SERVING
THE WHOLE
PERSON

An Alignment and Coherence Guide
for Local Education Agencies

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ACKNOWLEDGMENTS

INTRODUCTION

To Advance Equity, Districts and Schools Must Serve the Whole Person

Educators in K–12 school systems are increasingly acknowledging the importance of serving the "whole person" as an essential foundation for achieving equitable outcomes. They understand that students' learning and development must include not only their cognitive development but also their physiological, social, and emotional development. These interrelated developmental needs inform the conditions that educators find they must create in schools, for students as well as for the adults who care for them.

The quality of the conditions in a school can be observed in its relationships and environments. When relationships are responsive and when environments are safe, supportive, and equitable, students develop a greater sense of agency, identity, and belonging, which enables high-quality instruction that leads to positive and equitable outcomes. When serving the whole person, adults honor students' experiences, see their worth, and hold high expectations for their futures. Families feel welcome and valued at school, and educators feel that their work is meaningful and supported. Indeed, the right conditions in schools can provide an essential foundation for individual and community well-being, and can create fertile ground for every student to succeed at high levels — academically, socially, and emotionally.

The Need for Alignment and Coherence

State education agencies (SEAs) and local education agencies (LEAs) often employ a wide variety of initiatives and programs designed to create such conditions for student success. Although those initiatives may be evidence-based, they often fail to achieve desired outcomes, in part because they operate in fragmented or uncoordinated siloes that create barriers to effective implementation (Center to Improve Social and Emotional Learning and School Safety, 2019). This challenge manifests in three ways:

The definitions, boundaries, and relationships among social and emotional learning (SEL), school safety, and other whole-person initiatives are often unclear, resulting in misaligned efforts that may work at cross-purposes with one another. For example, related initiatives may go by a variety of names or may be

categorized in different ways, such as SEL, character education, 21st-century skills, school-based mental health, trauma-informed practices, school climate, or school safety. Without a common language, the risk of miscommunication — and, therefore, the risk of ineffective implementation — increases significantly.

Disparate whole-person initiatives sometimes lack the coordination that would ensure that they are all working toward one shared, overarching vision for learning, development, and success for students. Leaders see this misalignment and incoherence internally, within their own agencies, as well as vertically, between SEAs and the LEAs in their own states, and horizontally, with other child- and youth-serving agencies and community-based organizations. For example, related initiatives may be housed in different parts of an agency, funded in entirely different ways, described using different terms or frameworks, and/or evaluated using varying measures of success. This misalignment and incoherence may result in efforts that are duplicative at best or conflicting at worst.

Finally, when whole-person work is misaligned or incoherent, education leaders struggle to communicate clearly and compellingly about the work in ways that reflect the values and aspirations of a wide array of stakeholders. Strategic communication is important for building awareness, engagement, and commitment for serving children and youth. When this communication is bidirectional, it also creates avenues for leaders to receive timely, honest feedback from stakeholders about the effectiveness of this work.

Misalignment and incoherence can lead to negative consequences. Leaders may find themselves managing whole-person initiatives that are redundant, poorly integrated, and/or competing for limited resources. With an incoherent set of demands placed on them, teachers may feel overwhelmed or abandoned in finding the right solutions to meet their students' unique needs. And, as a result, students — who need and deserve dedicated whole-person development — may not have access to the right supports for their needs. Fortunately, we can all do better for these stakeholders.

Alignment and Coherence as a Strategy to Better Serve the Whole Person and Advance Equity

When systems are aligned and coherent, whole-person initiatives work in concert to achieve their intended goals. Greater alignment and coherence begins with a unified vision for serving the whole person — one that stakeholders at every level of the system understand and can engage with. Further, the portfolio of whole-person initiatives should appropriately and equitably address all three types of conditions for learning and development: personal, school, and system.

This document uses the following definitions of key terms:

Key Term	Definition
Alignment	*Alignment* refers to all policies, practices, processes, and roles in a system working together in similar or consistent ways. Think of a jigsaw puzzle. Alignment describes how each of the pieces fit together.
Coherence	*Coherence* refers to integration and interconnection between the parts of the system, in a way that mutually reinforces shared understanding and overall progress toward a clear vision and set of goals. Using the analogy above, coherence describes the full, recognizable picture that the puzzle pieces create.

This guide's central purpose is to help LEA, leaders implement conditions for equitable learning and development for students, families, and educators, through their work to improve the alignment and coherence of their whole-person initiatives. (This guide uses the term "initiatives" as a catch-all phrase to refer to the programs, strategies, policies, and other efforts that LEAs and their cross-sector partners may employ to serve the whole person in their districts.)

The guide is based on the idea that equitable outcomes are more likely to result when whole-person initiatives are implemented in an aligned and coherent way. With this guide, leaders will:

1. Understand what serving the whole person means, and how this work can contribute to equitable outcomes for students, their families, and their communities.

2. Connect their district or school whole-person initiatives to a broader vision for whole-person outcomes.

3. Tailor the implementation of whole-person initiatives so that they are more aligned and coherent.

4. Communicate — in a clear and compelling way — about why and how their district or school serves the whole person.

A DISCUSSION OF KEY CONCEPTS

This guide includes three key concepts:

