size showed a more significant impact on need**, particularly available research and development/communication departments. Additional attributes that lead to a variation of need included superintendent identities (e.g., district insider/outsider), individual background experiences and skills, and access to support networks.



Project Support Question 3

Key Finding 3: **Investing in training** costs to promote superintendent retention **has a higher non-financial and financial return on investment** when **compared to the adverse effects of superintendent turnover**. This return on investment is a **critical lever** for highlighting the **value** of training and support, a necessary aspect of receiving **school board endorsement**.



Project Support Question 4

Key Finding 4: The equitable inclusion of stakeholder voice into superintendents' listening tours and 100-day entry plans occurs through the **intentional incorporation of diversity, equity, and inclusion** into the **planning, implementation, and tools of the support**.



Recommendations

Key Finding 1

Bellwether should **leverage an alignment of its mission and affordances** with the **needs of district partners** to successfully engage in equitable listening tours and stakeholder-inclusive entry plans.



Key Finding 2

Bellwether will need to **contextualize the district** by collecting and analyzing district information such as the political landscape, strategic goals, district history/stories, and publicly available data such as student achievement and discipline/attendance.

We recommend that Bellwether partner with Superintendent Associations or leverage their district partnerships to **create an internal network of support/mentorship**. These networks serve as a **low-cost service-add**, supporting retention and ensuring that Bellwether has an **enduring impact** beyond their initial partnership.



Recommendations

Key Finding 3

Phase 1 partnerships target recruitment firms and school boards, and Bellwether support includes equity-focused and stakeholder-inclusive listening tours.

Phase 2 partnerships target the superintendent, and Bellwether support includes disaggregating listening tour data to revise and implement 100-day entry plans.

Key Finding 4

Bellwether should support partners in eliminating barriers through **location selection** for listening tours **aimed at inclusion**, ensuring accessibility, and limiting transportation challenges.

Listening tour socials **provide two functions**:

- **Sensemaking** - to gather stakeholder voices for inclusion within entry plans.
- **Sensegiving** - to present themselves and their goals and vision for the district.

We recommend Bellwether utilize the Cultural and Language Mapping Tool to **create an understanding of the political context**, including points of political resistance, the demographic make-up of the community served, and comfortable/commonly used language aligned to diversity, equity, and inclusion or alternative words (e.g., representation, access, and opportunity).



10-Step Roadmap for Bellwether's Consultancy Model and Marketing Pitch



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ABSTRACT

Bellwether, a national non-profit organization, develops equitable education systems and lifelong opportunities for marginalized youth. Bellwether aims to support district superintendents as a new market segment through equitable stakeholder listening tours and 100-day entry planning. Due to the impacts of post-pandemic and political polarization on superintendent turnover and the importance of consistent leadership to carry out district goals, this support is an urgent need.

The primary project question was: What support elements are necessary for newly appointed superintendents to ensure the inclusion of stakeholder voice within 100-day entry plans in alignment with Bellwether's mission and organizational capacity?

A mixed-methods and sequential project design included two Bellwether focus groups, a document review and analysis, and interviews with Bellwether's support teams and district superintendents. Data triangulation occurred through a reflective alignment to the project's questions, conceptual framework, literature review, and emergent criteria from coded interview data.

The improvement project's key findings were:

- Bellwether's affordances align with developing a consultancy model/marketing pitch to support superintendents' entry. These affordances include experience supporting complex organizations, a strong foundation of methodological research and improvement implementation, application of equity commitments, education insider-consulting staff, and expertise utilizing district staff as a partner on project teams.
- Superintendents' needs vary based on regional factors; however, the district's size showed a more significant impact on need, particularly available research and development/communication departments. Additional attributes that lead to a variation of need

included superintendent identities (e.g., district insider/outsider), individual background experiences and skills, and access to support networks.

- Investing in training costs to promote superintendent retention has a higher non-financial and financial return on investment when compared to the adverse effects of superintendent turnover. This return on investment is a critical lever for highlighting the value of training and support, a necessary aspect of receiving school board endorsement.
- The equitable inclusion of stakeholder voice into superintendents' listening tours and 100-day entry plans occurs through the intentional incorporation of diversity, equity, and inclusion into the planning, implementation, and tools of the support.

We recommend a 10-step roadmap for Bellwether's development of a consultancy model and marketing pitch to support district partnerships.

Keywords: Superintendents, Entry-Planning, Listening Tours, Stakeholder Voice, Diversity, Equity, Inclusion, Superintendent Turnover

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POSITIONALITY

Danielle Coughlin

Danielle Coughlin earned a Bachelor of Science in Education from Radford University, and a Master of Education with a focus in gifted education from William & Mary. She is a doctoral candidate at Vanderbilt University's Peabody College. She has spent her career in public education. She entered the

profession as an elementary school teacher and then became an instructional coach. Having served exclusively in Title One schools, Danielle is passionate about the inequities her students experienced as a result of systemic shortcomings. As a result of her advocacy for her school and learners, Danielle was elected as the youngest board member of the local chapter of the National Education Association. In 2019, Danielle served on the planning committee for Virginia Beach Public School's strategic framework. These experiences highlighted the value of stakeholder voice and the need for its inclusion in strategic planning.

Elizabeth McDaniel

Elizabeth McDaniel earned a Bachelor of Arts, majoring in political science and minoring in philosophy and sociology, and a Master of Business Administration from the University of Miami. She is a doctoral candidate at Vanderbilt University's Peabody College. Elizabeth began her career as a public school teacher in elementary and intermediate school classrooms. In 2006, she founded a project-based learning school in a rural community, educating students in one of Florida's economic enterprise zones. In 2011, the school expanded to a suburban community in Southwest Florida. Currently, she serves as the Head of School for both campuses, leading a staff of forty educators.

Additionally, she has served on the board of directors for the Early Learning Coalition of Southwest Florida and as a national America Achieves Teacher and Principal Fellow. She is currently a member of the Curriculum and Advisory Committee for Lee County Public Schools, an advisory committee to the school board.

Beth Rice

Beth Rice grew up in western North Carolina and graduated from UNC-Chapel Hill with a Bachelor of Science in Psychology. She returned to western North Carolina as a special education teacher and then completed her Specialist Degree in School Psychology at Appalachian State University. She is a

doctoral candidate at Vanderbilt University's Peabody College. Beth's first passion is learning through teaching, as relationships matter and are at the heart of her work.

From these early experiences, Beth is a child advocate and promotes systems change to meet underserved students. Beth lived systems change through scaling up a Multi-Tiered System of Support (MTSS) framework at the school, district, regional, and state levels, including serving on the State MTSS Team for nearly a decade. Additional focus areas include school mental health and state policy, secondary MTSS implementation, implementation science, technical assistance, and coaching frameworks. Beth served as the State Education Agency Social and Emotional Learning Lead (SEL) for three years and currently supports three state education departments through the Region 6 Comprehensive Center and the SERVE Center at UNC-Greensboro. As a part of this work, Beth leads Alternative Education in North Carolina.

Finally, Beth believes in the power of state associations and grassroots organizing. She served as the Secretary, President-Elect, and President of the North Carolina School Psychology Association (NCSPA). Most recently, she co-founded SEL4NC, a grassroots organization elevating equity-focused social-emotional learning.

INTRODUCTION TO BELLWETHER EDUCATION PARTNERS

1.1 Organizational Mission, Values, and Impact

Bellwether Education Partners ("Bellwether"), a national non-profit organization founded in 2010, focuses on developing equitable education systems and lifelong opportunities for marginalized youth. Bellwether has established itself as a trusted and reliable local, state, and national education consultancy organization. Bellwether's client portfolio includes 600+ partnerships, ranging from individual schools, charter school networks, state departments of education, and non-profit organizations such as the Bill and Melinda Gates Foundation.

As a credible voice in the education field, Bellwether is a regular contributor to national news outlets and academic publications. Bellwether's associates advise state and national leaders in education policy. Bellwether's recent series, *Splitting the Bill: A Bellwether Series on Education Finance Equity*, provided a succinct course on education finance, including the key questions leaders should ask to drive equitable outcomes for their state and communities (Dammu et al., 2023).


Bellwether aims to shape the national narrative on transformative education through published research findings and consultancy partnerships. Bellwether tailors their support to meet client needs while being driven by seven core values: mission mindset, tailored excellence, synergy, integrity, flexibility, candor with care, and diversity, equity, and inclusion. In partnership with Bellwether, The Urban Institute and Stand Together Trust led Bellwether to facilitate a national study that highlighted the gerrymandering of school districts and the inequity upheld within the public school system. This partnership enabled ongoing advocacy for equity in public schools.

Bellwether's Equity Commitments ground its organizational values. These commitments align to diversity, equity, and inclusion and are lived throughout their organizational work, spanning research practices and policy impact. Within the evaluation wing of their organization, their equity commitments included a commitment to "identify and interrupt bias" (Bellwether, 2022). After reviewing school structures and policies in 50 states, Washington, D.C., and Puerto Rico, researchers identified and published a study entitled *Double Punished: Locked Out of Opportunity*, highlighting the inequity of education access in juvenile justice education (Beach et al., 2022). Within their strategic planning, Bellwether is committed to "inclusive methods and approaches" (Bellwether, 2022). Their practice of partnership utilizes existing planning and implementation efforts to deliver data-based insights to advance educational equity while driving their partner organization's goals forward (Bellwether, 2023).

There are six focus areas of Bellwether’s work, including coherent support, diverse learning options, evidence-based policies, lifelong learning, responsive systems, and strong leaders. Bellwether demonstrates the work of supporting strong leaders and evidence-based policies in their consultancy model and program evaluation through various partnerships, such as the project with Rocketship Education Wisconsin Unleashing Potential Full-Service Community Schools Program. A series of research questions guided a quasi-experimental mixed methods evaluation, including an analysis of documents and interviews with key organizational stakeholders. One of the goals included elevating the power of families and community members to vocalize needs.

Figure 1

Bellwether Education Partners - Seven Core Values and Six Focus Areas

Bellwether Education Partners	
Seven Core Values	Six Focus Areas
Mission Mindset	Coherent Supports ←
→ Tailored Excellence	Diverse Learning Options
→ Synergy	Evidence-Based Policies
Integrity	Lifelong Learning
Flexibility	Responsive Systems ←
Candor with Care	Strong Leaders ←
→ Diversity, Equity, and Inclusion	Citation: www.bellwether.org 
Improvement Project Focus ←	

Bellwether's impact is present throughout the education field, with its commitment to diversity, equity, and inclusion as its foundation. The organization is uniquely equipped to expand its service model offerings to support incoming superintendents of public schools, engaging and integrating stakeholder voices in their entry planning to drive equitable outcomes for school districts.

Figure 2

Bellwether's Impact

Bellwether's Impact



1.2 Organizational Structure

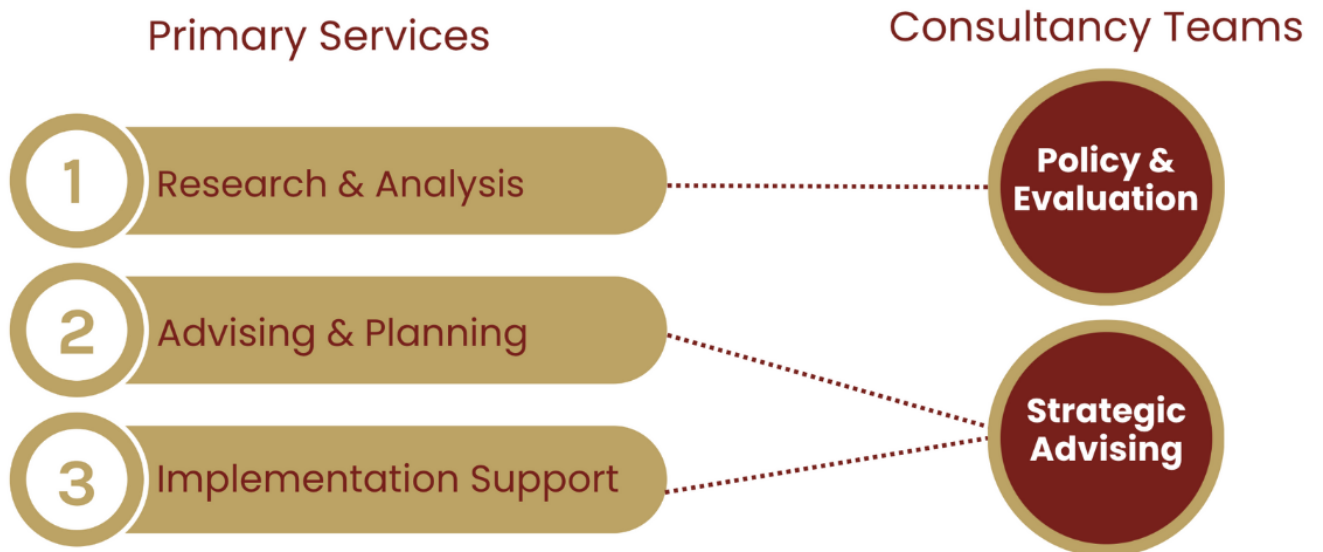
Bellwether's team consists of bifurcated experts in educational research and business and policy consultancy. Their typical distribution of team members has historically served different needs during partnerships. One team leads research with a rich background of methodological experience. The second

team supports practitioners with advising and planning. Bellwether’s consultancy work is consistently rooted in operationalizing organizational missions and stakeholder voices for equitable impact and implementation through strategic business planning.

Figure 3

Bellwether’s Primary Services and Consultancy Teams

Services & Consultancy Teams



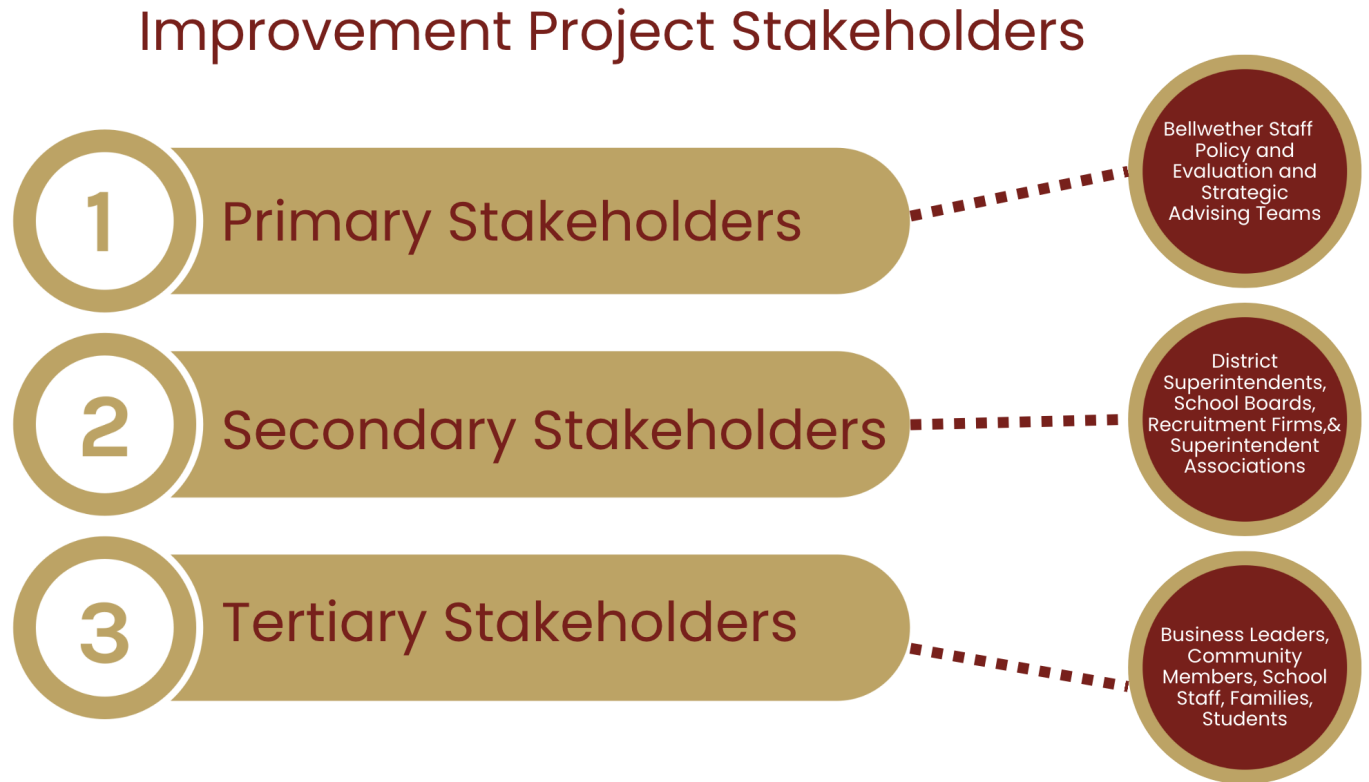
1.3 Project Stakeholders

Currently, Bellwether does not provide support services to incoming superintendents. This support would require a collaborative effort between the Policy and Evaluation and Strategic Advising Teams, a new service delivery method that fully leverages their internal staff. By working with incoming superintendents, Bellwether will acquire new network partners, including state school board associations, district school boards, recruitment firms, business leaders, school staff, and diverse community members.

