



SERVING THE WHOLE PERSON

Spotlighting Whole-Person Success:
A Guide for Using Statewide Data to Identify
Exemplar Districts in SEL and School Climate

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INTRODUCTION

Purpose of This Resource

Across the United States, educators and education leaders are increasingly recognizing the value of social and emotional learning (SEL), school climate, and related whole-person efforts as keys to enabling student success.

Like the narrower concept of the “whole child,” 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. “Whole person” is also meant to encompass all ages in the school system, ranging from the very young through the teenage years, as well as adults such as educators and staff. Science shows that these domains develop together and that health and well-being in one domain bolster health and well-being in the others (Cantor et al., 2018). When schools and school systems adopt a whole-person approach — including attending to social and emotional needs — they often see improved student attendance and engagement, improved student connectedness, better social and emotional health, and improved academic outcomes (Darling-Hammond & Cook-Harvey, 2018). For adults in schools, healthy school culture and climate also correlate with greater job satisfaction and higher retention of school staff (Collie et al., 2012; Kraft et al., 2016).

However, many school districts are still exploring or just beginning implementation of these whole-person efforts, and many have expressed the desire for exemplars from which they can learn.

To support statewide implementation, this resource aims to help state and regional education leaders:

- Identify districts or schools with notably positive outcomes in the areas of SEL and school climate, using quantitative analyses
- Verify that the positive outcomes are linked to intentional SEL, school climate, or other whole-person efforts
- Share success across the state and use exemplars' strategies and experiences to scale up whole-person practices and outcomes



In this context, the term “exemplar” does not only refer to a high-performing district or school; rather, it refers to one that is achieving notably positive student outcomes in a way that advances equity. For example, alongside its strong performance, an exemplar should serve substantial populations of prioritized demographic groups (e.g., students from underresourced communities) and/or have notably low achievement gaps. In most cases, these districts are using whole-person strategies such as SEL and trauma-informed practices to create safe and supportive learning environments. These environments help ensure that every child can attain equitable learning outcomes and can thrive – regardless of background or circumstance.

Indeed, a major goal of this guide is to advance equity. The Center for the Study of Social Policy (2019) describes work toward equity as acknowledging “unequal starting places and the need to correct imbalance” (p. 5). Greater equity in education can be achieved when educators and leaders provide students with environments that support all domains of healthy development. This guide gives state and regional leaders an opportunity to discern effective strategies for increasing equity by more effectively serving the whole person, such as by developing social and emotional skills and competencies, promoting youth and family voice and agency, celebrating identity, and holding high expectations for every student.

While this guide is designed to be flexible for each state’s own context and available data, meaning that some steps in the methodology may be adapted or skipped, it is vital to retain the steps related to equity. Otherwise, the process will simply identify high-performing districts – including districts whose outcomes may be coincidental or due to contextual factors – rather than those whose results have come through intentional efforts focused on the whole person and on high achievement for every student.

Potential Goals for Identifying SEL/School Climate Exemplars

State teams may uncover several benefits by using this guide to identify exemplars. Before beginning this process, teams should reflect on their own goals for identifying SEL/school climate exemplars. Such goals might include:

1. **Communicating the value of SEL.** Identifying exemplars and highlighting their success stories can help illustrate and communicate the benefits of SEL and other whole-person strategies. If this is the team’s primary goal, the team might aim to produce communication products — e.g., a written case study, published interviews, videos — to share across the state in order to inspire other districts to adopt SEL and related practices.
2. **Connecting districts to peers for professional learning.** Identifying exemplars can enable other nearby districts to connect with the exemplar district and learn directly from its implementation efforts. If this is the team’s primary goal, the team might aim to organize professional development opportunities and materials that enable other districts to learn from the exemplar.
3. **Building the team’s data capacity.** The process for identifying exemplars involves looking for patterns across statewide outcome data, examining multiple measures of student success, and collecting local qualitative data. Consequently, building the team’s data capacity can be an additional goal of this process (and a benefit that may result). In addition, while education leaders most frequently use data to identify areas in need of improvement — which is certainly important — the exemplar identification process can help team members adopt a more strengths-based orientation by also using data to identify and scale models of success. However, because building the team’s data capacity is a process-oriented goal, the team should also identify at least one outcome-oriented goal for identifying exemplars (such as goals 1 and 2).

Benefits of Using Both Quantitative and Qualitative Data to Identify Exemplars

Traditionally, many statewide efforts to identify district exemplars have relied on a nomination process or on informal word-of-mouth recommendations. While these methods can undoubtedly surface some districts that are doing valuable work, they have two major pitfalls. First, such an identification process may be biased. Without comparing nominee districts’ outcomes to statewide data, whether highlighted districts truly possess either whole-person outcomes or exemplary implementation is impossible to determine. Second, a process that relies on qualitative nominations may overlook lesser-known districts that are implementing valuable strategies and experiencing success.