- The Whole Person
- Conditions for Equitable Learning and Development
- Equity

The Whole Person

The concept of the "whole person" refers to a comprehensive notion of human development that includes several domains, such as physiological, cognitive, social, and emotional development. The early childhood field includes two additional domains: language development and "general" learning, which refers to skills, mindsets, and "approaches to learning" (Head Start Early Childhood Learning & Knowledge Center, n.d.). Science shows that these domains develop together, and that health and well-being in one domain bolster the health and well-being of the others (Cantor et al., 2018). Moreover, integrated approaches to learning result in improved academic and other outcomes (Durlak et al., 2011; Carneiro et al., 2007). Further, when whole-person efforts are tailored to students' strengths, aspirations, and needs, students can develop and learn to their full potential, regardless of their background.
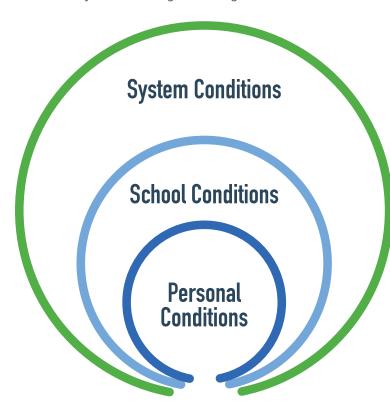
In this way, serving the whole person promotes the following general outcomes:

Personal Purpose • Healthy Relationships • A Sense of Place in the Community • Success in School and the Workplace • Engaged Citizenship

Every adult with a meaningful relationship to a student has a role to play in achieving these outcomes. This includes families and caregivers, educators, faith leaders, health and mental health providers, and other adults with a recurring role in a student's community. Next to families, educators and schools play the most pivotal role in promoting or inhibiting positive outcomes for students, with the most impactful, consistent, and potentially close relationships with the students in their care.

Conditions for Equitable Learning and Development

The work of putting conditions in place for learning and development is foundational to effective teaching and learning that helps *all* students learn at high levels. Drawing from ecological models of development (Bronfenbrenner & Morris, et al., 2006; Garcia Coll et al., 1996; Lerner, 1991), the conditions for equitable learning and development can be organized into three categories, as illustrated by the following Venn diagram:

Personal Conditions. Personal conditions for learning and development are those that bolster and ensure health and well-being *within individuals* in school communities — students and the adults who care for them. These conditions include social and emotional health and well-being, as well as physical, mental, and behavioral health.

School Conditions. School conditions for learning and development are those that foster a strong climate and culture *across the school building.* These include safety, connectedness, and belonging. School conditions for success foster responsive, reliable relationships among individuals and groups, such as students, educators, and families. Such relationships promote resilience, provide protective factors that reduce the impacts of chronic or acute stress, and create environments in which every person and the school community as a whole can thrive.

System Conditions. Of course, schools do not operate in a vacuum. System conditions for learning and development are those *beyond the direct control of the school* that nevertheless affect the health and well-being of the individuals in school communities. Alignment and coherence should extend across every level of the system — from classrooms to the state — and across all child- and youth-serving agencies, including health, mental health, justice, child welfare, and anti-poverty agencies. Therefore,

systems conditions include the policies, funding, and other supports provided by SEAs and LEAs, as well as the collaboration that may happen among SEAs, LEAs, and other child- and youth-serving organizations and agencies. Collaboration with these partners can accelerate schools' positive influence over the development and well-being of students and families.

Equity

Equitable experiences promote equitable outcomes. There are many ways to conceptualize equity. The Center for the Study of Social Policy describes work toward equity as acknowledging "unequal starting places and the need to correct imbalance" (2019, p. 5). As one thought leader focused on coaching for equity, Erin Trent Johnson, founder and CEO of Community Equity Partners, puts it: "In order to operationalize and achieve equity, social outcomes must no longer be predicted by race, class, and gender. To do this, we must acknowledge and examine power structures, including systemic advantage and disadvantage that hold inequities in place."

To disrupt this imbalance of power and to foster greater equity, this guide suggests that local leaders consider strategies and approaches such as:

1. Engage and listen to teachers, students, and families *first*, before taking action.

2. Adopt strengths-based approaches to planning, decision-making, and communicating.

3. Embrace the values, histories, and relationships that are already present in the communities you serve.

4. Promote collaboration with students, families, and communities by co-designing, co-implementing, co-leading, and co-governing initiatives.

5. Through inquiry and reflection, illuminate and disrupt the implicit and explicit biases that may be held by those in positions of power.

6. Through data collection and analysis, illuminate and disrupt organizational and structural inequities that may be found in the policies and practices at every level of the system.

7. Help children claim their power and lift up their communities.

PREPARE TO USE THE ALIGNMENT AND COHERENCE GUIDE

The purpose of this section is to ensure that your team is prepared to effectively implement this guide. In this section, you will:

- Gain a clear understanding of the sequence of activities in this guide and how it can support your LEA's work toward alignment and coherence of whole-person initiatives.
- Identify the initial team and facilitator(s) who will lead implementation of this process.
- Convene an initial meeting to orient your team to this guide, to identify the scope of your alignment and coherence efforts, and to assess your overall readiness to lead the alignment and coherence process.

Big Picture: Recommendations to Consider

As your team prepares for this work, this guide offers six important recommendations to ensure that your work toward alignment and coherence is as effective as possible:

- **Clarify your "why."** As your team embarks on using the guide, you should begin with a thorough conversation about why you are embarking on this alignment and coherence work. When teams share an understanding of both what this work can achieve and how it fits with other ongoing key strategic efforts, collaboration moves forward more efficiently and effectively.
- **Adapt the guide.** There are many different entry points for this work. Your team may choose to adjust the process outlined in this guide to meet your own needs and to integrate with your existing work. Your team may also work more quickly or more slowly than the guide indicates, depending on where additional work is needed. For example, your district and its school leaders may have done some of the foundational thinking and planning that supports an activity, such as including student and stakeholder voice in annual planning, which can help quickly surface the student strengths, needs, and aspirations that are outlined in Chapter 1. However, if your district does not have this thinking and planning in place, you may need to conduct additional work during work on this chapter and at other times.

- **Engage leaders.** As with any systemic change, the support of key leaders will be essential to this work. Your team should seek their guidance and advocacy frequently and consistently.