Bellwether recognizes the importance of these stakeholder groups in developing strong leaders as a critical component driving equitable opportunities for districts, schools, and students. This improvement project aims to provide Bellwether with an initial exploration into the superintendent market segment, explicitly targeting the inclusion of stakeholder voices within newly appointed superintendents' 100-day entry plans. Providing this consultation meets Bellwether's goal of expanding its service delivery. The primary stakeholders for the project are Bellwether's staff, including the Policy and Evaluation and Strategic Advising teams. Secondary stakeholders are district superintendents, school boards, recruitment firms, and superintendent associations. Tertiary stakeholders encompass business leaders, diverse community members, school staff, families, and students.

Figure 4

Improvement Project Stakeholders



1.4 Use of Project

The improvement project focused on superintendents within the Southeast region of the United States, narrowing the scope to understand regional superintendent needs for Bellwether's customized support model. The primary value of this project is to provide research-based and stakeholder-informed data surrounding the needs of newly incoming superintendents within rural, suburban, and urban districts. Illuminating support needs will result in recommendations to support the creation of a consultancy model and marketing pitch decks, including suggestions for data collection and communication tools, high-quality aspects of listening tours and entry planning, and avenues of funding for superintendent entry support. Specifically, this project will inform Bellwether of regionally specific needs to support newly appointed superintendents by equitably engaging in stakeholder listening tours, disaggregating and sensemaking of stakeholder voice and district-wide data, and modifying entry planning.

Bellwether can then utilize the findings and recommendations to create a superintendent service model in alignment with its organizational mission and commitments. Ultimately, the research-based and stakeholder-informed model will lead to marketing pitch decks. Bellwether will create and utilize the marketing tool to garner partnerships with public school districts.

Observing the findings and applying the recommendations from this improvement project through a 10-step roadmap will enable equitable district planning inclusive of stakeholder voice. Leadership support is timely within the complex public education environment where superintendent turnover has increased, negatively impacting equitable student achievement. Stakeholder voice and its incorporation into superintendent entry planning aims to attend to the complex environment by building trust, unifying districts, and enabling superintendents to carry out responsive and collective goals for

equitable student achievement. Ultimately, these practices aim to support superintendent retention and longevity within the districts they serve.

PROBLEM OF PRACTICE

2.1 Bellwether Organization's New Market Segment Goals

Bellwether aims to expand its service offerings through the direct support of incoming superintendents, specifically during their first 100 days, moving from listening tours to integrating stakeholder voices within equity-focused strategic planning documents and subsequent implementation. This project will support Bellwether's Policy and Evaluation and Strategic Advising Teams by providing findings and recommendations to assist with developing the strategy to both pitch and deliver the support model to garner public school partnerships. Specifically, they aim to establish the new client segment by aligning organizational feasibility factors and identifying the superintendents' wants/needs, thereby bridging the support of stakeholder voices to equitable entry planning and implementation within the politically polarized field of public education.

The problem of practice relates to the organization's core values and focus areas, including equitable and responsive systems and strong leaders and schools. The problem is vital as district-level policies and implementation plans drive the work occurring in schools, which impacts school leaders, teachers, and students. Failing to address the problem risks the exclusion of stakeholder voice and engagement within district implementation plans and equitable student achievement.

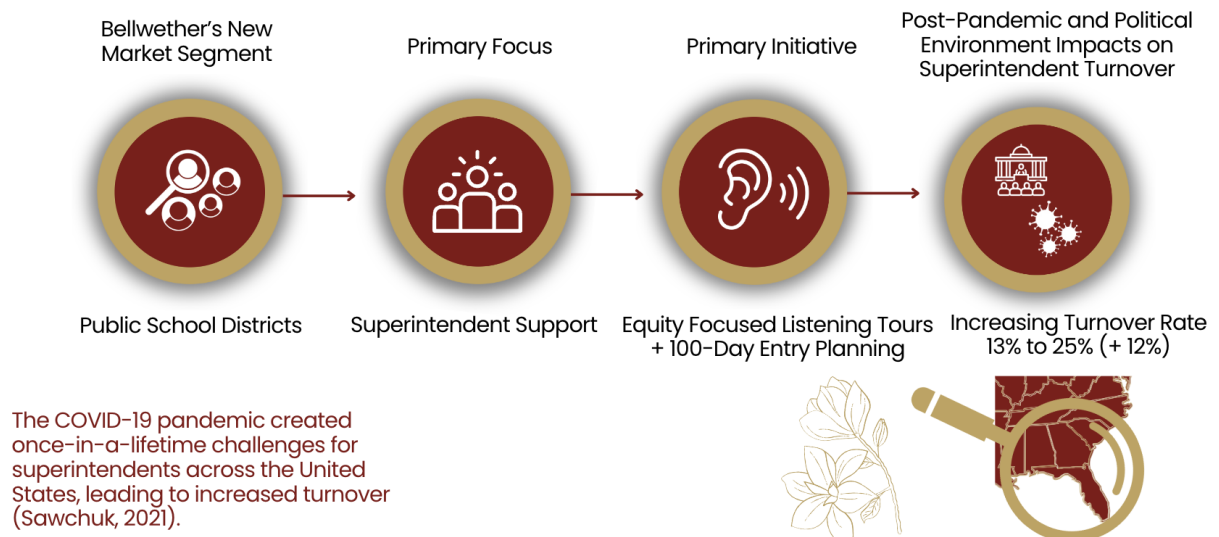
Further, as superintendent turnover correlates with political tension with school boards and contradiction with the community, this service is not only a marketable return on investment, but it will also offer numerous benefits for districts in partnership with Bellwether. Given Bellwether's desire to develop a customized consultancy model, research will examine the current climate and inputs impacting public education and school districts with their strategic planning processes. As the service is

novel and contingent upon this partnership, existing research within the organization does not yet exist. The literature review affords information about the integration of stakeholder voice but is not specific to the K-12 educational setting. Methodologies of acquiring stakeholders' voices is a clear area of research; however, the challenge of integration strategies centered through equity is less known and is a focus throughout the improvement project.

Figure 5

Problem of Practice

Problem of Practice



2.2 Broader Societal Connection

The problem of practice connects to the broader field, as end-user voice is a crucial component of representative stakeholder engagement. It aligns with Bellwether's focus areas of strong school leaders, coherent supports, and responsive systems. Representing and understanding all voices is connected to teacher engagement and positive student outcomes (Clarke, 2020). District strategic plans and policies drive the daily work carried out by schools. As an incoming superintendent, building relationships and communicating narratives will be foundational to the success of their newly

established partnership. A successful partnership between the superintendent and the community he or she serves will correlate with improved learner outcomes (Clarke, 2020).

Currently, Bellwether is looking for research-based practices and data collection of end-user perspectives to inform its consultancy model and marketing pitch deck for customized superintendent support. They envision “ride-along” listening tours that transform into actionable steps for entry plan implementation within school districts. Implementation support includes the immediate and responsive communication of stakeholder feedback findings, incorporating end-user voice within the 100-day entry planning goals, and, ultimately, action steps to incorporate the goals into the district and school’s daily work.

2.2.1 Superintendent Turnover

Within the United States, the increasing political disagreements and the COVID-19 pandemic have created significant stress and tensions within schools and districts. Examples include book banning, prohibiting curriculum content surrounding LGBTQ+ communities, critical race theory, and health safety. According to a Center on Reinventing Public Education and RAND Corporation report published in February 2023, school leaders and teachers participated in a survey pre and post-COVID-19 pandemic regarding whether the stress and disappointment of their positions were worth it. Before the pandemic, 84% of principals and 75% of teachers responded “yes”; after the pandemic, 60% of principals and 44% of teachers responded “yes” (Jochim et al., 2023). Therefore, these significant declines in work morale indicate additional challenges for incoming superintendents. Superintendent challenges lead to broader public school system challenges, as leadership turnover is costly and stalls the implementation of district-wide strategic plans.

2.3 Justification for Problem of Practice

Given the challenges mentioned above, this is a timely problem of practice for Bellwether to explore; supporting incoming superintendents through coherent support, such as collaborative decision-making and open communication channels, is vital to achieving high-quality school districts (Clarke, 2020). Ultimately, this impacts strategic entry plans aimed at Bellwether’s focus area of responsive systems, strong leaders, tailored excellence, and diversity, equity, and inclusion. It is imperative that organizations like Bellwether support district leaders by incorporating stakeholder voices within their strategic plans to ensure comprehensive and inclusive community buy-in and retention within the education profession.

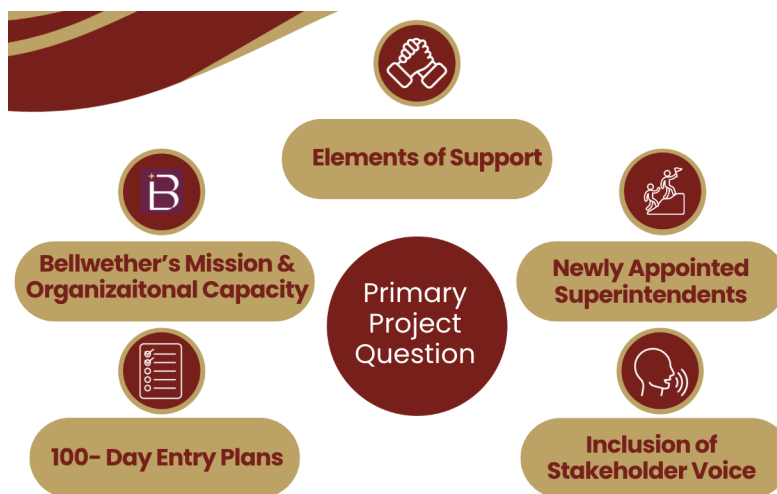
PROJECT QUESTIONS

Primary Project Question:

What support elements are necessary for newly appointed superintendents to ensure the inclusion of stakeholder voice within 100-day entry plans in alignment with Bellwether’s mission and organizational capacity?

Figure 6

Primary Project Question Keywords



Supporting Question 1:

To what extent do Bellwether’s organizational mission, affordances, and constraints support the development of a consultancy model/marketing pitch to support superintendents with 100-day entry plans?

Supporting Question 2:

In what ways do superintendents’ needs for the inclusion of stakeholder voices vary based on rural, suburban, or urban school districts or size within the southeast region?

Supporting Question 3:

To what degree do school districts, in a potential partnership with Bellwether, find a return on investment with regard to superintendent training and support for the inclusion of stakeholder voices into 100-day entry plans?

- What financial resources for leadership training exist within rural, suburban, and urban school districts as a market segment for Bellwether?

Supporting Question 4:

In what ways are stakeholder voices equitably incorporated into superintendents’ listening tours and 100-day entry plans?

Figure 7

Supporting Project Questions Keywords



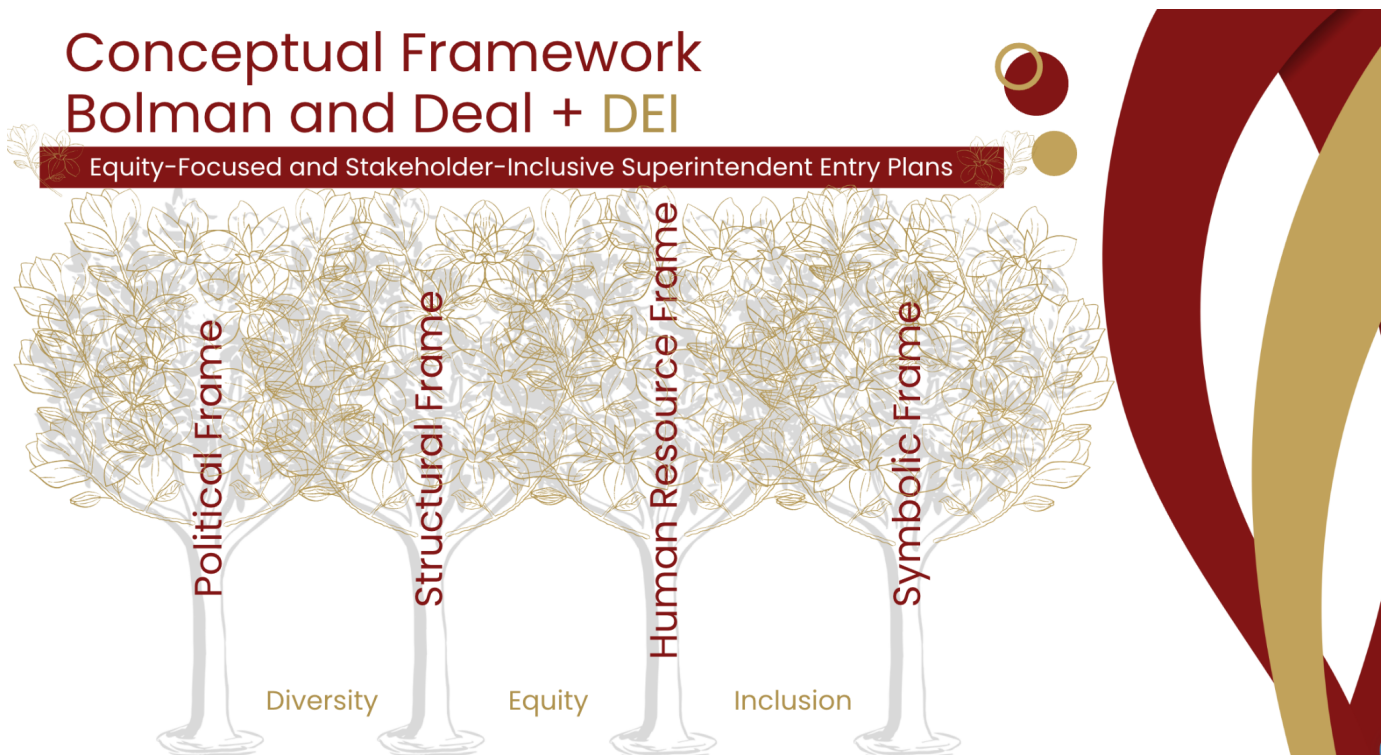
CONCEPTUAL FRAMEWORK

4.1 Symbolic Representation

The improvement project, in partnership with Bellwether Education Partners, focused on superintendent support for entry planning within the Southeastern region of the United States. The Southern Magnolia tree is the imagery for the project’s conceptual framework. The Southern Magnolia symbolizes resilience, fortitude, and longevity, necessary tenets of the work within public school leadership. Diversity, equity, and inclusion serve as the soil, the source of life. The trunks of the Magnolia tree represent Bolman and Deal’s Four Organizational Frames. Equity-Focused and Stakeholder-Inclusive Superintendent Entry Plans bloom as Magnolia flowers through the growth of the four frames from the foundation of diversity, equity, and inclusion.

Figure 8

Conceptual Framework



4.2 Diversity, Equity, and Inclusion

The improvement project defined diversity, equity, and inclusion aimed at project data reliability:

Diversity - varied traits and perspectives in the educational context.

Equity- fairness and equal access in the educational context.

Inclusion - valuing and involving all stakeholders in the educational context.

During interviews with Bellwether's support team staff and superintendents, an individual understanding of these concepts and terms was asked. The goal of these interview questions was to assess the existence of a shared understanding of the terms, thereby ensuring interview data reliability.

4.3 Bolman and Deal Four Frames

Bolman and Deal's Four Organizational Frames (2017) provide a structure to consider the multifaceted support of superintendents necessary to drive change within each frame: political, structural, human resource, and symbolic. However, Bolman and Deal's four frames (2017) neglect to address diversity, equity, and inclusion specifically. Inherently, diversity, equity, and inclusion, in best practice, would be the foundation from which each of the four frames grow. In other words, if Bolman and Deal's four frames are the structure for the work, diversity, equity, and inclusion serve as the sustaining foundation.

This framework is appropriate as Bellwether aims to support superintendents through entry planning to drive organizational change. The foundation of DEI honors the primary goal of that change, driven by equitable stakeholder engagement, in alignment with Bellwether's organizational equity commitments. Within the four frames, supported by the foundation of DEI, are other research-driven terms, strategies, and leadership theories, as defined below:

Political Frame

The jungle serves as a metaphor for the political frame within Bolman and Deal's (2017) framework for understanding organizations. The jungle represents the arena of conflict for competition over resources, power, and influence. Bolman and Deal posit that power and conflict are central to organizational decision-making. Recognizing power dynamics, coalitions, and political maneuvering are essential for driving outcomes.