- **Communicate transparently.** Keep key stakeholders informed about how your team's work toward greater alignment and broader coherence benefits students, their families, and educators. (See Chapter 6 for more on how strategic communication can support this work.)

- **Work with other approaches and frameworks.** This tool supplements — rather than supplants — other approaches and/or tools for facilitating alignment and coherence. Tailor the guide to work with your existing frameworks. For example, there are several widely used "three-tiered" frameworks, such as Multi-Tiered Systems of Support (MTSS), Positive Behavioral Interventions and Supports (PBIS), and Response to Intervention (RTI). At key decision points in this process, you can consult these frameworks to ensure that your alignment and coherence work considers their guidance and incorporates it where relevant and appropriate.

- **Use data.** Finally, your team should use data to inform your thinking. Data sources can include surveys, focus groups, and interviews with your district's students, families, educators, and community, as well as academic, social, emotional, behavioral, and other data collected across your district.

Looking Ahead: Sequence of Activities

This guide includes six chapters:

- **Chapter 1.** Identify the Strengths, Needs, and Aspirations of Your Students
- **Chapter 2.** Describe How These Strengths, Needs, and Aspirations Inform Your Vision for Serving the Whole Person in Your District
- **Chapter 3.** Identify a Focus Area for Coherence
- **Chapter 4.** Tailor the Implementation of Your Whole-Person Initiatives for Alignment With Your Focus Area
- **Chapter 5.** Create an Action Plan
- **Chapter 6.** Plan for Strategic Communication That Reinforces the Work

Each chapter in the guide includes these components:

- **Purpose.** Each chapter starts with an overview of the chapter and orients the work within the larger alignment and coherence process.
- **Activity or Activities.** Each chapter provides directions and tools for activities designed to be completed collaboratively by your team.
- **Hypothetical Responses.** To help your team envision how you might proceed through the guide, each chapter includes responses from a hypothetical district in green italics.
- **Reflection.** Each chapter concludes with reflection questions for the team about the process.

Form Your Team

The potentially large scope and complexity of alignment and coherence work calls for a team made up of individuals from across departments and initiatives, who have and represent different expertise, lead relevant bodies of work, and can help carry information and insight from the work back to others. With the right leaders and colleagues on the team, the potentially daunting process of improving alignment and coherence will be not only more manageable, but also more meaningful and effective.

Who to Include

Begin by forming a team to guide this work. Ideally, form a team across divisions and departments in your district, which will invite new collaboration in service of aligning whole-person initiatives. Start by listing the departments, agencies, or organizations focused on whole-person initiatives:

Participant List Template

Initiative	Department, Agency, Organization, or Stakeholder Group	Participant(s)

For example, a hypothetical district might fill out the chart this way:

Initiative	Department, Agency, Organization, or Stakeholder Group	Participant(s)
Chronic absenteeism	*Operations & Administrative Division*	*Jane Smith*
21st-century standards	*Curriculum & Instruction Division*	*John Lo*
Trauma-informed practices training	*Educator Professional Development Division*	*Karina Gutierrez*
School-based mental health initiatives	*Student Well-being Division*	*Simon Jackson*
After-school programs Parent volunteer programs	*Family and Community Engagement Division*	*Janis Costello*
All	*Communications Department*	*Titus Hughes*

You may wish to include other areas of work or initiatives housed in a range of departments or agencies in the LEA, such as:

- **equity**
- **family**
- **youth**
- **school climate**
- **discipline**
- **school improvement**
- **social and emotional learning**
- **curriculum & instruction**
- **student support services**
- **mental/behavioral health**
- **safety**
- **crisis response**
- **data and/or accountability**
- **homelessness**
- **health**
- **juvenile justice**

In addition to these areas, consider including school, family, and student members on your team to help ensure that the work includes essential stakeholder collaboration and promotes equity. However, be careful not to tokenize these stakeholders. Ensure that their roles are meaningful, that their voices and influence are equal to those of the other participants, and that their engagement is actively supported.

While broad representation is important for your team, large teams can become difficult to manage and may hinder decision-making. If your district is just starting this work, you should consider keeping your initial team to fewer than seven people.

Finally, remember that this is a journey. As your work evolves, your team composition may need to evolve with it. Alignment and coherence of whole-person initiatives invites leaders to challenge the status quo and facilitate systems change, while remaining open to learning. By working as a team,

you will get to discover together the strengths and aspirations of your community, as well as any gaps between your current reality and your desired vision for serving the whole person. Therefore, following the process in this guide can serve as a powerful opportunity to build and deepen relationships, both within your district and between your district team and your schools.

Roles and Responsibilities, Including Facilitation

As you form a team, you will need to identify individuals to take notes, develop and facilitate agendas, coordinate preparation, and follow up after meetings. Teams may also wish to identify a data analyst who is able to work across divisions to aggregate and organize key data and to identify important correlations and trends.

One of the most important roles is facilitation. For some teams, a few individuals will share facilitation duties, including responsibility for communication among team members, preparation for and follow-up after the various team meetings, and facilitation of the meetings. For others, one facilitator with a range of knowledge and skills and a flexible leadership style will suffice.

Internal and/or external facilitators may be involved, though each option comes with trade-offs. Recruiting individuals to facilitate from outside of your team (or even your LEA) relieves all team members of the responsibility of facilitating and provides them each with equal opportunities to fully participate and engage in the process. Outside facilitators may also be better positioned to challenge the group and ask difficult questions. On the other hand, a facilitator from within the LEA may have established relationships and useful knowledge of the history and contexts of the initiatives, allowing them to quickly focus the work. Internal facilitators may also be more cost-effective.