- *Distributive Leadership Theory* - decentralized authority, leadership roles, and decision-making shared amongst diverse stakeholders to foster collaboration and the utilization of expertise. (Stauffer, 2019)
- *Servant Leadership Theory* - the leader aims to serve and empower diverse stakeholders through supporting and prioritizing the collective goals and the team's development. (Greenleaf, 2005; Halaychik, 2014)
- *District-Level Power Relations* - power dynamics among diverse stakeholders (superintendents, school boards, community groups, principals, teachers, parents, students), which shape decision-making, resource allocation, and policy implementation and influence education quality through collaborative interactions and balanced authority distribution.
- *Education Political Landscape* - the current context and political landscape of education, influenced by socio-political topics, geography, and local context (political climate, national, state, and local issues, funding, curriculum, teacher salaries, working conditions, school choice, access to education, accountability).

Structural Frame

Bolman and Deal (2017) posit that structures are “designed to suit an organization’s environment and technology” (p. 17). Symbolized by a machine, Bolman and Deal’s structural frame envisions organizations as a defined system. Defined roles, tasks, procedures, and hierarchies enable an efficient and effective organization (Bolman & Deal, 2017). Through the structuring of these roles, responsibilities, and procedures, an organization can accommodate its members to achieve the shared goals of the organization.

- *100-Day Entry Plans* - an initial plan for an incoming leader constructed from multiple data sources and collection phases for organizational goal implementation, strategies, and communication to diverse stakeholder groups.
- *Organizational Capacity* - the ability of the organization to meet goals within their afforded resources (human capital, time, and budget).
- *Organizational Infrastructure* - the capacity of the organization to meet structural foundations, including communication, technology, and research and development that drive goal implementation.
- *Pitch Decks* - a visual marketing tool communicating the value proposition of a strategic partnership between an organization and a new client market segment.

Human Resource Frame

The human resource frame takes its roots in psychology and views the organization as individuals, each with needs, prejudices, and limitations (Bolman & Deal, 2017). Symbolized as a community, the organization aims to accomplish its goals while promoting solid morale for the individuals, their work, and the organization (Bolman & Deal, 2017). The human resource frame

encourages supportive continuous learning, interpersonal relationships, and the empowerment of its organizational members (Bolman & Deal, 2017).

- *Culture of Care Theory* - an organizational environment that fosters the empathy and support of its stakeholders, placing value on the carer and cared-for (McCrary, 2019).
- *Stakeholder Training* - workforce development aimed at organizational mission and goals.
- *Stakeholder Voice* - the inclusive engagement of diverse individuals/groups to communicate perspectives, needs, and concerns that inform decisions, foster accountability, and acknowledge positionality.
- *Trust Building* - developing reliability, credibility, and confidence among individuals or groups through open communication and mutual respect, thereby enabling effective collaboration.

Symbolic Frame

Bolman and Deal (2017) liken the symbolic frame to theater; the audience forms an impression from what they see. The symbolic frame draws upon social and cultural anthropology and depicts organizations as cultures shaped by stories, history, myths, and ceremonies rather than the more tangible rules, policies, and authority (Bolman & Deal, 2017). The symbolic frame emphasizes organizational climate and culture as a powerful current shaping the organization.

- *Organizational Storytelling and Symbols* - defining organizational and community values and mission through narratives, shared knowledge, experiences, and symbols.
- *Learning Organization* - an organization that uses a human-centered and iterative improvement process to accomplish goals, where the leader serves as a designer, steward, and teacher.

- *Cultural Climate* - the attitudes, values, and behaviors that collectively shape the social environment within the school system.
- *Story of Self, Us, Now* - A value-driven strategy that utilizes emotion to inspire collaborative action, achieved by narrating one's genuine story and motivations. This strategy involves sharing the narrative of a community to showcase shared strength and purpose while outlining the necessary actions for an organization to enact positive change (Cheatham et al., 2022).

Table 1

Conceptual Framework - Alignment to Educational Context

Equity-Focused and Stakeholder-Inclusive Superintendent Entry Plans			
Political Frame	Structural Frame	Human Resource Frame	Symbolic Frame
Distributive Leadership Theory	100-Day Entry Plans	Culture of Care Theory	Organizational Story-telling and Symbols
Servant Leadership Theory	Listening Tours	Stakeholder Training	Learning Organizations
District-Level Power Relations	Organizational Capacity	Stakeholder Voice	Cultural Climate
Educational Political Landscape	Organizational Infrastructure	Trust Building	Story of Self, Us, Now
Diversity, Equity, and Inclusion			

LITERATURE REVIEW

5.1 Sources and Rationale

The literature review utilized The Jean and Alexander Heard Libraries at Vanderbilt University and Google Scholar, and superintendent recommended practitioner books related to the field. The citations within the books served as further sources of information and analysis.

Table 2

Literature Review and Project Citation Reference Table - Source and Quantity

Article Type	Quantity
Books	7
Peer-Reviewed Articles	12
Dissertations	12
Op-eds	5
Education Journal Websites	13
Toolkits, Guides, and Reports	16
Total Resources	65

The literature review began following two focus groups with the partner organization. The initial goal was to understand the current context of public education within the United States and how stakeholder listening tours and entry plans were defined as they related to a superintendent's entry into a district.

Thereafter, the literature review focused on the project's primary question and three supporting questions. Keywords bound the literature review. The primary keywords included stakeholder engagement in public schools, the connection of stakeholder voice and equity, and 100-day entry planning. Secondary project question keywords included methodologies of stakeholder listening tours, superintendents' needs by geography, the value-added/equitable foundation of listening tours, and the non-financial and financial return on investment of superintendent support, and superintendent turnover.

5.2 Organizing Themes and Research Synthesis

Following the literature review, organizing themes emerged through a literature synthesis. The organizing themes are listed below in Figure 9.

Figure 9

Literature Review Organizing Themes



Table 3*Literature Review Frequency of Organizing Themes*

Organizing Themes	Frequency within Literature	Year of Publication Range (2001–2023)
Current Public School Context and Climate	17	2017 (2), 2018 (1), 2020 (1), 2021 (1), 2022 (1), 2023 (11)
Organizational Relationships	7	2004 (1), 2006 (1), 2020 (2), 2022 (1), 2023 (2)
Entry Planning	33	2004 (1), 2005 (3), 2007 (1), 2008 (1), 2011 (1), 2012 (2), 2014 (2), 2015 (1), 2017 (4), 2018 (3), 2020 (3), 2021 (1), 2022 (4), 2023 (5), nd (1)
Public School Stakeholders, Listening Tours	10	2005 (1) 2012 (1), 2017 (1), 2020 (3), 2022 (1), 2023 (2), nd (1)
Superintendent Needs by Region and Size	7	2001 (1), 2018 (1), 2020 (2), 2022 (1), 2023 (2)
District Funding Sources and Return on Investment of Superintendent Consultancy	14	2000 (1), 2001 (1), 2005 (1), 2007 (1), 2009 (1), 2012 (1), 2014 (1), 2016 (1), 2018 (1), 2022 (1), 2023 (4)

5.2.1 Current Public School Context and Climate

The current educational landscape has become increasingly more polarized, creating a challenging environment for superintendents' leadership of districts. Recent research outlines school

disruptions caused by national, state, and local disagreements over race, sexuality, gender, and COVID-19, which has impacted teachers, principals, and district leaders' desires to continue in the profession, further straining educators (Jochim et al., 2023; Zuckerman et al., 2023). Political polarization disrupted schooling, especially in districts serving predominantly white students (Jochim et al., 2023), and these disruptions were felt through additional public requests for information, instructional opt-outs, and book removals, forcing districts to shift resource allocation (Jochim et al., 2023). Most concerning, political polarization has led to threats against educators and district leaders having to intentionally work to overcome controversies (Jochim et al., 2003; Woo et al., 2003; Woo et al., 2003).

In addition, the prevalence of student trauma and mental health concerns increased during the pandemic, which established the critical nature of school connectedness and the importance of prevention and intervention efforts for school achievement (Hertz et al., 2023; Wilkins et al., 2023). In addition, superintendents have historically led districts through crises and traumatic events, including natural disasters, which required superintendents to be skilled at meeting the diverse and shifting needs of stakeholders, including instructional staff (Cannon et al., 2020; Henderson, 2023; Plein, 2022; Steimle, 2021).

Roegman, Allen, and Hatch (2017) and Moller (2018) discuss approaches for creating a culture of equity. Moller (2018) outlines the challenges in raising the expectations of personnel and the necessary collaboration between both school-level and district-level staff as they work to establish a deep purpose and improved understanding of power dynamics. Roegman, Allen, and Hatch (2017) elaborate on three elements that can undermine diversity, equity, and inclusion efforts, including a narrow focus on understanding race and challenges within a culture of nice.

Challenges and factors outside of standard operating procedures for superintendents' leadership roles include the navigation of teacher attrition, working conditions, and pay, attributing to post-pandemic stress factors. These factors increase by the regional location of a district (Zuckerman et al., 2023). Geographic and demographic factors influence a variation of district challenges and needs. Superintendent turnover is exacerbated in rural districts, as is a shortage of teachers and school leaders (Schwartz & Diliberti, 2023; Zuckerman et al., 2023). Schwartz and Diliberti (2023) found that superintendents cited job-related stress and community politics as top reasons for leaving the profession. A customized approach to supporting incoming superintendents requires an examination of the current political climate of education and the regional needs of urban, suburban, and rural school districts. Utilizing Bolman and Deal's (2017) Four Frames can be a helpful way to understand current challenges and provide a path forward (Stone, 2023).

5.2.2 Organizational Relationships.

Organizational relationships are complex. Clarke (2020) found that successful public sector engagement in education required skilled leaders with solid communication, collective management, transparent decision-making, and avid trust-building skills. Similarly, Duca (2020) found that superintendents who intentionally engaged both internal and external stakeholders in improvement efforts gained greater buy-in from stakeholders.

Organizational relationships with the school board are essential. Kravitz (2023) found engaging stakeholders in creating the district plan was necessary, including intentional engagement with the school board. Mountford (2004) outlines the essential nature of the superintendent and school board relationship; this relationship includes understanding the individual motives of school board members and the essential nature of trust and clear communication. Waters and Marzano (2006) describe the

importance of school boards hiring superintendents focused on student achievement and the stability of school and district-level leaders.

More specifically regarding entry plans, Pochintesta (2020) found engagement with entry plans differed by internal/external entry, with internally hired superintendents having the advantage of pre-existing knowledge of the political landscape, existing relationships, trust, and social capital. The foundational knowledge of the district's political landscape, pre-established relationships of trust, and social capital are essential components of garnering stakeholder voice and buy-in during the phases of plan development and implementation. An essential aspect of stakeholder engagement begins with developing trust built through district-wide engagement.

Poynton et al. (2018) found that direct training programs for parent and community stakeholders catalyzed the development of trust and sharing power. A stakeholder-training program called Leadership St. Vrain (LSV) was founded in 2009 by the St. Vrain Valley School District. "The purpose of LSV was to build trust and increase public participation through two key strategies: (a) to provide stakeholders a working knowledge of how their district operates, and (b) to build relationships between stakeholders and district administrators" (Poynton et al., 2018).

Regarding entry plans, Jentz and Wofford (2012) provide entry activities for critical groups, including classroom teachers, district administrators, students, parents, community, and school staff. Entry activities are essential for externally hired superintendents to build capacity for relational foundations. Therefore, the systems of consultancy support will differ for superintendents based on their knowledge and connection to the district. Assessing a superintendent's pre-existing knowledge and relationship within the district is vital to Bellwether providing consultancy support.

In addition to observing and assessing the affordances or constraints of internally versus externally hired superintendents, a component of public sharing for community buy-in is crucial to entry

planning. Hanover Research (2015) found that well-developed entry plans were publicly shared, included steps for engaging the community, prioritized relationship building, and included district assessment data. Leading within the 21st century requires a technology and social media plan to facilitate stakeholder engagement. According to a study conducted by Richardson et al. (2020), collaborating and communicating with stakeholders was vital for stakeholder engagement, and it was essential to nurture a technology-infused learning culture for all stakeholders across the district. Through social media and technology planning, Bellwether can support responsive, timely, and transparent stakeholder communication plans.

5.2.3 Entry Planning

Research supports the structural phasing of entry plan design, which can serve as a guide to Bellwether's phases of consultancy support (Cheatham et al., 2022; Jentz & Wofford, 2012). It is essential to identify the value, prevalence, and importance of entry planning model approaches, skills, training, and support and the intentional integration of diversity, equity, and inclusion to support the phases of consultancy work. Bolman and Deal (2017) emphasize the importance of established roles and responsibilities to better support and accommodate division members to achieve the shared goals of the organization. Additionally, they charge leaders to act as an architect, to develop and communicate a new conception of the organization's goals and strategies responsive to their communicated needs and circumstances.

5.2.3.1 Value, Prevalence, and Importance. Superintendents value entry planning (Pochintesta, 2020), and historically, researchers position entry planning as centrally crucial for superintendents (Sanaghan & Lytle, 2008; Murphy, 2005). Many superintendents use an entry plan when beginning a new job in a district (Thessin et al., 2022); however, the specific prevalence of use needs to be identified in the research. Kravitz (2023) found a connection between superintendent longevity and a positive impact

on student achievement, establishing an additional value for entry planning to reduce superintendent turnover. However, there needs to be more research on superintendent turnover (Grissom & Andersen, 2012), which is more concerning in rural areas (Zuckerman et al., 2023).

5.2.3.2 Models. Multiple resources outline how to design and implement entry plans. Two well-known resources will be further explored, including *The Entry Plan Approach* by Jentz & Wofford (2012) and the *Entry for Equity Framework* by Cheatham, Thomas, & Parrott-Sheffer (2022).

5.2.3.2.1 The Entry Plan Approach.

Figure 10:

The Entry Plan Approach (Jentz & Wofford, 2012)

The Entry Plan Approach			
Step 1: Design the Entry Plan (to give direction)	Step 2: Generate Data Systematically (to build trust)	Step 3: Make sense of data (to produce new thinking)	Step 4: Form an Action Plan (to support new behavior) Climate
New leader engages key people in designing and making public an Entry Plan that is transparent about the sequence of collaborative inquiry activities that will result in a blueprint for change.	To generate trust, respect, and credibility, a new leader takes time to understand key people and the organization from the inside out before making decisions.	To produce collective new thinking and build consensus for Entry Plan findings, data must be shared and understood collectively.	To produce decisions that will be implemented and positively reshape the organization, new thinking must be tested in the form of action planning and adjusted to ensure success.
(Jentz & Wofford, 2012)			

Jentz & Wofford (2012) outline a four-step entry plan model, including (1) designing the plan, (2) generating data systematically, (3) making sense of the data, and (4) forming an action plan. This model

can apply to entry planning at the school or district level. This model of entry planning begins with a focus on learning about the organization from the inside out. For the superintendent, key people include the school board, administrators, district office staff, teachers associations, employee organizations, and community groups, such as Parent Teacher Associations, community associations, and local community organizations. Suggestions for communicating the plan include facilitating an “all-hands meeting” to gather feedback and a memo with rationale, processes, and timelines. In the second phase, the superintendent communicates the interview and site visit plan, as well as interview questions. During interviews and site visits, the superintendent gathers data. The third phase includes sensemaking from the data collected. Data summarization through frequency counts and the superintendent’s engagement in group exploration of beliefs and values makes meaning of the data. In the final phase, the superintendent forms an action plan, which is drafted with 2-3 people and tested with key groups. Key groups are classroom teachers, district administrators, students, parents, the community, and school staff. The entry plan design is mapped into a six-month example timeline (See Appendix B).

5.2.3.2.2 The Entry for Equity Framework.

Figure 11

The Entry for Equity Framework (Cheatham et al., 2022)

Education Leadership Entry Phases



• Cheatham, J. P., Thomas, R., & Parrott-Sheffer, A. (2022). Figure 1.2

Cheatham, Thomas, and Parrott-Sheffer (2022) provide three phases for entry planning: (1) Reflect, (2) Listen and Learn, and (3) Plan to Act. The initial phase, Reflection, is characterized by deep thought and includes the leader reflecting on their identity and connections to the local environment, gathering input from “key advisors” who understand both the historical and political environment, and getting initial input on the first draft of the entry plan. This phase is focused on the superintendent trying to “see the system.” The second phase is “Listen and Learn.” In this phase, the leader continues to prepare for the official start date, where they introduce themselves and their goals. While engaging in this phase, the leader focuses on transparency and trust building. Next, the leader designs questions for gathering data and communicates those questions. The leader is focused on practicing deep listening and intentionally seeks data on how the organization works, for whom it is working, and for whom it is not working. In gathering multiple opinions, the superintendent intentionally deeply listens to underserved voices. The superintendent then shares in making sense of the data collected, its representation, and whom to include in sensemaking and solution creation. The final step in the listen-and-learn phase is communication. While communicating, the superintendent intentionally and honestly communicates the findings, motivates communal response, and counters stereotypes about students and the underserved community. Through communication, the superintendent will bring awareness to the strengths within the community, advance a shared interpretation of the challenges, and motivate future action. In the “Plan to Act” phase, the superintendent can build further credibility as the entry plan is actualized. In this phase, the superintendent uses skills of connecting with others and motivating others.

Several commonalities exist between *The Entry Plan Approach* and the *Entry for Equity Framework*. Both acknowledge that entry planning begins before starting a position. The superintendent collects all available data, including achievement data, watches board meetings,

observes media coverage of the district, and more. Both models address communicating the entry plan to stakeholders. There are also some differences between these two models. The most significant difference is the intentional focus on equity embedment throughout the *Entry for Equity Framework*. Further, given the research and tools developed since The Entry Plan Approach, the *Entry for Equity Framework* provides an especially timely resource for incoming superintendents.

5.2.3.3 Intentional Integration of Diversity, Equity, and Inclusion. The literature suggests that support for superintendents' attainment of high-achieving and equitable school systems includes leading and defending district purpose, creating and developing enabling factors for this to occur within classrooms, and an understanding of race, diversity, equity, and inclusion. After that, purposeful integration of these leadership practices into the actionable work, such as stakeholder engagement during rounds/school visits. These practices and tools could be incorporated into entry planning as superintendents seek to learn within a new district. Tools that enable a systemic means for purposeful integration are vital. Embedding this learning within the actionable work of superintendents is a secondary measure. According to a longitudinal study following the rounds practice of superintendents, "Increased attention to equity in the protocol and visit expectations resulted in increased attention to equity" (Roegman, 2017). Further, Roegman (2017) found two patterns relevant to this project that diminished the equity focal point, including understating race and the "culture of nice." Therefore, proactive training strategies on diversity, equity, and inclusion and their implementation into superintendents' work could result in high-quality and equitable districts.

Given the disparities through COVID-19 and the racial reckoning, there is an even greater need to integrate diversity, equity, and inclusion (DEI) into entry plans. Cheatham, Thomas, and Parrott-Sheffer (2022) provide a framework that intentionally integrates DEI into entry plans, including "building trust and being transparent, understanding self and understanding context, listening with

empathy and cultivating understanding, changing the narrative and galvanizing for action, and self and communal care” (p. 19).

Given the correlation between political polarization and rural districts outlined by Jochim et al. (2023), it may be of particular interest to determine how the rural superintendent intentionally incorporates diversity, equity, and inclusion into entry planning. Multiple researchers highlight the need for ongoing study of rural superintendents as equity change agents and place leaders (McHenry-Sorber & Budge, 2018; McHenry-Sorber & Sutherland, 2020) and how to navigate rural social, political, and economic conditions (Klar & Higgins, 2020). Lubberts (2023) found that rural district’s conceptualization of diversity, equity, and inclusion can be misleading, and additional funding and training are necessary for internal stakeholders. Based on research during the COVID-19 pandemic, rural superintendents who developed relationships with principals, teachers, students, and families were the most successful (Walls & Zuckerman, 2022).

Stone (2023) outlined the importance of progress with diversity, equity, and inclusion and the necessity of community support; however, this progress was incredibly challenging. Stone (2023) described how superintendents utilized Bolman and Deal’s (2017) Political Frame to garner community support for diversity, equity, and inclusion; however, superintendents described challenges garnering community support from rural school staff, including challenges understanding the role of microaggressions in daily practice and consumption with divisiveness; suburban superintendents described how the community was impacted by “national news media” and “community rhetoric” on “critical race theory, LGBTQ plus issues, transgender bathrooms, and masking through COVID” (p. 74-75). In addition, Stone (2023) described examples of diversity, equity, and inclusion success by utilizing Bolman and Deal’s (2017) Human Resources frame by superintendents serving urban districts who were

transparent, engaged in open dialogue, listened, humanized the community, and provided opportunities for facilitated ongoing small group dialogue with trained facilitators.

Of particular interest, Stone (2023) described the importance of trust, respect, and district diversity, equity, and inclusion work. In rural, predominantly white districts, there is a lack of racial diversity and a narrow conceptualization of diversity, equity, and inclusion, and race does not capture community diversity; superintendents across all district sizes found utilizing Boman and Deal (2017) Human Resource and Political frames to be essential. More specifically, Stone (2023) described that superintendents needed social awareness for the communities they served and leveraged locally aligned initiatives, such as character education and lessons on acceptance, which include teaching listening skills and respect. Further, superintendents described the importance of being aware of the local issues and knowing how to facilitate dialogue and engage the local community (Stone, 2023).

5.2.3.4 Foundational Leadership Skills and Strategies. Multiple studies have indicated foundational leadership skills for district superintendents, including communication, relationship/trust building, and political acumen (Eckert, 2019; Melton et al., 2019; Tienken, 2021; Webner et al., 2017 as cited in Stone, 2023). In addition, both data collection and complex decision-making skills are foundational for diverse, equitable, and inclusive entry planning.

5.2.3.4.1 Data Collection Skills and Strategies. Bryson (2011) provides a framework for strategic planning that begins with a deliberate approach to information gathering. The ABC framework includes “A” (where you are), “B” (where you want to be), and “C” (how to get there). Jentz and Wofford’s (2012) Entry Plan Approach describes the superintendent as the interviewer, engaged in two-way learning, using active listening and collecting both quantitative and qualitative data; in making sense of the data, the superintendent organizes data into two categories: how and what. “How”

describes how the organization works and where adjustments are needed. “What” describes the direction the organization needs to move, including goals and priorities.

Sharing insight from Howard University professor Ivory Toldson, Cheatham et al. (2022) included three key ideas central to meaningful data collection. The first is “good data”. By this, the authors suggest that data collection should be comprehensive, including both qualitative and quantitative elements, and ensuring a complete picture or story is created about the organization (Cheatham et al., 2022). Secondly, they encourage a “thoughtful analysis” of collected data, as several analytic strategies enable meaningful conclusions. Analytic strategies include within-group analysis, the analysis of growth data, and analysis across intersecting groups (Cheatham et al., 2022). Finally, Cheatham et al. (2022) encourage a compassionate understanding of the data as an absence of compassionate analysis is rooted in bias, and the data analysis process must provide opportunities to confront bias, contextualize evidence, and test assumptions.

Similarly, the National Center for Education Research’s Technical Working Group (2022) indicated the importance of positionality and understanding bias, which may impact how individuals make sense of information. To improve data analysis, the working group recommended workshops on the process of reflexivity and a tool to help consider positionality, which could apply to Bellwether’s new market segment. A tool that could help design data collection is the creation of a Data Collection Matrix. The matrix would include the questions a superintendent will answer, the data sources, the questions for different audiences, and the rationale.

5.2.3.4.2 Communication Skills and Strategies. Within each component is communication, which many studies contend to be vital to the entry-planning process and leadership in general (Duca, 2019; Stone, 2023). Establishing the parameters for communication and means for ongoing strategic planning updates with the identified stakeholders should be prioritized at the outset (Duca, 2019).

In particular, inclusive language is essential for superintendents in all written and spoken communication. Inclusive language helps to communicate in a way that is unbiased and respectful to communities (Ferguson & Bellamy, 2022). Multiple resources are available for district communication departments and superintendents to consider when designing communication that includes the global majority and underserved communities (American et al., 2023; Ferguson & Bellamy, 2022; Gross, 2020).

Stone (2023) found that superintendents primarily utilized Bolman and Deal's (2017) Human Resources frame to support communication efforts; however, they observed all frames. Stone (2023) found that communication included both information sharing and collaboration; communication differences were noted by the size of the district, with rural superintendents able to provide more individual-to-individual communication and larger districts dependent on wider modalities of communication. Stone (2023) found that all superintendents utilized multiple communication methods with internal and external stakeholders, including "email, newsletters, social media, and communication applications," with suburban and rural superintendents using less social media. Urban superintendents described more extensive communication protocols detailing those included in communication responses and timelines for feedback (Stone, 2023). Regarding traumatic events (e.g., a racism incident), superintendents organized multi-prong communication methods, including written communication and in-person sessions (Stone, 2023).

Based on Stone (2023), communication includes collaboration, defined as "information sharing [with] two or more people working on a topic or solving a problem together" and "build[ing] consensus, help[ing] individuals feel a part of something larger or develop[ing] answers to complex problems" (p. 82). Superintendents intentionally build diverse teams, including internal staff and external stakeholders, such as students, families, and underrepresented community members, to collaborate and inform complex decisions (Stone, 2023). Of particular interest to the project team, Bolman and Deal's

(2017) Symbolic Frame was rarely represented by superintendents, which could be especially important for improved communication around diversity, equity, and inclusion efforts. For example, in some rural communities, the symbol of a line and people getting in front of others in the line has derailed diversity, equity, and inclusion efforts (Vedantam, 2017). Superintendents could benefit from strategically de-constructing these narratives from a scarcity mindset or reframing using the line narrative. For example, how equity helps others to advance in the line.

5.2.3.4.3 Relationship Building Skills and Strategies. “A leader is listening to understand the way the organization works from the perspectives of both the people who work inside the organization and the people who belong to the community it serves.” (Cheatham et al., 2022, p. 83). Listening, and in particular, listening with empathy, requires emotional intelligence. The authors of Cheatham et al. (2022) posit self-awareness, self-regulation, motivation, and empathy as the critical emotional intelligence skills driving this work. Further, the authors note that in addition to this emotional intelligence, leaders must seek out the unheard voices.

Research has shown connections between servant leadership theory and organizational citizenship behavior, which included concepts of effective organizations and trust (Ja’afaru, 2014). Research on the culture of care applies a cultural lens to develop school environments where all students feel valued, can engage, and have a sense of belonging to be fully present (Cavanagh et al., 2012).

Benna and Hambacher (2020), as cited in Stone (2023), define trust through the lens of principals and superintendents. Principals define trust as a dependable leader who follows through on promised action; further, principals found value in superintendents who modeled “vulnerability and genuine caring for others” (Benna & Hambacher, 2020, as cited in Stone, 2023, p. 25). Further, trust was conceptualized by Legood et al. (2021), as cited in Stone (2023), with both “cognitive and affective” dimensions (p. 25) with the highest ratings of cognitive trust in “those who displayed authentic

leadership” and “affective trust” including “emotional and interpersonal relationships” and “ethical leadership” (Benna & Hambacker, 2020 as cited in Stone, 2023 p. 26).

Further, Stone (2023) found three subthemes for trust, including “building relationships, gaining community support, and respect” (p. 61). Regarding trust and building relationships and Bolman and Deal’s (2017) Four Frames, the Human Resources frame was the most frequently used across superintendents serving rural, suburban, and urban districts; in addition, the Political Frame was also used but less frequently (Stone, 2023). More specifically, Stone (2023) found that superintendents built stakeholder relationships through “listening, demonstrating understanding of the problem, and working to solve problems collectively” (p. 62); participants used “DEI practices,” defined as helping students to feel safe, valued, and included in the school community. Stone (2023) also described leveraging these practices to support classroom instructional staff to be more inclusive of students with disabilities.

Stone (2023) found visibility was essential to relationship building, and there were differences in the use of visibility based on the size of the district; rural superintendents were intricately involved in day-to-day activities, while superintendents serving both suburban and urban districts had to be intentional when and where they were visible.

Stone (2023) found that for superintendents serving rural, suburban, and urban districts to pass budgets, they must gain community support, primarily connected with district stakeholder perception of fiscal responsibility and associated with Bolman and Deal’s (2017) Political Frame. In addition, Stone (2023) found garnering district support through being mindful of community support around taxes and “staying at or below the tax levy limit,” and when a tax increase was needed, the superintendent engaged in intentional communication around the “importance of the project” (p. 75).

A final trust theme outlined by Stone (2023) included respect, conceptualized using Bolman and Deal’s (2017) Human Resource frame and the Political Frame as a secondary consideration. Respect for

staff was described as “being accessible,” “creating a positive work environment,” and “... with meaningful and relevant and timely feedback” (Stone, 2023, p. 76). Further, superintendents described the importance of acknowledging staff who may be under-recognized, including “a custodian or a parent or a student or a teacher or an aide” (Stone, 2023, p. 76).

5.2.3.4.4 Complex Decision-Making Skills and Strategies. While engaging in the entry planning process, leaders will encounter complex problems. While it can be tempting to reduce complex problems to simple problems, leaders may be more likely to recognize the complexity of the problem and engage in sensemaking with transparency when provided with a framework to work through complex problems. Snowden and Boone (2007), as cited in Cheatham, Thomas, and Parrott-Sheffer (2022), provide a framework for complex decisions.

Figure 12

Framework for Complex Decisions (Cheatham et al., 2022)

Context Characteristics	Approach to Leadership
Clear: Characterized by clear cause-and-effect relationships that are easily discernable by everyone.	A leader should sense, categorize, and then respond; apply “best” practices; rigid constraints exist.
Complicated: There exist multiple right answers, and though there is a clear relationship between cause and effect, not everyone can see it.	A leader should sense, analyze, and then respond; apply “good” practices; governing constraints exist.
Complex: Right answers do not exist, and there is no clear relationship between cause and effect; unpredictable.	A leader should probe, sense, and then respond; experiments lead to emergent practice; enabling constraints are needed to support innovation.
Chaotic: Searching for the right answer is pointless. The relationship between cause and effect is impossible to determine amid turbulence.	A leader should act, sense, and then respond; actions produce novel practice; there are no constraints.
<p>As cited in Cheatham, Thomas, & Parrott-Sheffer (2022) p. 120. Snowden, D.J. & Mary E. Boone, M.E. (2007). “A Leader’s Framework for Decision Making,” Harvard Business Review, November 2007, https://hbr.org/2007/11/a-leaders-framework-for-decision-making, “Getting Started with Cynefin,” (video) Cynefin Company, https://thecynefin.oc/about-us/about-cynefin-framework/</p>	

In addition, Stone (2023) outlines how leaders can utilize Bolman and Deal's (2017) Four Frames to engage in multi-framing for complex decisions. This framing allows the leader to have a deeper understanding of the current challenge, and it provides a method to consider how each frame is leveraged to move forward, given contextual differences in leadership based on the district's size (Stone, 2023).

5.2.3.4.5 *Storytelling Skills and Strategies.* Supporting a high-achieving and equitable school system begins with the question of purpose and how leadership and teachers' work interweave into broader social power structures (Moller, 2018). The study demonstrated how leading teachers' efforts to raise academic and social standards among students was a complex endeavor and how a productive interplay between district and school-level leadership became one of the critical enabling factors (Moller, 2018). Tools and methodologies surrounding storytelling aimed at developing a solid district purpose tied to broader impact are necessary for teacher buy-in to district goals. Superintendent support tools could include co-creating rich storytelling and distributed leadership models aimed at shared power and vision for all stakeholders throughout the district.

Cheatham et al. (2022) offer a three-tiered tool for the creation of a shared story, "The Story of Self," "The Story of Us," and "The Story of Now". Within the Story of Self, the leader shares their values and demonstrates why they are motivated to serve. Within The Story of Us, there is an emphasis on shared values amongst community and organization members. Finally, within The Story of Now, specific and urgent challenges and choices are communicated to enable the community members to realize their purpose, serving as a deliberate bridge between the learning and action phase for new leaders.

5.2.3.4.6 *Connections with Social and Emotional Competencies.* The Collaborative for Academic, Social, and Emotional Learning (CASEL) Framework includes self-awareness, self-management, social awareness, relationship skills, and responsible decision-making (CASEL, 2023).

Each of the skills for foundational leadership outlined above aligns with the CASEL framework. For example, self-awareness includes awareness of one's identity, emotional intelligence, and examining bias; relationship skills include building healthy relationships and effective communication; and responsible decision-making includes reasoned judgment based on data and the individual's role in promoting community well-being. Further, these social and emotional learning skills have been connected with effective leadership for superintendents (Fulcher Gutierrez, 2017) and described as foundational for academic learning as "all learning is social and emotional" (Berman, 2018). Finally, superintendents have a critical role in both developing their own social and emotional competencies, as well as creating the school and district environments that are conducive to both staff and student social and emotional development (AASA, 2020; Dusenbury & Weissberg, 2018).