Regardless of where the facilitator is from, your team should clearly define facilitation roles and responsibilities prior to beginning the work. If your team is choosing an external facilitator, consider developing a clear plan for building the internal capacity of your district to engage in continuous improvement of alignment and coherence over time, so that valuable knowledge does not disappear when a facilitator departs.

As you move forward, keep in mind that work toward alignment and coherence will be challenging because it requires incorporating the perspectives, needs, and aspirations of a diverse group of stakeholders. The most beautiful moments occur when the team finds that different positions actually share the same values or interests, and that there is a path forward that feels good to all stakeholders. However, there are certain to be times when a decision needs to be made that does not fully meet the hopes of one person or group within the team. In these moments, it is important for the team to ensure that the decision does not cause harm or calcify systems of inequity. It is also important that the person or group that feels disappointed by the decision continues to seek ways to collaborate and invest in a process that should ultimately promote better, more equitable whole-person outcomes for children and youth in your district.

Your First Meeting

In your first meeting, include some time for team members to get to know one another better. The following text box provides a sample meeting agenda and recommended activities. The following sections describe the two activities that should be completed during the first meeting.

Sample Agenda

Prereading: The introduction and first section of this guide.

Materials: Copies of this guide.

Meeting Goal: Kick off the alignment and coherence work for our district's whole-person initiatives by determining the scope of our alignment and coherence work and our readiness to engage.

Meeting Agenda:

- *15 minutes* — Welcome and team introductions
- *30 minutes* — Introduction to the guide and to the purpose of the team
- *30 minutes* — Identify the scope of our alignment and coherence effort (Activity 1), using the answers to questions such as:
  - What leads us to this guide? What need for alignment and coherence do we see in our district?
  - How might this guide help move our district toward alignment and coherence?
  - How does this process contribute to or advance the goals of similar initiatives we may be undertaking?
  - What is this team's decision-making power?
- *30 minutes* — Readiness assessment (Activity 2)
- *10 minutes* — Identify next steps

Activity 1. Identify the Scope of Your Alignment and Coherence Effort

Depending on your district's strengths, goals, and needs, the scope of your alignment and coherence process may vary. For example, you may wish to make one division within your LEA (such as student services) more aligned and coherent with other divisions (such as curriculum and instruction); you may wish to help staff within a single division work together in more aligned and coherent ways; or you may wish to make your district's collaboration with your community partners more aligned and coherent. Scoping this work in any of these ways is okay. Further, focusing on alignment and coherence at the largest potential scale may not be necessary or feasible. Starting smaller may be the most effective way to begin the work.

Activity 2. Assess Your Readiness

Consider the following questions to evaluate your district's collective skills, knowledge, and support for alignment and coherence of whole-person initiatives.

Leadership

Have our LEA leaders prioritized serving the needs of our community (student, family, or educator) by implementing whole-person initiatives?

Have our LEA leaders prioritized alignment and coherence of whole-person initiatives?

Notes:

Facilitation

Have we identified who will facilitate the process outlined in this guide, and do they have the support they need?

Notes:

Coordination and Communication

Have we identified differences across the agency in how we define and talk about our whole-person work?

Have we established systems and procedures for communicating with one another between meetings?

Notes:

Shared Understanding

Do we have shared goals, and do we understand how to pursue/achieve them?

Do we understand why alignment and coherence matter?

Do we understand how our whole-person initiatives impact our children and youth?

Notes:

Team Capacity

Do we have the right skills on our team for this work? (If not, where can we find such skills?)

Are we open to adapting our mindsets and behaviors to increase the alignment and coherence of our district's whole-person priorities?

Are we following a process to improve alignment and coherence of our whole-person initiatives?

Do data inform our decisions and how we understand our strengths and barriers?

Do we have a process for action planning and using data to monitor improvement?

Notes:

Improving Readiness

The readiness of teams will vary. You do not need to answer "yes" to every question in the previous reflection to start using this guide. However, your responses should inform which steps you want to take to prepare for success. As your district engages in this work, your team's capacity will increase.

List any actions you need to take before implementing this guide.

What?	By When?	Who Is Responsible?

Please proceed to *Chapter 1. Identify the Strengths, Needs, and Aspirations of Your Students.* In this chapter, you will deepen your knowledge of the students in your district.

CHAPTER 1. IDENTIFY THE STRENGTHS, NEEDS, AND ASPIRATIONS OF YOUR STUDENTS

Purpose

Your alignment and coherence process should begin with a vision for serving the whole person in your district, and that vision should be guided by a deep understanding of the students you serve. When whole-person efforts are tailored to students' specific strengths, aspirations, and needs, students can develop and learn to their full potential, regardless of their backgrounds.

This understanding should be grounded in data — beyond the accountability data you may already collect. Take this opportunity to engage stakeholders and incorporate youth and family voice, through interviews and focus groups. This is an important strategy for humanizing your data, so that your team has an understanding of the context and nuance of student and family experiences.

Additionally, ensure that the narratives you create are strengths-based, rather than solely focused on needs or gaps. Incorporate community values and traditions into your understanding. The following hypothetical district responses provide examples of how to do this.

Activity

Use the following prompts to reflect on the strengths, needs, and aspirations of your students. As you answer, be sure to refer to your data to answer the *How do you know?* portions of the prompts.

What are your students' *aspirations* for the future? How do you know?

A hypothetical school district might say:

> *According to focus groups held at our districtwide youth forums, our students want their schools to prepare them for college and for independence from their families. Family surveys support this finding.*

What are your students' *strengths*? How do you know?

A hypothetical school district might say:

> *Our students have the unwavering support of their families, who have been a part of this community for generations. Families have demonstrated resilience against economic and social hardship. Through community surveys and focus groups, we have learned that families also hold clear values about personal and community responsibility, cultural pride, and justice.*

What gets in the way of your students achieving their previously described aspirations? What are the *needs* of your students and families? How do you know?