5.2.3.5 Training and Support Networks. Pochintesta (2020) noted the importance of entry planning for superintendent training and suggested that professional associations, state departments of education, and higher education programs must make it a priority; further, Boards of Education also need training in entry planning, which state associations can provide. In addition, training improved the quality of entry plans (Pochintesta, 2020). There are several implementation challenges, including superintendents needing consistent entry plan training in school (Gray, 2005; Pochintesta, 2020; Swindle, 2005), with some receiving training through state associations or other mechanisms (Pochintesta, 2020).

A dissertation from Valenzuela (2021) emphasized the power of relationships in several key findings related to superintendent retention. Notably, access to professional networks and organizations was supportive for superintendents. Valenzuela (2021) states, "Regardless of the size of the consulting entity or whether the interactions are professional or a venting session, the vast majority of participants found that having a trusted colleague or network to seek counsel was a support that they perceived helped them retain their position"(p. 128). Within their network, strong relationships with board

members contributed to stronger connectedness, improving both trust and vision for the superintendents (Valenzuela, 2021).

Finally, Poynton, Kirkland, and Makela (2018) outlined how training increased stakeholder engagement, shared understanding, and ability to advocate and trust in district-level leaders; further, district superintendents can increase community confidence and involvement and reduce inequities for those underserved through community training.

5.2.4 Public School Stakeholders and Listening Tours

Proactively attending to the voices and power dynamics of system stakeholders is vital. Given the complexity of educational organizations, the superintendent must value and make space for all voices to achieve an equitable entry plan. Valenzuela (2021) notes, "Building connections with the movers and the shakers in the community can determine whether you will continue as a superintendent because of the influence they can exert over a school board. The types of groups referenced as important to join, interact with, or be aware of are nonprofits, service-oriented organizations, professional organizations, business groups and elected officials. Specifically named groups were Rotary Clubs, Lions Clubs, Kiwanis, chambers of commerce, city managers, police chiefs, fire chiefs, women's organizations, ACSA and CALSA [professional organizations]." p.129

The initial conversations around an entry plan may begin with school board members. School board members hold positional power in the system. Proactive attention to power dynamics is essential in establishing a collaborative relationship with incoming superintendents (Mountford, 2004; Glass, 2001; Kravitz, 2023), including preventing turnover (Grissom, 2012). Inversely, boards that set clear expectations for incoming superintendents enable the conditions for students' success (Lamonte & Delagardelle, 2009, as cited in Duca, 2020), further indicating the significance of strong relationships between the superintendent and the school board. Finally, regarding superintendent and school board

relationships, Waters and Marzano (2006) found that school boards need to pursue skilled superintendents who support teaching and learning and build the capacity of district and school leadership, which increases stability.

Stakeholder voices from school leaders and instructional staff are forged through the presence of “reciprocal trust” in “odds-beating schools” (Lawson et al., 2017, as cited in Duca, 2020, p.29). Clarke (2020) found that in high-achieving schools, strong leadership, effective communication, and collaborative decisions were all essential in engaging stakeholder voices; further, Clarke (2020) described foundations for meaningful stakeholder engagement, including the importance of building trust, transparent work, and inclusive participation. Collaborative strategic planning enables understanding from stakeholders and facilitates commitment from within the organization (Duca, 2020). Effective collaboration with pertinent stakeholders enables superintendents to establish achievable district goals (Waters & Marzano, 2006).

Richardson, Clemons, and Sterrett (2020) interviewed 14 United States superintendents to understand how they leveraged technology to engage internal school staff. Three themes emerged, including the importance of staff agility with technology, responsive and helpful technology training, and internal staff engagement increased with access to opportunities to collaborate with clear communication (Richardson et al., 2020).

Regarding stakeholder listening tours, it is essential for the superintendent to intentionally seek out nondominant voices to ensure their inclusion in entry planning, including students, parents, and underserved communities (Cheatham et al., 2022). In addition to listening to these stakeholder groups, the superintendent would find it helpful to seek out key advisors who know the local context and the painful histories (Cheatham et al., 2022).

Regarding listening tour questions, several resources guide the types of questions to ask. Cheatham, Thomas, and Parrott-Sheffer (2022) suggest one strength, challenge, and opportunity (See Appendix C). Jentz (2012) suggests asking one question to understand the interviewee's relationship with their role, a key issue, and necessary changes (See Appendix D). In previous work, Jentz (2005) suggested asking four categories of questions: what, how, people, and leadership questions.

Foundational superintendent skills for listening tours include deep listening (Cheatham et al., 2022) and relationship building (Bolman & Deal, 2017; Cheatham et al., 2022; Pochintesta, 2020). These skills are critically important for the rural superintendent, who must create and sustain relationships with teachers, school leaders, caregivers, and the local community, described as "people-centered leadership" (Preston and Barnes, 2017, cited in Zuckerman et al., 2023).

Finally, the Seven Circle Model (n.d.) from the National Equity Project, as cited in Cheatham, Thomas, and Parrott-Sheffer (2022), can be a valuable tool for the superintendent to utilize before a listening tour. This model looks at the more extensive system from a balcony, and it can help see the full circle of human experience, including what is both technical and relationship or above and below the line.

5.2.5 Superintendent Needs by Region and Size

There are distinct differences in the superintendent's job, leading some researchers to say there is not a "superintendency" but "superintendencies" (Glass et al., 2001, p. 15). One example of these differences is leadership in rural education. Klar and Huggins (2020) identified a framework to support rural school leaders through transformational coaching to support data-based decisions and create a district and school environment that centers teaching and learning. Zuckerman et al. (2023) identified several necessary roles for superintendent success. For the rural superintendent, the democratic leader and the communication role were most critical. Additional research is necessary for the social scientist's

role and equity efforts (Walls & Zuckerman, 2022). Further, the rural superintendent serves as an essential bridge between the local and global and helps students to better understand the impacts of both on their lives (McHenry-Sorber & Budge, 2018). In more recent work, McHenry-Sorber and Sutherland (2020) found metaphors of “cow herder,” “river guide,” and “weatherman” helpful for single district superintendents and superintendents serving multiple districts.

5.2.6 Superintendent Turnover and the Return on Investment of Training and Support

Superintendent turnover data needs a national database, which causes a limitation within the literature review. According to Sawchuk (2022), “There is no national, year-over-year data collection that tracks a sample of superintendents, so even arriving at a benchmark figure for turnover is difficult. (One often-cited 2006 estimate from AASA, the School Superintendents’ Association, put it at between 14 percent to 16 percent annually, but it is not clear how that data was derived.) All of the estimates vary somewhat because of differences in method” (Linking section, para. 7). A synthesis of available data and practitioner feedback primarily highlights that the superintendent turnover has increased within the current education landscape, exceeding the range of average annual percentage rates.

The COVID-19 pandemic and political factors changed the landscape, responsibilities, and required skill sets of superintendents. Ward (2023) states, “What once was a profession that required you to ensure students met their academic potential is now a multifaceted and complex job that requires intense training and preparation” (Linking section, para. 1). Following the 2020-2021 school year, a “mass exodus” of superintendents occurred, with more than 3,000 leaving their positions, far exceeding the pre-pandemic turnover rate (Ward, 2023). Currently, the states experiencing the most significant superintendency turnover are those with higher political interference and prohibitive laws and regulations (Ward, 2023). The pre-pandemic superintendent turnover rate was 13 percent (Toppo, 2023). According to Toppo (2023), “The American Association of School Administrators recently found

that about 25 percent of superintendents across the country have left their jobs in the past year, a marked increase from previous years" (p. 30). The president of Ray and Associates, an executive search firm, states, "The fact of the matter is the departure from the seat of the superintendency has never been this high" (Toppo, 2023).

As cited in Zuckerman et al. (2023), "Superintendencies are segmented by community type, including rural, suburban, and urban (Cooper et al., 2000), and by region (Grissom & Mitani, 2016). These contexts, in turn, shape the work of district leaders" (Glass et al., 2001, p. 15). Therefore, the needs and support for superintendents are context-specific and vary by community type and geographic region. According to the US Department of Education (2014), half of all school districts in the United States are rural districts (Zuckerman et al., 2023). Rural superintendent turnover is higher when compared to urban and suburban districts (Zuckerman, 2023). Turnover is particularly costly for districts and impacts student achievement. As cited in Zuckerman (2023), "Stability in district leadership appears to support rural student achievement (Masumoto & Brown-Welty, 2009), while heightened superintendent turnover has the potential to depress student achievement and is costly for districts" (p. 56).

Recruitment of superintendents is made more difficult by principal and cabinet member turnover, positions that would typically advance into district superintendency (Ward, 2023). Critical factors to superintendent retention include hiring a candidate with close connections to the local community, a deep commitment to the district, and focusing on social, economic, and political contexts (Zuckerman, 2023). Therefore, without available district insiders to promote to the highest leadership positions, outsider candidates have the task of trust-building within complex and context-specific districts, adding to the demands of the position and superintendents' retention.

The return on investment (ROI) of superintendent retention efforts includes non-financial and financial benefits to school districts. Consistent leadership impacts student achievement, promotes district trust, and leads to positive outcomes for long-term goal achievement. As cited in Zuckerman, 2023, “Glass and Francehini (2007) reported that 55% of all superintendents would be unemployed within three to five years. This short tenure can prove to be problematic for school districts (Williams & Hatch, 2012) because longevity is related to stability and allows a leader the opportunity to guide districtwide plans to completion (Hoyle et al., 2005; Palladino et al., 2007)”.

As cited in O’Connor and Vaughn (2018), “The average superintendent tenure is three to five years (Grissom & Anderson, 2012; Johnson et al., 2011)”. Therefore, recruitment costs can repeatedly reoccur for districts, at costs ranging upwards to \$100,000 per search, according to an article by the American School Superintendents Association (Morrison, 2023). Investing in training costs to promote superintendent retention has a higher non-financial and financial return on investment when compared to the adverse effects of superintendent turnover.

PROJECT DESIGN

6.1 Project Methodologies

The improvement project followed a sequential design through a multi-method approach. The design of data collection aimed at providing rich descriptions to drive conceptual understanding, with each data collection phase progressively informing the next. The project team scheduled two focus group meetings with Bellwether to learn more about their organizational needs, define a problem of practice, and request organizational documents. The first focus group served as an introduction to the organization and a sharing of potential problems of practice by the Policy and Evaluation Team. The second focus group included a member of the Strategic Planning Team, and through the cross-sectional representation of Bellwether’s teams, the organizational problem of practice was defined.

Following the focus groups, the project team conducted an initial literature review to understand the current educational context and climate. The problem was layered and complex and situated within a post-pandemic and politically divisive climate. Given this complexity, it was essential to contextually understand Bellwether's desired partnerships and service offerings with public school districts.

After defining the problem of practice and understanding the current educational climate, the team drafted one primary and four secondary questions. The project questions guided a second literature review focused on organizing themes surrounding the superintendent's needs by region and size, financial feasibility and return on investment, post-pandemic and political environment turnover, and equity-focused listening tours and 100-day entry planning.

Bellwether's organizational documents were gathered, stored in Dropbox, and redacted to assess organizational mission, capacity, equity commitments, market segment experience, and previous project reports. Interviews were conducted across the department segments of Bellwether's Policy and Evaluation and Strategic Advising teams to confirm and expand upon the document review. This also served as a third data collection point and information gathering between the project improvement team and the partner organization.

Bellwether interviews and the literature review informed superintendent interview questions that led to five superintendent interviews. Superintendents were interviewed to understand their needs, variations surrounding size and geography, and the need for superintendent training support surrounding entry planning periods. These interviews also aimed at identifying the financial capacity and value of investing in this training and support and an understanding of financial decision-makers within the district as a potential market segment for Bellwether's consultancy model.

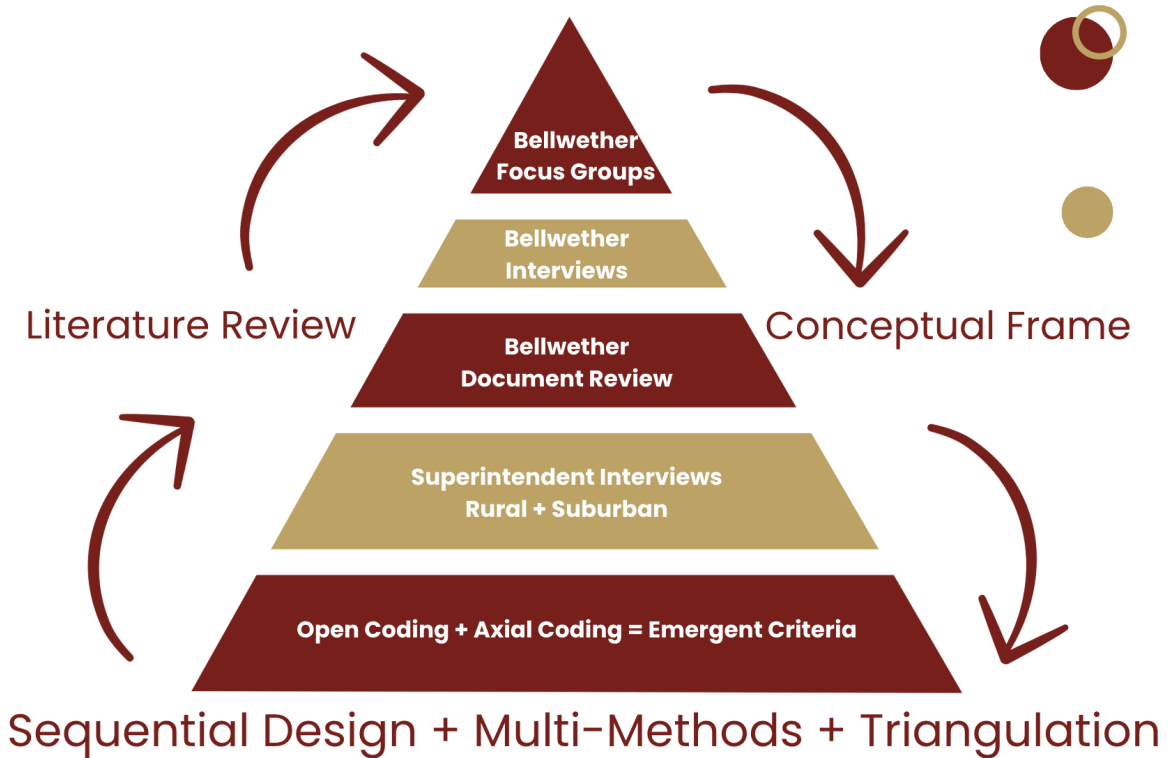
Following the data collection process, a triangulated analysis occurred with intentional alignment to the project questions, conceptual framework, literature review, and axial coding of documents and

interview transcripts. Bolman and Deal’s Four Frames (2017), the project’s conceptual framework, through diversity, equity, and inclusion serving as its foundation, also informed data collection with an emphasis on the political, structural, human resources, and symbolic frames.

Figure 13

Data Collection & Analysis Process

Data Collection & Analysis Process



6.2 Recruitment and Project Sample

The improvement project aimed to illuminate findings to generate recommendations and a roadmap to serve as the basis for Bellwether’s design of a consultancy model and marketing pitch for their desired market segment, public school superintendents. Three Bellwether staff interviews included leadership from the Policy and Evaluation and Strategic Advising Teams, as the work will be a

cross-sectional collaborative effort. This series of interviews utilized a purposive methodology, ensuring voices from each team were represented in the inquiry, as well as an inclusion of diverse identities.

The sample of Bellwether requested documents aligned with the problem of practice, primary project question, and supporting question one surrounding Bellwether’s capacity, affordances, and constraints with a focus on analyzing organizational alignment. The documents reviewed included Bellwether’s Library of Insights, Evaluation Equity Commitments, Bellwether Measurement and Evaluation Institute, project samples, and the organization’s current annual report.

Table 4

Bellwether Data Collected

Bellwether Data Collected	Quantity
Bellwether Focus Groups	2
Bellwether Policy and Evaluation Staff Interviews	2
Bellwether Strategic Implementation Staff Interviews	1
Bellwether Document’s Collected	8

The second phase of interviews focused on superintendents who may or may not have utilized entry planning, with data collected from five interviews. Participant gathering included a snowball method with superintendents in the Southeastern United States. The initial superintendent interviewee provided the names of additional superintendent contacts to interview. Ultimately, the project team conducted five superintendent interviews.

Table 5

Superintendent Regional and District Demographic Data

District Representation Sample		
Interviewee	District Type/s	District Size
#1	Rural Fringe	Small
#2	Rural Fringe	Small
#3	Rural Fringe	Small
#4	Suburban	Large
#5	Suburban + Rural Distant	Large

Table 6

Project Data Sample Size and Collection Methods

Project Sample Size and Collection Methods			
Focus Groups	Bellwether Document Review	Bellwether Interviews	Superintendent Interviews
n=2	n=8	n=3	n=5
Purposive Sample	Purposive Sample	Purposive Sample	Snowball Sample

6.3 Data Collection Plan

The project's data collection plan aligns with the primary and supporting project questions. The unit of analysis is Bellwether's organizational documents, Bellwether's Policy and Evaluation and Strategic Advising teams, and suburban and rural superintendents. The interview questions align with the project's primary stakeholders, Bellwether's staff, and secondary stakeholders, district superintendents. Equally, an explicit listing of the rationale for these decisions ensured a comprehensive data collection plan (See Appendices E, F, G, and H).

6.4 Interview Data Instruments

The improvement project team designed two audience-specific interview protocols to answer the project questions. The primary project question focused on Bellwether's affordances and constraints in developing a consultancy model and marketing pitch to support superintendents in stakeholder listening tours and 100-day entry plans. Project support question one was aligned to Bellwether interviews, and supporting questions two to four were aligned to superintendent interviews.

The Bellwether interview instrument began through structural questions, defining central terms including diversity, equity, and inclusion, 100-day entry planning, and stakeholder listening tours. The project team utilized Bhattacharya (2017) to design interview questions. The questions then explore Bellwether's goals for this new market segment. These questions included both descriptive and task-related grand-tour questions. The third portion focused on Bellwether's affordances, including descriptive, grand tour, and task-related grand tour questions. The fourth section focused on constraints. See Appendix G: Bellwether Interview Protocol and Codebook.

The superintendents' interview instrument began by capturing their experiences. A description question detailing the type of districts served (rural, urban, suburban, size, geographic location) was included. The second set of interview questions focused on central terms, including diversity, equity, and

inclusion, 100-day entry planning, stakeholder listening tours, and experiences/training regarding diversity, equity, and inclusion. The third set of questions focused on project support question four regarding the equitable inclusion of stakeholder voices into listening tours and 100-day entry plans. These questions included both grand-tour and specific grand-tour questions. The fourth phase of interview questions supported project support question two on superintendent need variance, including grand-touring and structural questions. The final portion of the superintendent interview was designed to capture knowledge about potential partnerships and a return on investment, including structural questions, a specific grand-tour question, and a contrast question. See Appendix H: Superintendent Interview Questions.

6.5 Data Collection Timeline

The data collection process occurred over five months and intersected with the start of a new school year. This intersection occurred during the superintendent interview phase, which impacted the project's sample size of superintendent interview respondents. To address this limitation, the team observed diverse experiences spanning suburban, rural, and cross-sectional geographic districts. The snowball method also allowed for increased participation based on the superintendent's network of relationships, which provided the improvement project team access through these pre-established relationships of trust. A limitation of the snowball sample was the exclusion of urban superintendent interviews. However, district size diversity was garnered through the superintendent interviews.

Figure 14

Data Collection Timeline

Data Collection Timeline			
Date	5/17/2023	6/2/2023	8/9/2023
May 2023–October 2023	Bellwether Focus Group 1 – Project Launch	Bellwether Focus Group 2 – Define Problem of Practice and Request for Organizational Documents	Bellwether provided organizational documents in Dropbox
8/23/2023	8/28/2023	8/30/2023	9/1/2023
Interview with Bellwether Staff Member #1 Policy and Research Team @ 2:00 PM EST	Interview with Bellwether Staff Member #2 Strategic Planning Team @ 11:00 AM EST	Interview with Bellwether Staff Member #3 Policy and Research Team @ 2:00 PM EST	Interview with Superintendent #1: @ 12:00PM EST
9/22/2023	9/27/2023	10/13/2023	10/16/2023
Interview with Superintendent #2: @ 9:00AM EST	Interview with Superintendent #3: @ 12:00PM EST	Interview with Superintendent #4: @ 8:00AM EST	Interview with Superintendent #5: @ 3:00PM EST

DATA ANALYSIS

7.1 Data Analysis Plan

The goal of this improvement project is to analyze Bellwether’s organizational capacity to support a new market segment of incoming superintendents through listening tours and entry planning. The improvement project supported validity through the following methods: triangulation, participant

validation strategies, thick description, multiple coding, and multi-methods research, as described by Ravitch and Carl (2021).

Regarding triangulation, the project team used multiple approaches, including data, investigator, and theoretical triangulation. Data triangulation was accomplished by cross-referencing the experiences of Bellwether's staff to the organizational document review, superintendents' needs, and literature review findings. Investigator triangulation was accomplished through collaborative analysis from the improvement project team members. Theoretical triangulation was addressed through multiple theories that inform each construct within the study.

The second method for validity was participant validation strategies. At the commencement of each interview, questions adapted from Ravitch and Carl (2021) ensured that the captured data met the participants' intent.

- Is there anything further you want to add or clarify regarding Bellwether's affordances or constraints in supporting superintendents as they integrate stakeholder voices within their entry planning? (Bellwether interviews)
- Is there anything further you want to add or clarify regarding supporting superintendents as they integrate stakeholder voices into their entry planning? (superintendent interviews)

In post-interview emails, the improvement project team provided the redacted transcript to each participant, allowing for time to review and ensure validity surrounding the following questions:

- Are there any concerns or clarifications?
- Is there anything we did not capture?
- Do you have any further clarifications you want added or modified?

See Appendix G and H for the interview protocols.

The third method for validity is thick description. An analysis of the documents, along with the interviews of Bellwether's team, enabled contextually relevant information with the findings from the interviews. Social and cultural contexts from the organization frame the findings from the interviews. Employees' experiences validated the initial findings from the document analysis, such as the Evaluation Equity Commitments Document and sample projects.

Multiple coding was the final validity method. Bellwether and superintendent interviews were a deductive and inductive coding process. Bellwether's document review was a deductive process based on the data informed by Bellwether's interviews. The process of multiple coding included open and axial coding, leading to emergent criteria. The improvement project team individually coded the assigned transcripts and documents and collaboratively analyzed the coded transcripts into axial codes, highlighting emergent criteria (See Appendix J).

7.2 Document Review Analysis

7.2.1 Data Analysis

The document review consisted of a three-stage plan. We began with a first pass, organizing our documents. On the second pass, we skimmed the documents for themes utilizing our codebook. Then, we organized the citations by themes. On the third pass, we organized the themed citations by research questions, and we triangulated these themes with our conceptual frame, literature review, and interview data.

7.2.2 Emergent Criteria

The document review analysis utilized a deductive coding methodology. After the focus groups and Bellwether interviews, we developed a codebook to better understand and gather insights from the provided organizational documents. We sought to triangulate findings from the interviews with their

internal documents. Codes included affordances and capacity, methodologies, alignment with mission and organizational values, and funding.

Table 9

Document Review - Emergent Criteria Frequency

Document Review – Emergent Criteria	Frequency
Affordances and Capacity	27
Methodologies	9
Mission and Organizational Values Alignment	14
Funding	4

7.3 Bellwether Interview Analysis

7.3.1 Data Analysis

The Bellwether interview questions also included deductive codes stemming from the problem of practice, research questions, and literature review. Inductive codes were generated in alignment with themes within the initial focus groups and document review. We used an open coding process to analyze each interview individually. Then, we analyzed the documents through a cross-referencing process to highlight commonalities through axial coding. Finally, we defined emergent criteria and triangulated them back to our research questions, conceptual framework, and the literature and document review.

7.3.2 Emergent Criteria

Table 10

Bellwether Interviews - Emergent Criteria Frequency

Bellwether Interviews - Emergent Criteria	Frequency
Affordances and Capacity	39
Constraints	13
Methodologies	19
Desires for Product	15
Mission and Organizational Values Alignment	11
Terms	3
Funding	10

7.4 Superintendent Interview Analysis

7.4.1 Data Analysis

The superintendent interview questions also included deductive codes stemming from the problem of practice, research questions, Bellwether interviews, and the literature review. Inductive codes were formed in alignment with themes within the initial focus groups and questions that were generated within the Bellwether team interviews. We used an open coding process to analyze each

interview individually. After that, we analyzed the documents through a cross-referencing process to highlight commonalities through axial coding. Finally, we defined emergent criteria and triangulated them back to our research questions, conceptual framework, and the literature review.

7.4.2 Emergent Criteria

Table 11

Superintendent Interviews - Emergent Criteria Frequency

Superintendent Interviews - Emergent Criteria	Frequency
Phases of Entry Planning Support	20
Power and Position	11
Strategic Partnerships	9
Listening Tour Inclusions	21
Listening Tour Methodolgies	11
Diversity, Equity, and Inclusion	14
Funding	15
Perceived Value and Return-On-Investment	21
Needs	26
Communication	5

FINDINGS AND RECOMMENDATIONS

The primary project question was answered through a multi-methods approach, triangulating the literature review, conceptual frame, document review, and interview emergent criteria focusing on four supporting project questions. Four key findings emerged supported by detailed findings, contextualized and documented using Bolman and Deal's Four Frames (2017) with diversity, equity, and inclusion at the foundation of each frame. Aligned recommendations were formulated for Bellwether's use in developing its consultancy model and marketing pitch materials to support equity-focused and stakeholder-inclusive superintendents' entry plans.

Primary Project Question: What support elements are necessary for newly appointed superintendents to ensure the inclusion of stakeholder voice within 100-day entry plans in alignment with Bellwether's mission and organizational capacity?

8.1 Support Question 1

Support Question 1: To what extent do Bellwether's organizational mission, affordances, and constraints support the development of a consultancy model/marketing pitch to support superintendents with 100-day entry plans?

Key Finding 1: Bellwether's affordances align with developing a consultancy model/marketing pitch to support superintendents' entry. These affordances include experience supporting complex organizations, a strong foundation of methodological research and improvement implementation, application of equity commitments, education insider-consulting staff, and expertise utilizing district staff as a partner on project teams.

"I think what the evaluation team brings is a really systematic way of gathering and analyzing data."

Detailed Findings:**Organizational Mission**

1. Bellwether envisions an education system that is effective and equitable, inclusive of coherent supports, responsive systems, and strong leaders, the tenants of this work. (Symbolic Frame)
2. Bellwether demonstrates a commitment to diversity, equity, and inclusion. (Symbolic Frame)

Affordances

3. Bellwether has created evaluation equity commitments that they operationalize through their work with consultancy partnerships. (Symbolic and Structural Frames)
4. Bellwether's support for superintendents must include a universal understanding of context, positionality, and diversity, equity, and inclusion to align with Bellwether's organizational capacity. (Structural Frame)
5. Bellwether has consultancy experience with complex organizations, including the facilitation and engagement of stakeholder listening tours, synthesis of data, and communicating findings to stakeholders. (Human Resources Frame)
6. Bellwether's staff are insiders to the education field as former teachers, school administrators, and superintendents. (Human Resources Frame)
7. Bellwether has extensive experience working with mission-aligned business stakeholders and philanthropic funding organizations. (Human Resources Frame)
8. Bellwether's teams are scalable, allowing for diverse district budgetary needs, which create economies of scale. (Structural and Human Resources Frames)
9. Bellwether has experience leveraging organizational insiders as support staff to Bellwether's project teams. (Human Resources Frame)

"We have a lot of folks who have worked in schools in one capacity or another so I think people bring that experience."

Constraints

10. Bellwether currently needs a consistent method of supporting multilingual stakeholder voices.
(Human Resources and Symbolic Frames)
11. Bellwether will be an outsider to most of the districts they support. (Structural and Human Resource Frames)
12. Bellwether's consultancy support costs can exceed \$50,000 per partnership. (Structural Frame)
13. Equity-focused and stakeholder-inclusive listening tours and superintendent entry-planning support require time beyond the customary 100-day period. (Structural Frame)

Key Recommendation

1. Bellwether should leverage an alignment of its mission and affordances with the needs of district partners to successfully engage in equitable listening tours and stakeholder-inclusive entry plans.

Detailed Recommendations: Facilitation

- Support districts for six months, inclusive of two phases: Phase 1 equity-focused listening tours and Phase 2 stakeholder-inclusive entry planning.
- Assist the superintendent with an analysis of their positionality to help them understand their identity within the context of the district they serve and to support diversity, equity, and inclusion.

Detailed Recommendations: Leverage

- Develop economies of scale between district partnerships to reduce service costs.
- Bellwether should leverage its organizational efficiencies of team scalability, remote work capabilities, and the use of local district insiders to reduce project costs.

8.2 Support Question 2

Support Question 2: In what ways do superintendents' needs for the inclusion of stakeholder voices vary based on rural, suburban, or urban school districts or size within the southeast region?

Key Finding 2: Superintendents' needs vary based on regional factors; however, the district's size showed a more significant impact on need, particularly available research and development/communication departments. Additional attributes that lead to a variation of need included superintendent identities (e.g., district insider/outsider), individual background experiences and skills, and access to support networks.

“What I've learned the most is human resources are different in small school districts.”

Detailed Findings:

Regional Factors

1. There are cross-connections of regions within districts; therefore, districts are only sometimes clearly defined by rural, suburban, or urban regional labels. (Structural Frame)

Size

2. The district's size has a more significant impact on superintendent need variation; larger districts are more likely to have Research and Development and Communication Departments or more extensive central office staff. (Structural Frame)
3. Staff within larger districts are more likely to have participated in listening tours/entry plans. These experiences provide contextual knowledge and methodological skills, which require less consultancy support. (Human-Resources Frame)

Additional Attributes

4. Due to the complexity of the superintendency, a network of support is an essential factor in meeting diverse needs. (Human Resources Frame)

5. Superintendent's needs differ based on their position as a district insider/outsider or new/experienced to the superintendency. District insiders possess social capital and know the district context, including political dynamics, history, stories, and symbols. (Political, Structural, Symbolic, and Human Resources Frames)
6. Contextualization is critical in supporting outsider superintendents. (Human Resources and Political Frame)

Key Recommendations:

1. Bellwether will need to contextualize the district by collecting and analyzing district information such as the political landscape, strategic goals, district history/stories, and publicly available data such as student achievement and discipline/attendance.
2. We recommend that Bellwether partner with Superintendent Associations or leverage their district partnerships to create an internal network of support/mentorship. These networks serve as a low-cost service-add, supporting retention and ensuring that Bellwether has an enduring impact beyond their initial partnership.

Detailed Recommendations:**Smaller-Sized Districts**

- We recommend that Bellwether's consultancy model include research and development and communication to support smaller districts.
- Smaller districts are less likely to have engaged in listening tours/entry planning; therefore, they will need training on the methodologies to build background knowledge before engaging in the work.

"I have had to contract out some of the disaggregation of the survey data and the work because we don't have an accountability department that can do that kind of work."

Support Question 3: To what degree do school districts, in a potential partnership with Bellwether, find a return on investment with regard to superintendent training and support for the inclusion of stakeholder voices into 100-day entry plans?

- What financial resources for leadership training exist within rural, suburban, and urban school districts as a market segment for Bellwether?

8.3 Support Question 3

Key Finding 3: Investing in training costs to promote superintendent retention has a higher non-financial and financial return on investment when compared to the adverse effects of superintendent turnover. This return on investment is a critical lever for highlighting the value of training and support, a necessary aspect of receiving school board endorsement.

Detailed Findings:

1. The district will find a return on investment to the degree that the marketing pitch demonstrates its value to the district. (Structural and Symbolic Frames)
 - a. Superintendent turnover has increased post-pandemic, with attrition ranging from 3-5 years for 25% of district superintendents. (Structural and Symbolic Frames)
 - b. Superintendent turnover has a high non-financial cost, including student achievement and the interruption of district goals. (Structural and Human Resources Frames)
 - c. Superintendent turnover has a high financial cost, as recruitment is an expense upward of \$100,000. (Structural Frame)
2. Elements of support for newly appointed superintendents include two phases of partnership opportunity with different funding streams. (Human Resources Frame)
3. Superintendents expressed value in support for listening tours and hesitance regarding consultancy services due to

“So I think that there would be value- I don't know that my community or board would be supportive of that... I kind of call it “we got this”, you know, we're small we got this- it is our own thing.”

expenses and the negative perceptions of the board of education. (Political Frame)

4. Funding is essential due to the fiscal funding cliff (e.g., the expiration of the Elementary and Secondary School Emergency Relief Fund). (Political Frame)
5. Funding justification is essential due to the prevalence and concern for Freedom of Information Act (FOIA) requests. (Political Frame)

Recommendations:

1. Phase 1 partnerships target recruitment firms and school boards, and Bellwether support includes equity-focused and stakeholder-inclusive listening tours.
 - a. Partnerships occur before superintendent selection.
 - b. Two funding avenues include partnering with the district to procure grants or as a school board-approved budgetary expense.
 - i. We recommend that Bellwether seek donors through its network partners to encourage district participation by alleviating financial barriers.
 - ii. Bellwether must create relationships with recruiters and individual school board members. These relationships serve as early adopters for their consultancy support to school districts.
2. Phase 2 partnerships target the superintendent, and Bellwether support includes disaggregating listening tour data to revise and implement 100-day entry plans.
 - a. Phase 2 occurs once a new superintendent assumes the role and after leading the listening tour.
 - b. Funding for phase 2 support comes from superintendents' discretionary funding; this funding ranges from \$25,000 to \$90,000, based on the improvement project-coded interviews.