A hypothetical school district might say:

> *Many of our families have told us in focus groups that they lack the resources for supplemental academic supports and extracurricular activities for their students. Many students do not participate in our college and career readiness programs, and we do not know if they are aware of these opportunities.*

Who *succeeds* in your schools and why? How do you know?

A hypothetical school district might say:

> *Families with higher incomes are moving into our neighborhoods for the quality of our high school science program, according to real estate data from the mayor's office and our new family surveys. Students from these families have higher academic performance and report higher levels of school connectedness on school climate surveys than average.*

> *94 percent of our students who graduate in the top quartiles of their classes are admitted to a two- or four-year college, according to school data reported to our district.*

Who *struggles* in your schools and why? How do you know?

A hypothetical school district might say:

> *88 percent of our students from low-income backgrounds are graduating in the bottom halves of their classes, according to school data reported to our district.*

> *74 percent of our Black boys and 68 percent of our Latino boys report that they are not able to identify an adult at school who cares about them, according to our student surveys. Washington Middle School and Ida B. Wells High School are the only positive outliers.*

Reflection

Congratulations! Your team has now articulated a nuanced understanding of the strengths, aspirations, and needs of the students in your district. This understanding will guide the selection of your focus area for your alignment and coherence efforts.

Once this chapter is complete, reflect on the following questions:

- Consider your team leading this alignment and coherence work. Is the composition of this team still right? If not, who else should be included? Who should step out of this group?

- Consider how your team worked together to complete this chapter. What worked well? Where did you get stuck? What new agreements or strategies would make your work more effective going forward?

- Who else in your district needs to be informed of your progress? In particular, how will you communicate your team's progress — including key decisions, successes, and challenges — to your leaders?

- How might you communicate about your work in this chapter to other stakeholders outside of your district to build awareness, engagement, and commitment to the work? How might you communicate about your work in this chapter to receive timely, honest feedback about the effectiveness of your work?

Please proceed to *Chapter 2. Describe How These Strengths, Needs, and Aspirations Inform Your Vision for Serving the Whole Person in Your District.* In this chapter, you will connect your understanding of the students in your district with a vision for their whole-person learning and development

CHAPTER 2. DESCRIBE HOW THESE STRENGTHS, NEEDS, AND ASPIRATIONS INFORM YOUR VISION FOR SERVING THE WHOLE PERSON IN YOUR DISTRICT

Purpose

Equipped with a deeper understanding of the students you serve, you are now ready to develop a vision for serving the whole person in your district. A strong vision not only describes your hopes for the future of every child you serve; it also reflects the values, aspirations, and histories of the students, their families, and their communities. It should be broad, inspiring, and easy to communicate.

Activity

In this activity, your team will use what you have learned so far to develop a vision for serving the whole person, if you have not already done so prior to starting work with this guide.

If your district has already articulated a vision for serving the whole person, state it here. (If not, skip to the next prompt.) For example, you can respond to this prompt with a "graduate profile" description.

A hypothetical school district might say:

> *Our graduate profile promises: Graduates of our district will move on to college and careers with a sense of identity and connection to their community and a commitment to making the world a better place. They are critical thinkers, creative problem solvers, and effective communicators. They are resilient and lead with integrity.*

If your district has *not* articulated such a vision, describe any themes that emerge from the student aspirations, strengths, and needs you identified in Chapter 1.

A hypothetical school district might say:

> *Our students have clear aspirations for their future and see education as a path to achieving them. Our responsibility is to create opportunities for students to achieve college and career success that build from their personal strengths while overcoming their economic obstacles.*

If your district has *not* articulated such a vision, how might the themes you described establish a vision for serving the whole person?

A hypothetical school district might say:

> *Every student, regardless of their background or circumstance, will graduate high school with the skills and mindsets they need to succeed in college and career.*

Does your state offer guidance, policy, and/or funding for how to achieve your district's vision? How does this guidance, policy, and/or funding connect to your work in achieving equity, engaging stakeholders, serving diverse student needs, teaching and learning at high levels, using data, and/or striving for other student outcomes?

A hypothetical school district might say:

> *Our state provides guidance on serving the social, emotional, mental, and behavioral health needs of students. Our district is also a grantee of the federal School Climate Transformation Grant program.*

Reflection

Congratulations! Your team has now articulated a vision for serving the whole person in your district, reflecting your nuanced understanding of the strengths, aspirations, and needs of your students. You are now ready to delve into a focus area for your alignment and coherence efforts.

Once this chapter is complete, reflect on the following questions:

- Consider your team leading this alignment and coherence work. Is the composition of this team still right? If not, who else should be included? Who should step out of this group?

- Consider how your team worked together to complete this chapter. What worked well? Where did you get stuck? What new agreements or strategies would make your work more effective going forward?

- Who else in your district needs to be informed of your progress? In particular, how will you communicate your team's progress — including key decisions, successes, and challenges — to your leaders?

- How might you communicate about your work in this chapter to other stakeholders outside of your district to build awareness, engagement, and commitment to the work? How might you communicate about your work in this chapter to receive timely, honest feedback about the effectiveness of your work?

Please proceed to *Chapter 3. Identify a Focus Area for Coherence.* In this chapter, you will select a focus area for your alignment and coherence efforts.

CHAPTER 3. IDENTIFY A FOCUS AREA FOR COHERENCE

Purpose

Alignment and coherence work is complex, and without focus, it can be unwieldy. Having a focus area will help ensure that there is *coherence* in your work — that you are building a complete picture with the various puzzle pieces of your whole-person initiatives.

In this chapter, you will identify a goal or focus area for your alignment and coherence work. This goal might be a need that you hope to meet, a strength that you hope to bolster, or an aspiration that you hope to support, so that students achieve the whole-person vision that you have set in the previous step. This goal might also be about strengthening the knowledge, capacity, or well-being of the adults in the school system who care for children.