8.4 Support Question 4

Support Question 4: In what ways are stakeholder voices equitably incorporated into superintendents' listening tours and 100-day entry plans?

Key Finding 4: The equitable inclusion of stakeholder voice into superintendents' listening tours and 100-day entry plans occurs through the intentional incorporation of diversity, equity, and inclusion into the planning, implementation, and tools of the support.

Detailed Findings:

Listening Tours

1. The equitable incorporation of stakeholder voices must include those less visible within the district. (Human Resources Frame)
2. The superintendent communicates value to the community through the order in which the superintendent schedules listening tours. This order transmits political signals to the community and can gain or hinder trust building. (Political and Symbolic Frames)
3. The superintendent communicates value and builds trust by scheduling listening tours in locations that hold significance, feel safe, and are accessible to the local community. (Symbolic Frame)
4. Diversity, equity, and inclusion are words that elicit a strong emotional response, including fear from the superintendents for their job security; such language may be seen as divisive in their districts. (Political Frame)

"I think getting stakeholder feedback and involving them in the process is showing as a leader that you are very open and that you are respectful of history and tradition, but yet you're also going to look for innovation, and you have a vision for the future of what this school district can be."

5. Inclusive listening tours must include multi-lingual support, preferably with community insiders.
(Human Resources Frame)
6. Feedback gathered during listening tours must be transparent and communicated back to the communities; technology and social media are necessary communication tools. (Structural Frame)
7. There needs to be a consistent methodology for capturing listening tour data. (Structural Frame)
8. Diverse neighborhood/community insiders within the district are a trust bridge for superintendent listening tours. (Human Resources and Symbolic Frames)
9. Superintendents must lead, be visibly present, and actively engage in the listening tours through reflective foundational leadership skills (e.g., sense-giving, sensemaking, storytelling, and communication). (Human Resources Frame)

100-Day Entry Plans

10. Meeting with board members early in the entry process builds allies and buy-in for the superintendent's goals and mission. (Political Frame)

Key Recommendations:

1. Bellwether should be aware of stakeholder participation barriers, including the geographic location of schools and neighborhoods in the district.
2. Bellwether should support partners in eliminating barriers through location selection for listening tours aimed at inclusion, ensuring accessibility, and limiting transportation challenges.
3. Listening tour socials provide two functions:
 - a. Sensemaking - to gather stakeholder voices for inclusion within entry plans.
 - b. Sensegiving - to present themselves and their goals and vision for the district.

4. We recommend Bellwether create a cultural and language mapping tool to better understand the political context, including points of political resistance, the demographic make-up of the community served, and comfortable/commonly used language aligned to diversity, equity, and inclusion or alternative words (e.g., representation, access, and opportunity).

Detailed Recommendations

Geography/Tools

- We recommend that Bellwether create and utilize a geographic mapping tool to intentionally highlight geographically distant and underserved communities as a starting point for listening tours. Doing so will communicate the importance of historically lesser included voices within the district.

Settings/Participants/Tools

- Create and utilize a stakeholder mapping tool to ensure the equitable inclusion of all stakeholder voices within the community.
- We recommend listening tour socials set an informal tone (e.g., coffee talks, town hall meetings, and community meetings).
- We recommend inviting news and media outlets to the listening tour socials to build trust, increase visibility, and develop positive public relations with new superintendents.
- Bellwether must be mindful of overrepresentation during listening tours, which could derail equity-focused and stakeholder-inclusive entry plans; stakeholder groups must include the underrepresented and dominant voices.
- Bellwether should leverage the methodologies within its evaluation equity commitments to strengthen and standardize the data collection mechanisms throughout listening tours. This

support is particularly valuable for districts that need a formal Research and Development Department.

CONCLUSIONS

The project's findings and recommendations support a 10-step roadmap for implementing equity-focused listening tours and stakeholder-inclusive entry plans for newly appointed superintendents. The roadmap's design serves as a foundation and reference tool to support Bellwether's development of its consultancy model and marketing pitch tools for partnerships with public school districts. The roadmap steps are fully comprehensive of the improvement project findings and recommendations; we suggest observing the sequencing of the steps as they hold significance in the timeline of the work and use of all roadmap steps, as each element serves an essential function in supporting this work.

Figure 15

10-Step Roadmap for Equity-Focused and Stakeholder-Inclusive Entry Plans



Detailed Roadmap Phases

Step 1: Identify District Partnerships

- Bellwether must engage in a pre-assessment of district partnerships to analyze the district through a power and interest diagram and develop an understanding of its history/stories and context. District contextualization will be vital to the Phase 1 marketing pitch aimed at recruitment firms and school boards. Equally, contextualization is necessary for supporting the superintendent before their listening tour engagement.
- Prior to the Phase 1 marketing pitch, Bellwether should leverage its network of funding partnerships to identify potential grant opportunities, leading with a financial pathway to garner district partnership support.

Step 2: Establish Early Adopter Relationships

- Identify a specific board member or recruitment firm staff to begin the partnership inquiry.
- Prior to the Phase 1 marketing pitch, establish early adopters to support the partnership.



Step 2: Establish Early Adopter Relationships
Board Member & Recruitment Firm Staff



Step 1: Identify District Partnerships
Context Map & Grant/Funding Opportunities

Step 3: Phase 1 Partnership Marketing Pitch

- The phase 1 marketing pitch occurs before the superintendent's hiring; therefore, the first pitch's audience is superintendent recruitment firms and school boards.
- Ensure that the pitch includes the non-financial and financial value to the district; school board approval relates to the demonstration of Bellwether's value proposition.

- The proactive investment in training and support of superintendents has a higher return on investment than the reactive practice of turnover and recruitment.
- Retaining superintendents requires training and support during the entry phase when trust-building occurs; retention is tied to student achievement and ensuring the long-term implementation of district goals.

Step 4: Superintendent Onboarding

- Bellwether must assist the superintendent with district sensemaking, including the district context, history, stories, symbols, political climate, power dynamics, and relational factors.
- Bellwether must support newly incoming superintendents by understanding their positionality within the district.
- While mapping the district, focus on all community members and their geographic locations within the district to ensure inclusive stakeholder listening tours.

Step 5: Support Equity-Focused Listening Tour

- Bellwether's core competencies include context and equity-based listening tours, communicating findings to the community, and implementing stakeholder voice into the superintendent's entry plan through actionable goals.
- Bellwether should leverage its organizational affordances of research and development and organizational change implementation by guiding the superintendent to carry out equity-focused and stakeholder-inclusive listening tours.
- Ensure the inclusion of multi-language team support based on the district's context mapping. Partnering with district community insiders is recommended to leverage established trust-based relationships and encourage stakeholder-inclusive participation.

- Bellwether can utilize listening tour tracking tools, documenting participants and their feedback to ensure equity-focused practices; this will allow the superintendent to lead the tour and focus on sense-giving and sense-making practices aimed at developing district trust.
- Provide reliable methodological collection tools for listening tours, tracking who shared and what was important to them.

Step 6: Data Analysis

- Following the listening tour, Bellwether should utilize its core strengths of data synthesis, disaggregation, and sensemaking into common themes.
- Particular importance should be placed upon including all voices to ensure dominant and non-dominant voices impact the superintendent’s 100-day entry plan.

Step 7: Stakeholder Communication

- Immediate, responsive, and representative community feedback is vital following the analysis of the data.
- Social media tools allow for immediate and responsive community sharing.



Step 7: Stakeholder Communication

Immediate + Responsive + Representative + Social Media Tools



Step 6: Data Analysis

Synthesizing + Disaggregating + Sensemaking



Step 5: Support Equity-Focused Listening Tour

Superintendent Led + District Storytelling + Sensegiving



Step 4: Superintendent Onboarding

Positionality, Listening Tour Tools, & Equitable Identification of Stakeholders, History/Context of District



Step 3: Phase 1 Partnership Marketing Pitch

School Boards & Recruitment Firms - Establish Value to District of Superintendent Support, Positive ROI

Step 8: Phase 2 Partnership Marketing Pitch

- The second opportunity for Bellwether’s district partnerships follows the listening tour and focuses on implementing the findings through 100-day entry plans.
- Superintendents have thresholds of discretionary spending that do not require school board approval, which can serve as a source of financial support.
- Superintendents must provide value for using all discretionary spending; as Phase 1 is school board-approved, the value proposition of implementing Phase 2 services will likely be favorable.

Step 9: Implementation Support

- Bellwether can leverage its Strategic Advising team to integrate the Policy and Evaluation Team’s findings into an actionable 100-day Entry Plan.
- The 100-day Entry Plan should intentionally highlight and publicly share the portions of stakeholder feedback from listening tours.

Step 10: Establish Superintendent Support Network

- As a value-added and low-cost opportunity to create a lasting impact on their district partnerships, Bellwether should create a superintendent support network across their district partnerships.
- These support networks should focus on mentorships and affinity groups aimed at long-term superintendent retention, with a shared base of experience of Bellwether’s stakeholder-inclusive and equity-focused entry plan support.



Step 10: Establish a Superintendent Support Network Long-Term Partnership Impact



Step 9: Implementation Support 100-Day Entry Plan + Stakeholder Informed



Step 8: Phase 2 Partnership Marketing Pitch Superintendents – Discretionary Budget

LIMITATIONS AND RECOMMENDATIONS FOR FURTHER RESEARCH

The improvement project limitations surround timing, sample size, the exclusion of urban superintendent interviews, availability of a national database tracking superintendent turnover, and generalizability. The project timeline coincided with the beginning of the academic school year, which impacted superintendent availability and participation. The project initially aimed at interviewing 12-16 superintendents; however, five superintendents responded to our interview inquiry. The snowball sampling method utilized for superintendent interviews did not afford the inclusion of urban superintendents within the Southeast region. Throughout the literature review on the financial return on investment of superintendent training and support, we identified multiple sources citing the lack of and need for a national database that tracks superintendent turnover. Therefore, identifying turnover rates primarily came from the lived experiences of recruitment firms as cited within national articles and several research articles confirming the lack of available data and the complexity of garnering this information. The project focused on superintendents within the Southeast region of the United States in 2023. In citing or considering the findings of this project, generalizability must be considered concerning regional differences and rapidly shifting political climates.

Figure 16

Project Limitations

Our project team suggests the following areas for further research surrounding the need for supporting superintendents during their entry into a district.

- A national database tracking superintendent turnover and its non-financial and financial impacts on school districts.

Project Limitations

- 1 Interview **Timing** and **Availability** of Superintendents - **Start of School Year**
- 2 Superintendent **Sample Size** and Representation of **Urban Districts**
- 3 Lack of a **National Database** Measuring Superintendent Turnover
- 4 Generalizability - **Regional Differences** & Rapidly **Shifting Political Climates**

- A focus on female superintendent turnover, as post-pandemic factors have impacted replacement by male applicants on an already underrepresented district leadership demographic.
- Consistent, equitable, and commonly used methodologies of stakeholder listening tours to ensure the inclusion of underrepresented groups.

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APPENDIX**Appendix A**

Term Definitions

Diversity	Varied traits and perspectives in the educational context.
Equity	Fairness and equal access in the educational context.
Inclusion	Valuing and involving all stakeholders in the educational context.
DEI in Entry Planning	Equity in entry planning ensures that all stakeholders have equitable access to the planning process, information, and opportunities for input. Enabling an inclusive environment where diverse perspectives are valued and considered leads to well-rounded and informed entry plans.
Stakeholder Voice	Actively seeking and incorporating input, insights, and perspectives from multiple individuals and groups, ensuring a broad range of viewpoints informs entry plans.
Listening Tour	Leaders actively engage with stakeholders to gather insights, concerns, and feedback. These tours facilitate understanding, build relationships, and inform decision-making, enabling leaders to craft effective strategies and prioritize actions that align with stakeholder needs.
Entry Planning	Strategic frameworks for incoming superintendents.

Appendix B

Entry Activities Timeline

The following table is based on Cheatham et al., 2022, p. 204-205

Phases/Steps	Products to Develop/Deliverables
Phase 1: Pre Entry	
Step 0: Reflect on self and context	<ul style="list-style-type: none"> ● Key talking points
Phase 2: Listening and Learning	
Step 1: Set goals and introduce yourself	<ul style="list-style-type: none"> ● Entry letter ● Entry goals and rationale
Step 2: Gather data through engagement	<ul style="list-style-type: none"> ● Interview inquiry questions and protocol ● Interview plan/calendar
Step 3: Share in sensemaking	<ul style="list-style-type: none"> ● Data analysis process ● Data overviews
Step 4: Communicate	<ul style="list-style-type: none"> ● Presentation and report ● Analysis of deficit vs. strengths-based language
Phase 3: Action Planning	
Step 5: Plan to act	<ul style="list-style-type: none"> ● List of people involved in action planning ● Description of product in action planning ● Description of new community behaviors
Self and communal care throughout	<ul style="list-style-type: none"> ● Scheduled care actions

Appendix C

Listening Tour Sample Questions (Cheatham et al., 2022, p. 95)

Cheatham et al., 2022 suggest “a good starting point is to ask a question about strengths, a question about challenges, and a question about opportunities. The key is to write big, open-ended questions.

- What are the organization’s most significant strengths? What would you want to see unchanged or amplified? Why?
- What are the organization’s most significant challenges? What would you want to see changed or discontinued? Why?
- What are the ripest opportunities for progress? What would you want to see the organization start doing immediately, a year from now, three years from now? Why?”

Appendix D

Listening Tour Sample Questions (Jentz, 2012, p. 22-23)

The following questions are adapted based on the audience.

1. We will begin with a brief autobiographical sketch of yourself, including what you think I should know about you.
2. What is the key issue for your work in your classes and the building?
3. What changes are necessary to provide the best education possible for our students? Rank order them for me. What do you want your role to be in making these changes? What practices do we need to preserve to ensure our continued effectiveness with children?
4. Describe a time when the school was in conflict. How did it arise? How was the conflict resolved? How could it have been handled and resolved better?
5. Describe an incident with a student that illustrates your greatest professional strength.
6. What about your job depletes your energy?
7. What network of staff members do you consult with in your effort to provide instruction to students?
8. Describe your beliefs concerning how parents should be involved with the schools.
9. What questions do you wish I had asked because of their significance to you and/or the school?

Note: Adapted questions are available for the Superintendent to the School Board (p. 48), Central Office (p. 49), Administrators (p. 50), Teachers Association (p. 51), and Community Members (p. 51-52).