You may find that there are lots of exciting potential focus areas, and you may struggle to select just one. However, this guide recommends choosing no more than one or two with which to start. Once your district is successfully implementing an alignment and coherence plan for a focus area, your team may elect to return to this guide and work through the process again for future areas of focus.

Activity

In this activity, your team will reflect upon the work you have done so far and then, based on these reflections, articulate a focus area for where you will seek to increase the alignment and coherence of your whole-person work.

Start by summarizing your reflections in Chapters 1 and 2.

A hypothetical school district might say:

> *It is clear that the demographics in our community are changing. Further, the gentrification of our neighborhoods is coinciding with what appears to be a widening achievement gap in our schools: students from wealthier families are performing at higher levels, graduating with stronger STEM portfolios, and going on to enroll in and graduate from college at higher rates. Although families with lower incomes have equally high expectations for their students, their students are having less academic success. We also note that our boys of color are less engaged in school than other subgroups are. However, two schools in our district seem to be having greater success with engaging boys of color: Washington Middle School and Ida B. Wells High School.*

Based on these reflections, articulate a *focus area* for where you will seek to increase the alignment and coherence of your whole-person work. This focus area should reflect your best thinking to date, based on the data you have in front of you, but it may evolve as you gather additional data.

It may be helpful to use a "so that" coordinating conjunction, to connect your focus area with your broader vision for serving the whole person in your district.

A hypothetical school district might say:

> *Based on these early reflections, our team will focus on engagement and belonging for our Black and Latinx students, especially our boys, so that they graduate from high school better prepared to succeed in college and career.*

What do you still wish you knew or understood about your students? In other words, what data are still missing?

A hypothetical school district might say:

We wish we knew the root cause(s) for why the racial demographics in our community are changing.

We wish we knew more about the school climate practices at Washington Middle School and Ida B. Wells High School.

We wish we knew the racial makeup of our district's college and career success programs.

As you gather new data, you should gain more information about *how* you will achieve greater alignment and coherence toward your focus area. For example, the hypothetical team may learn about a parent engagement strategy at Washington Middle or Wells High that helps families — and, therefore, students — develop a greater sense of connection to the school. Further, they may see that those data coincide with lower chronic absenteeism rates and higher academic achievement. Over time, other new data may inspire more ideas that refine or shift the focus area.

While new data are important, you should not allow lingering questions to halt your progress.

Reflection

Congratulations! Your team has now identified a specific focus area to guide the coherence of your work.

Once this chapter is complete, reflect on the following questions:

- Consider your team leading this alignment and coherence work. Is the composition of this team still right? If not, who else should be included? Who should step out of this group?

- Consider how your team worked together to complete this chapter. What worked well? Where did you get stuck? What new agreements or strategies would make your work more effective going forward?

- Who else in your district needs to be informed of your progress? In particular, how will you communicate your team's progress — including key decisions, successes, and challenges — to your leaders?

- How might you communicate about your work in this chapter to other stakeholders outside of your district to build awareness, engagement, and commitment to the work? How might you communicate about your work in this chapter to receive timely, honest feedback about the effectiveness of your work?

Please proceed to *Chapter 4. Tailor the Implementation of Your Whole-Person Initiatives for Alignment With Your Focus Area.* In this chapter, you will identify ways to adjust your whole-person initiatives to support greater alignment within your focus area. You will also reflect on how your emerging plan contributes to the conditions of learning and development that you have put in place for students, families, and educators.

CHAPTER 4. TAILOR THE IMPLEMENTATION OF YOUR WHOLE-PERSON INITIATIVES FOR ALIGNMENT WITH YOUR FOCUS AREA

Purpose

In this chapter, your team will delve into the details of your portfolio of whole-person initiatives, and consider ways to tailor the implementation of these initiatives so that they support the focus area you set for yourself in Chapter 3. This process of tailoring creates *alignment* in support of your focus area. The activity in this chapter is supported by the Conditions for Equitable Learning and Development conceptual framework shown on page 5.

Activity

In the chart on page 30, list your current initiatives — including strategies and programs — that are most connected to the focus area you identified. The list need not be exhaustive. Choose the ones that you believe are most relevant or most clearly connected to the focus area.

Return to the personal, school, and system conditions for success described on page 5. Then, for each initiative:

- **Identify how the initiative might work toward achieving the goal that the focus area identified.** Although the intended impact of an initiative might be much broader than the scope of your focus area, think about how the implementation of this initiative might contribute specifically to the focus area you identified.

- **Describe the data you collect, or will collect, for that initiative.** How will you know if the initiatives are helping your district or school achieve the goal described in your focus area? What goals will you set for those measures, to indicate progress toward your guiding vision?

- **Identify the extent to which the initiative impacts or promotes personal, school, and/or system conditions for learning and development.** You may list which of the conditions are affected; if desired, you may rate the impact of the initiative on those conditions on the following Likert scale:

0 = Not at all   1 = Small impact   2 = Moderate impact   3 = Significant impact

If this is done as a group, make time to calibrate the group's ratings and come to some consensus about both the ratings and your rationale for each rating.

Here is an example of how a hypothetical district might fill out the chart for its focus area:

Focus Area: Academic excellence for our Black and Latinx students, especially our boys, so that they graduate from high school better prepared to succeed in college and career.

Initiative	How might this initiative contribute to success in this focus area?	How do you know if initiatives are working? What specific, measurable goals will you set?	Conditions for Equitable Learning and Development (Personal, School, System)
1. Family connection initiative	*Conduct intentional outreach to ensure that Black and Latinx parents and guardians are well represented on school event planning committees, from conception to execution.*	*50% of Black and Latinx parents and guardians involved in event planning and other committees for their schools.*	*Personal, School*
2. College counseling programs	*Conduct intentional outreach to Black and Latinx students, to understand what would inspire them to engage more actively in the college counseling program, and then modify the program in response.*	*100% of Black and Latinx students applying to college.* *100% of Black and Latinx students accepted to a two- or four-year college.*	*Personal, School*

Initiative	How might this initiative contribute to success in this focus area?	How do you know if initiatives are working? What specific, measurable goals will you set?	Conditions for Equitable Learning and Development (Personal, School, System)
3. Student internship program	Provide guidance to schools on how to actively recruit Black and Latinx students to participate in the internship program.	25% of Black and Latinx students participate in a semester-long internship.	Personal, System
4. Exemplars program	Offer opportunities for school leaders to visit schools with exemplary school climates, especially for boys of color and other students of color, so that the leaders can learn from their practices.	100% of Black and Latinx students, especially boys, can identify an adult in their school who cares about them.	School
5. Professional learning on culturally responsive teaching practices	Require that all teachers participate in a professional learning series on culturally responsive teaching practices.	All subject areas integrate culturally responsive strategies in at least 50% of all instruction.	Personal, School

Now fill out the chart for your own school or district.

Focus Area:

Initiative	How might this initiative contribute to success in this focus area?	How do you know if initiatives are working? What specific, measurable goals will you set?	Conditions for Equitable Learning and Development (Personal, School, System)

Reflection

Congratulations! In this chapter, you developed ideas for how to tailor the implementation of your whole-person initiatives to support the focus area you identified.

Once this chapter is complete, reflect on the following questions:

- Consider your team leading this alignment and coherence work. Is the composition of this team still right? If not, who else should be included? Who should step out of this group?

- Consider how your team worked together to complete this chapter. What worked well? Where did you get stuck? What new agreements or strategies would make your work more effective going forward?

- Who else in your district needs to be informed of your progress? In particular, how will you communicate your team's progress — including key decisions, successes, and challenges — to your leaders?

- How might you communicate about your work in this chapter to other stakeholders outside of your district to build awareness, engagement, and commitment to the work? How might you communicate about your work in this chapter to receive timely, honest feedback about the effectiveness of your work?

Please proceed to *Chapter 5. Create an Action Plan*. In this chapter, you will create an action plan for greater alignment and coherence across your portfolio of whole-person initiatives.

CHAPTER 5. CREATE AN ACTION PLAN

Purpose

You have worked hard to get to this point! In this chapter, you will prioritize the ideas you created in Chapter 4 to identify a few key activities you will undertake as part of an action plan for alignment and coherence. You will then build out a high-level action plan for these activities.

Activity

Review your responses in Chapter 4. Pay particular attention to how your team filled in the column "How might this initiative contribute to success in this focus area?" in the table. Your responses in this column provide emerging ideas for aligning your whole-person initiatives to achieve success in your focus area. Which of these options would you prioritize? Ideally, your team should focus on just a few activities that allow you to focus your efforts. What three to five goals and associated activities would have the greatest impact on achieving success in the focus area you identified?

The hypothetical district has limited capacity this year, and narrows the options listed in its chart to just three high-level goals for its action plan.

Prioritizing high-level implementation goals
1. *Conduct intentional outreach to Black and Latinx students, to understand what would inspire them to engage more actively in the college counseling program, and then modify the program in response.*
2. *Offer opportunities for school leaders to visit schools with exemplary school climates, especially for their students of color and their boys of color, so that the leaders can learn from their practices.*
3. *Require that all teachers participate in a professional learning series on culturally responsive teaching practices.*
4.
5.

Now fill out the prioritization template for your own district.

Template: Prioritizing high-level implementation goals

Now, develop an action plan for achieving the prioritized goals. You can use the following template to identify up to five high-level goals and up to three high-level activities to accomplish meaningful progress toward each of those goals, as well as to identify who will lead the work, when each activity should be completed, and the status of each activity toward completion. Additionally, the template

includes space below each goal for supporting notes. Ideally, these goals will be "SMARTIE" goals, where each letter stands for an attribute of the goal. That is, goals should be:

S = Specific

M = Measurable

A = Ambitious

R = Realistic

T = Time-bound

I = Inclusive

E = Equitable

The hypothetical team fills out the action plan as follows:

Goal 1. *Conduct intentional outreach to 100% of Black and Latinx students in 7th–12th grade, to understand what would inspire them to engage more actively in the college counseling program, and then modify the program in response by the end of the summer.*

Goals and Activities	Lead	Due Date	Status
1a. Convene high school principals to share with them the goal of increasing engagement in the college counseling program	*John Lo*	*February*	*Not Started*
1b. Collaborate with principals on a strategy for outreach	*John Lo*	*February*	*Not Started*
1c. Execute outreach program	*Staff*	*Mar–Apr*	*Not Started*
1d. Gather data from program	*Data analyst*	*Apr–May*	*Not Started*
1e. Action planning with principals	*Task force*	*June*	*Not Started*

Notes: *Strategies to engage Black and Latinx students in the college counseling program will be developed by a task force made up of principals, college counselors, and Black and Latinx high school students.*

Goal 2. *Offer opportunities for 100% of middle and high school leaders to visit schools with exemplary school climates, especially for students of color and boys of color, so that the leaders can learn from their practices, during the coming school year.*

Goals and Activities	Lead	Due Date	Status
2a. Gather school climate data (quantitative and qualitative) to identify exemplars	*Simon Jackson, supported by data analyst*	*July*	*Not Started*
2b. Collaborate with exemplar principals to create dissemination strategies (case studies, communities of practice)	*Simon Jackson*	*August*	*Not Started*
2c. Develop visiting program for school leaders as a professional learning opportunity to support dissemination strategies	*Staff*	*October*	*Not Started*

Notes:

Goal 3. *Require that 100% of middle and high school teachers participate in a yearlong professional learning series on culturally responsive teaching practices in the next 18 months.*

Goals and Activities	Lead	Due Date	Status
3a. Identify funding for release time for additional professional learnings	*Karina Gutierrez, supported by staff*	*April*	*Not Started*
3b. Identify high-quality professional learning on culturally responsive teaching practices	*Staff*	*May*	*Not Started*

Notes:

Now fill out the action plan template for your own district.