Appendix E

Data Collection Matrix

Data Collection Matrix			
<p>Primary Project Question: What support elements are necessary for newly appointed superintendents to ensure the inclusion of stakeholder voice within 100-day entry plans in alignment with Bellwether’s mission and organizational capacity?</p>			
Project Supporting Questions	Data Source	Interview Questions	Rational
<p>Supporting Question 1</p> <p>To what extent do Bellwether’s organizational mission, affordances, and constraints support the development of a consultancy model/marketing pitch to support superintendents with 100-day entry plans?</p>	<p>Existing Literature</p> <p>Bellwether’s existing pitch decks, project proposals, and annual report</p> <p>Bellwether’s Staff Interviews</p>	<p>When you think of the terms diversity, equity, and inclusion, what concepts are most important to Bellwether as an organization? (Structural Question)</p> <p>When you think of 100-day entry planning, how is this conceptualized within the Bellwether organization? (Structural Question)</p> <p>When you think of stakeholder listening tours, how is this conceptualized within the Bellwether organization? (Structural Question)</p> <p>What other terms or concepts are most important to Bellwether’s organizational mission and goals in working with this new market segment of newly appointed superintendents and would be important to define within this work? (Structural Question)</p> <p>Bellwether’s goals for the new market segment of incoming superintendents</p> <p>Tell us about Bellwether’s goals for working with superintendents from the creation to implementation of 100-day entry plans. (Descriptive Question)</p> <p>Can you draw a timeline of critical milestones in developing a consultancy model to support superintendents in 100-day entry plans? (Task-Related Grant Tour Questions)</p> <p>Organizational Affordances- What are the affordances within Bellwether’s organization to support the work of integrating stakeholder voice in superintendent entry planning?</p> <p>Tell about your experiences engaging in entry planning/ entry planning consultation. (Descriptive Question)</p> <p>In what ways might Bellwether’s organizational capacity play a role in facilitating the inclusion of stakeholder voices in entry planning? (Grand Tour)</p> <p>Tell us about a time when you experienced stakeholder listening tours. (Task-Related Grand Tour)</p>	<p>An assessment of the quality elements within marketing pitch decks.</p> <p>An assessment of the use of pitch decks in Bellwether’s current consultancy practice.</p> <p>An assessment of Bellwether’s organizational capacity, to support the development of a pitch deck for district superintendents.</p>

<p>Supporting Question 2</p> <p>In what ways do superintendents' needs for the inclusion of stakeholder voices vary based on rural, suburban, or urban school districts or size within the southeast region?</p>	<p>Existing Literature</p> <p>Rural, Suburban, and Urban Superintendent Interviews</p>	<p>In what ways do superintendents' needs for the inclusion of stakeholder voices vary based upon rural, suburban, or urban school districts or size within the southeast region?</p> <p>When you assumed this position, what were your needs as an incoming superintendent in regard to the creation of your 100-day (entry) plan? Tell us about this experience. (Grand Tour Question)</p> <p>What are the resources or supports you would need to engage in and utilize stakeholder listening tours? (Structural Question) Research department? Communication?</p>	<p>The needs of stakeholders vary based on districts' size and geographic location.</p> <p>The availability and topics of training and support differ by district region and training program.</p> <p>Informing Bellwether of market segment needs for use in its consultancy model.</p> <p>An assessment of the availability and prevalence of DEI training for educational leadership.</p>
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<p>Supporting Question 3</p> <p>To what degree do school districts, in a potential partnership with Bellwether, find a return on investment with regard to superintendent training and support for the inclusion of stakeholder voices into 100-day entry plans?</p> <ul style="list-style-type: none"> • What financial resources for leadership training exist within rural, suburban, and urban school districts as a market segment for Bellwether? 	<p>Existing Literature</p> <p>Rural, Suburban, and Urban Superintendent Interviews</p>	<p>What value, if any, would you find in engaging stakeholder voices at the start, as a new superintendent? (Structural Question)</p> <p>Explain the value your district might find by investing in support for superintendent listening tours and the integration therein of stakeholder voices in hundred-day entry plans. (Structural Question)</p> <p>What are potential funding streams you might pursue for consultancy work in your district? (Specific Grand Tour)</p> <p>How did this vary in your experiences as superintendent (by type- rural, urban, suburban- district size, or geographic location) (Contrast Question)</p> <p>Who is the primary decision maker in the allocation of funds for leadership training support in your district?</p> <p>What strategic business partnerships does the district have within the local community, for example, the local chamber of commerce?</p>	<p>A return on investment for districts is inherent in high-quality superintendent training and support and the limitation of turnover.</p> <p>Stakeholder voice improves entry plan quality.</p> <p>An assessment of the organizational structure of geographically diverse districts.</p>
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<p>Supporting Question 4</p> <p>In what ways are stakeholder voices equitably incorporated into superintendents' listening tours and 100-day entry plans?</p>	<p>Existing Literature</p> <p>Rural, Suburban, and Urban Superintendent Interviews</p>	<p>When you think of hundred-day entry planning, how is this conceptualized by you? (Structural Question)</p> <p>When you think of hundred-day entry planning, how is this conceptualized by you? (Structural Question)</p> <p>When you think of stakeholder listening tours, how is this conceptualized by you? (Structural Question)</p> <p>Tell us about your experience and/or any training engaging in diversity, equity, and inclusion. (Descriptive Question)</p> <p>Did you engage in a stakeholder listening tour? If so, tell us about the listening tour with as much detail as you recall, including the format. (Grand Tour Question)</p> <p>If you engaged in a stakeholder listening tour, in what ways did you incorporate stakeholder voice into your hundred-day (entry) plan? (Specific Grand Tour Question)</p>	<p>An assessment of the use of listening tours as a mechanism for including stakeholder voices.</p> <p>An assessment of the incorporation of stakeholder voice into 100-day entry plans.</p>
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Appendix F**Bellwether Document Review Protocol and Codebook**

The document review consisted of a three-stage plan. We began with a first pass, organizing our documents. On the second pass, we skimmed the documents for themes using our codebook. Then, we organized the citations by themes. On the third pass, we organized the themed citations by research questions, and we triangulated these themes with our conceptual frame, literature review, and interviews.

Bellwether Document Review Codebook
Affordances and Capacity
Capacity
Methodologies
Alignment with mission and organizational values and Equity Commitments
Funding

Appendix G

Bellwether Interview Protocol and Codebook

Primary Question: What support elements are necessary within Bellwether’s organizational capacity, for newly appointed U.S. district superintendents in the southeast region to ensure the equitable inclusion of stakeholder voice within 100-day entry plans?

Bellwether

Support Question 1

To what extent do Bellwether’s affordances, constraints, and organizational mission support the development of a consultancy framework/ pitch to support superintendents with 100-day entry plans?

- What are the effective elements of a pitch deck to garner buy-in from all superintendents for a partnership with Bellwether? to include stakeholder voice into 100-day entry plans?

Interview with Bellwether opening

Good (morning, afternoon, evening), and thank you for taking the time to meet with us today. My name is Beth, and my team members are Danielle and Elizabeth. As you know from previous communication, my colleagues and I are doctoral candidates at Vanderbilt University working in partnership with Bellwether to determine needs and abilities to draft a pitch deck for a service in which Bellwether supports incoming superintendents in engaging and integrating stakeholder voice in their entry planning.

For today’s purpose, we are focused on our question related to Bellwether’s capacity: ***To what extent do Bellwether’s affordances, constraints, and organizational mission support the development of a consultancy framework/ pitch to support superintendents with 100-day entry plans?***

We will begin by asking you to define several terms central to our partnership to ensure continuity throughout this improvement project.

All participants will be kept anonymous, and identifying details will remain confidential. Please provide as much detail as you can in your responses:

Interview Questions:

Central Terms- What are the terms central to this work?

1. *When you think of diversity, equity, and inclusion, what concepts are most important to Bellwether as an organization? (Structural Question)*
2. *When you think of 100-day entry planning, how is this conceptualized within the Bellwether organization? (Structural Question)*
3. *When you think of stakeholder listening tours, how is this conceptualized within the Bellwether organization? (Structural Question)*
4. *What other terms or concepts are most important to Bellwether's organizational mission and goals in working with this new market segment of newly appointed superintendents and would be important to define within this work? (Structural Question)*

Bellwether's goals for the new market segment of incoming superintendents

5. *Tell us about Bellwether's goals for working with superintendents from the creation to implementation of 100-day entry plans. (Descriptive Question)*
6. *Can you draw a timeline of critical milestones in developing a consultancy model to support superintendents in 100-day entry plans? (Task-Related Grant Tour Questions)*

Organizational Affordances- What are the affordances within Bellwether's organization to support the work of integrating stakeholder voice in superintendent entry planning?

7. *Tell about your experiences engaging in entry planning/ entry planning consultation. (Descriptive Question)*
8. *In what ways might Bellwether's organizational capacity play a role in facilitating the inclusion of stakeholder voices in entry planning? (Grand Tour)*
9. *Tell us about a time when you experienced stakeholder listening tours. (Task-Related Grand Tour)*

**If the interviewee doesn't have experiences with entry planning (# 7) and stakeholder listening tours (#8): Tell us about your experiences working with superintendents in the past and in what/which initiatives. (Descriptive question)*

10. *What is Bellwether's **data collection capacity** to support superintendent listening tours and inclusion in entry planning? (Task-Related Grand Tour)*

11. What **existing proposals** and **cost structures** could be repurposed and generalized to meet this new client service?

Organizational Constraints

What are some potential challenges or constraints for Bellwether's capacity to support incoming superintendents with their inclusion of stakeholder voice in 100-day entry plans?

12. What are the **constraints** of Bellwether personnel in facilitating the entry plan?

Pitch deck practices within the organization

13. What are the effective elements of a pitch deck to garner buy-in from all superintendents for a partnership with Bellwether to include stakeholder voice into 100-day entry plans? (Example Question)
14. What are commonly provided pitch deck components? (Example Question)
15. What commonly provided pitch deck components have been effective? Why? (Mini Tour Question)

Interview with Bellwether closing

We thank you sincerely for the contributions you have made and the information you have shared and illuminated today. Is there anything further you want to add or clarify regarding Bellwether's affordances or constraints in supporting superintendents as they integrate stakeholder voices within their entry planning?

Please do not hesitate to reach out should you have anything further to share with our team. Thank you again for your time.

Pre-Interview Email Communication

Dear X,

Thank you again for taking the time to meet with our team today. We look forward to meeting with you to discover more about Bellwether's affordances and constraints while supporting superintendents in integrating stakeholder voices within entry plans. Our meeting time today is at X, and we plan on interviewing in 45 minutes. We will be using the Otter.AI application to transcribe the interview. We will share this transcript with you for your review. Please use the following link to join our interview:

Post-Interview Email Communication

"Vanderbilt Interview Follow-Up"

Dear X,

Thank you for taking the time to participate in an interview with our team.

Please find the attached transcript for your review. If you have any questions, concerns, clarification, or further input, please contact our team. Our next step will be to code these transcripts to support the findings of our improvement project partnership.

Take good care,
Beth, Elizabeth, and Danielle

Bellwether Interviews Codebook
Affordances and Capacity
Capacity
Constraints
Methodologies
Desires for Product
Alignment with mission and organizational values and Equity Commitments
Terms
Pitch Decks and Current Practices
Funding

Appendix H

Superintendent Interview Protocol and Codebook

Interview with Superintendent Opening

Good (morning, afternoon, evening), and thank you for taking the time to meet with us today. My name is Beth, and my team members are Danielle and Elizabeth. As you know from previous communication, my colleagues and I are doctoral candidates at Vanderbilt University working in partnership with an organization to determine the needs of incoming superintendents for the inclusion of equitable stakeholder voice in 100-day entry plans.

For today's purpose, we are focused on **three ideas** related to supporting incoming superintendents in engaging in stakeholder listening tours and 100-day entry plans, including.

- (1) Variation of need based upon region/type of school districts
- (2) District Return on Investment for Leadership Training
- (3) Equitable incorporation of stakeholder's voice into superintendents' 100-day entry plans

We will begin by asking you to talk about your experience(s) as an incoming superintendent and then define several central terms to ensure continuity throughout this improvement project.

All participants will be kept anonymous, and identifying details will remain confidential. Please provide as much detail as you can in your responses.

Interview Questions

1. *Let's begin by framing your **experience** as an incoming superintendent. Please help us to understand the type of district(s) you lead or have led within the southeast region, such as: (Descriptive Question)*
 - *Whether it was rural, urban, suburban*
 - *Size*
 - *Geographic location*

Central Terms- What are the terms central to this work?

2. *When you think of the terms **diversity, equity, and inclusion**, what concepts are most important to you? (Structural Question)*

3. *When you think of **100-day entry planning**, how is this conceptualized by you? (Structural Question)*
4. *When you think of **stakeholder listening tours**, how is this conceptualized by you? (Structural Question)*
5. *Tell us about your **experience and/or any training** engaging in diversity, equity, and inclusion. (Descriptive Question)*

Supporting Question 4

In what ways are **stakeholder voices** equitably incorporated into superintendents' **listening tours and 100-day entry plans**?

6. *Did you engage in a **stakeholder listening tour**? If so, tell us about the listening tour with as much detail as you recall, including the format. (Grand Tour Question)*
7. *If you engaged in a stakeholder listening tour, in what ways did you **incorporate stakeholder voice** into your 100-day (entry) plan? (Specific Grand Tour Question)*

Supporting Question 2

- In what ways do superintendents' **needs** for the inclusion of stakeholder voices **vary** based on rural, suburban, or urban school districts or size within the southeast region? (**Variation in need**)
8. *When you assumed this position, what were your **needs** as an incoming superintendent regarding the creation of your 100-day (entry) plan? Tell us about this experience. (Grand Tour Question)*
 9. *What are the **resources or supports** you would need to engage in and utilize stakeholder listening tours? (Structural Question)*
 - i. *Research department? Communication?*

Supporting Question 3

To what degree do school districts, in a potential partnership with the organization, find a **(return on investment)** with regard to superintendent training and support for the inclusion of stakeholder voices into 100-day entry plans?

- What financial resources for leadership training exist within rural, suburban, and urban school districts as a market segment for the organization?
10. *What **value**, if any, would you find in engaging stakeholder voices at the start as a new superintendent? (Structural Question)*
 11. *Explain the **value** your district might find by investing in support for superintendent listening tours and the integration therein of stakeholder voices in 100-day entry plans. (Structural Question)*

12. What are **potential funding streams** you might pursue for consultancy work in your district?
(Specific Grand Tour)

- How did this **vary** in your experiences as superintendent (by type- rural, urban, suburban-district size, or geographic location) (Contrast Question)
- Who is the **primary decision maker** in allocating funds for leadership training support in your district?
- What **strategic business partnerships** does the district have within the local community, for example, the local chamber of commerce?

Interview with Superintendent closing

We thank you sincerely for your contributions and the information you have shared and illuminated today. Is there anything further you want to add or clarify regarding supporting superintendents as they integrate stakeholder voices within their entry planning?

Next, we will email you a copy of your transcript to review and provide any feedback on your answers to the questions.

Please do not hesitate to reach out should you have anything further to share with our team. Thank you again for your time.

Pre-Interview Email Communication

Dear X,

Thank you again for taking the time to meet with our team today. We look forward to meeting with you to discover more about supporting superintendents in integrating stakeholder voice within 100-day entry plans.

Our meeting time today is at X, and we plan on interviewing in 60 minutes. We will be using the Otter.AI application to transcribe the interview. We will share this transcript with you for your review. Please use the following link to join our interview:

Post-Interview Email Communication

“Vanderbilt Interview Follow-Up”

Dear X,

Thank you for taking the time to participate in an interview with our team.

Please find the attached transcript for your review. Please contact our team with any questions, concerns, clarification, or further input. Our next step will be to code these transcripts to support the findings of our improvement project partnership.

Take good care,
Beth, Elizabeth, and Danielle

Superintendent Interviews Codebook
Phases of Entry Planning/ Support
Power and Position
Strategic Partnerships
Listening Tours Inclusions
Diversity, Equity, and Inclusion
Funding
Needs (Rural, Suburban, Urban)
Listening Tours Methodologies
Communication
Value/ ROI / Perceptions

Appendix I

Data Analysis Matrix

Data Analysis Matrix			
<p>Primary Project Question: What support elements are necessary for newly appointed superintendents to ensure the inclusion of stakeholder voice within 100-day entry plans in alignment with Bellwether’s mission and organizational capacity?</p>			
Project Supporting Questions	Data Source	Data Collection Method (s)	Data Analysis Procedures
<p>Supporting Question 1 To what extent do Bellwether’s organizational mission, affordances, and constraints support the development of a consultancy model/marketing pitch to support superintendents with 100-day entry plans?</p>	<p>Existing Literature</p> <p>Bellwether’s Internal Documents</p> <p>Bellwether’s Staff Interviews</p>	<p>Webiste Review and Focus Groups</p> <p>Document Review</p> <p>Bellwether Staff Interviews</p>	<p>Analysis of the organizational documents and publicly available information to identify themes (Reconcile Findings)</p> <p>Thematic Coding – Deductive Coding (Bellwether Documents)</p> <p>Thematic Coding – Deductive and Inductive (Bellwether Interviews)</p>
<p>Supporting Question 2 In what ways do superintendents’ needs for the inclusion of stakeholder voices vary based on rural, suburban, or urban school districts or size within the southeast region?</p>	<p>Existing Literature</p> <p>Rural, Suburban, and Urban Superintendent Interviews</p>	<p>Literature Review</p> <p>Superintendent Interviews</p>	<p>Synthesis of existing research</p> <p>Thematic Coding – Deductive and Inductive</p>
<p>Supporting Question 3 To what degree do school districts, in a potential partnership with Bellwether, find a return on investment with regard to superintendent training and support for the inclusion of stakeholder voices into 100-day entry plans?</p> <ul style="list-style-type: none"> • What financial resources for leadership training exist within rural, suburban, and urban school districts as a market segment for Bellwether? 	<p>Existing Literature</p> <p>Rural, Suburban, and Urban Superintendent Interviews</p>	<p>Literature Review</p> <p>Superintendent Interviews</p>	<p>Synthesis of existing research</p> <p>Thematic Coding – Deductive and Inductive</p>
<p>Supporting Question 4 In what ways are stakeholder voices equitably incorporated into superintendents’ listening tours and 100-day entry plans?</p>	<p>Existing Literature</p> <p>Rural, Suburban, and Urban Superintendent Interviews</p>	<p>Literature Review</p> <p>Superintendent Interviews</p>	<p>Synthesis of Existing Research</p> <p>Thematic Coding – Deductive and Inductive</p>