Goal 1:

Goals and Activities	Lead	Due Date	Status
1a.			
1b.			
1c.			

Notes:

Goal 2:

Goals and Activities	Lead	Due Date	Status
2a.			
2b.			
2c.			

Notes:

Goal 3:

Goals and Activities	Lead	Due Date	Status
3a.			
3b.			
3c.			

Notes:

Reflection

Congratulations! Your team has now created a plan for greater alignment and coherence in your portfolio of whole-person initiatives. The tailored implementation of these initiatives will ensure that each initiative is part of achieving a key focus area in support of your vision for serving the whole person in your district.

Once this chapter is complete, reflect on the following questions:

- Consider your team leading this alignment and coherence work. Is the composition of this team still right? If not, who else should be included? Who should step out of this group?

- Consider how your team worked together to complete this chapter. What worked well? Where did you get stuck? What new agreements or strategies would make your work more effective going forward?

- Who else in your district needs to be informed of your progress? In particular, how will you communicate your team's progress — including key decisions, successes, and challenges — to your leaders?

- How might you communicate about your work in this chapter to other stakeholders outside of your district to build awareness, engagement, and commitment to the work? How might you communicate about your work in this chapter to receive timely, honest feedback about the effectiveness of your work?

Please proceed to *Chapter 6. Plan for Strategic Communication That Reinforces the Work*. In this chapter, you will create a communication plan for bidirectional communication with a range of stakeholders about your whole-person work.

CHAPTER 6. PLAN FOR STRATEGIC COMMUNICATION THAT REINFORCES THE WORK

Purpose

Equitable and effective strategic communication is bidirectional. All stakeholders should be able to describe the whole-person initiatives in an accurate and compelling way, articulate their own roles in working toward the vision of serving the whole person, and provide honest and transparent feedback to those in power about the whole-person work. The following activity is adapted from one designed by the communications strategy firm BeClear and is intended to support your district in strengthening your strategic communications about whole-person work.

Activity

Consider how you will integrate whole-person alignment and coherence work into your district's communications strategy, including the focus area or areas you are working toward and the progress you hope to achieve within that area or those areas.

Answer the following questions:

What is your "outbound" communication goal? To accomplish your aims, who needs to know and believe what?

A hypothetical school district might say:

We want our schools and their families to believe that college success is within reach for all our students, and to collaborate with us on improving engagement in school and access to college, particularly for our boys of color.

In order to achieve this communication goal, what are the most important audiences for you to reach, in priority order?

A hypothetical school district might say:

1. *School leaders*

2. *Families*

3. *Teachers*

What core messages do you want those audiences to hear? Using what you know about different stakeholders, where might you emphasize different aspects of the message? What supporting information — such as data or anecdotes — might you use to help different stakeholders understand this message?

A hypothetical school district might say:

Our schools will provide the knowledge and experiences necessary for all students to thrive in college — regardless of their background or circumstance. We will share data about college success programs with all audiences. For families, we will share specific anecdotes about students who have experienced success after graduating from our schools. For educators, we may also share insights on best practices from the work at our exemplar schools.

Where will you reach these key audiences with these messages? How can you reach your stakeholders where they already are (such as on social media, in existing publications, or during regular community events)? Where might you need to create new methods of outreach or engagement (such as new case-study publications or professional development offerings)?

A hypothetical school district might say:

- *Improved outreach to students and families through social media and school newsletters*

- *Professional learning for our teachers and school leaders*

- *Case studies and related conversations about exemplar schools to reach students, families, and educators*

What is your "inbound" communication goal? That is, what do you need to learn in order to accomplish your aims? Who needs to provide you with advice, insight, and/or feedback?

A hypothetical school district might say:

Students, families, teachers, and college counselors can help us understand how school climate in their school is succeeding or falling short. We are particularly interested in understanding what helps students and their families feel a sense of belonging and connection with their school.

How will you use the advice, insight, and/or feedback you receive from stakeholders?

A hypothetical school district might say:

Survey and interview data about our school climate will be collected quarterly and synthesized by a data analyst. Those data will be shared with the heads of the Curriculum & Instruction, Educator Professional Development, Student Well-Being, and Family and Communications divisions. They will analyze the data together, and then convene the principals and assistant principals of all of the high schools for additional interpretation and action planning.

Reflection

Congratulations! Your team has now completed a full cycle of work toward improving the alignment and coherence of your district's whole-person initiatives.

You may choose to sustain and continuously improve your alignment and coherence over time by returning to this process periodically to ensure that your understanding of student strengths, aspirations, and needs is current; to refresh your vision for serving the whole person; and to identify new focus areas for aligned and coherent implementation of your portfolio of whole-person initiatives. Thoughtful and consistent communication will help to ensure that your work remains effective and relevant.

CONCLUSION

By improving the alignment and coherence of the whole-person initiatives in your district or school — and clarifying the ways in which your stakeholders communicate and learn about that work — you have just taken a significant step toward ensuring that all students and adults can reach their fullest potential. This is just the beginning of a productive cycle of improvement, which will help your district or school's children and youth become thriving adults who are well equipped to raise our next generation of children. No other work is more important.

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