Consequently, this guide uses a data-driven, mixed-methods approach to identifying exemplars, including both quantitative and qualitative data analysis. By starting with a quantitative analysis of student outcome data and following it with a qualitative analysis of district processes and practices, this approach ensures that identified districts demonstrate exemplary outcomes, confirms that whole-person efforts are connected to those outcomes, and allows for lesser-known exemplary districts to surface. This approach was inspired by the Learning Policy Institute’s work with “positive outliers” (Podolsky et al., 2019) as well as the collaborative effort by WestEd, the California Collaborative

for Educational Excellence, and the California Department of Education to identify “continuous improvement models” (Krausen et al., 2019).

How to Use This Guide

This guide and the process it outlines are designed to surface exemplar districts that are achieving strong, equitable whole-person outcomes and to help spread their insights and practices to other parts of a state. This process can be adapted for any state’s context and data. For example, in a setting with few school districts (such as a small state or a county), using this process to identify exemplar schools rather than districts may make sense. (More details on this particular decision point can be found on p.8.)

In all geographic contexts, this guide’s data analysis process should be conducted by a small team of state or regional education leaders — rather than a single individual — to ensure that the decisions made along the way are free of individual biases and blind spots. The team should include at least one individual with the authority to make decisions about how to prioritize various criteria for selecting districts, as well as at least one person from the organization’s data team (or an individual with similar quantitative data analysis expertise). Given this process’s focus on SEL and school climate, it is also important to include staff with expertise in these areas.

Two leaders should co-lead the process:

1. **Facilitator.** This leader facilitates each meeting and coordinates the overall process.
2. **Data lead.** This leader conducts data analyses in advance of meetings and explains the results to the team during each meeting.

Other team members provide thought partnership throughout the quantitative data analysis and later support the qualitative data collection.

The entire process can take weeks or months, depending on your context and your team’s capacity. It involves multiple data analyses and collaborative decision-making over the course of several sequential discussions, concluding with the final selection of exemplar districts and gathering of information about the practices that have helped them achieve strong whole-person outcomes. Table 1 includes an overview of the process and steps.

Table 1. Process and Steps for Selecting Exemplar Districts

Key action	Purpose/corresponding steps in this guide
<p>Part 1: Quantitative analysis to identify potential exemplars</p>	<p>Identify at least one potential exemplar district, based on student outcome data.</p>
<p>Meeting 1: Set the stage (1.5 hours)</p>	<p>Step 1: Provide an overview of the process and confirm the team’s goal(s) for identifying SEL/school climate exemplars.</p> <p>Step 2: Determine whether to use school-level or district-level data.</p> <p>Step 3: Identify all available data.</p> <p>Step 4: Prioritize which data to use in your analyses.</p> <p>Step 5 (optional): Consider other desired characteristics.</p>
<p>Preparation for Meeting 2: Perform initial data analyses (Data lead completes these analyses between meetings)</p>	<p>Step 6 (if needed): Transform individual responses to SEL/school climate surveys into a format suitable for statewide comparisons.</p> <p>Step 7: Conduct statewide analyses of your prioritized measures.</p> <p>Step 8: Look for trends across districts’ performance across your prioritized measures.</p>
<p>Meeting 2: Review initial data analyses and determine criteria and priorities for narrowing the list of districts (3.5–4 hours)</p>	<p>Step 9: Review initial analyses of statewide and district data.</p> <p>Step 10: Determine criteria and priorities for progressively narrowing the list.</p>
<p>Preparation for Meeting 3: Narrow the list of districts through further data analysis (Data lead completes these analyses between meetings)</p>	<p>Step 11: Apply the team’s desired thresholds and criteria to narrow down the list of districts.</p> <p>Step 12: For the narrowed-down list of districts, include additional data to provide a more comprehensive picture of each district</p>

Key action	Purpose/corresponding steps in this guide
<p>Meeting 3: Review final results of quantitative analysis (3.5–4 hours)</p>	<ul style="list-style-type: none"> • If needed, decide on priorities that can be used to define additional criteria in the data to further narrow down the list. • Share final short list of potential exemplars and determine roles for qualitative analysis (see Part 2).
<p>Part 2: Qualitative analysis to verify and finalize exemplars</p>	<ul style="list-style-type: none"> • Verify whether the district’s positive outcomes are linked to intentional, systematic efforts related to SEL/school climate. • Verify whether the district has concerning characteristics or behaviors that would prevent it from serving as a suitable exemplar.
<p>Gather qualitative data</p>	<p>Step 1: Conduct background research on each district and its work.</p> <p>Step 2: Conduct video and phone interviews with leaders from your final top districts.</p> <p>Step 3: Conduct site visits.</p>
<p>Meeting 4: Confirm exemplars and discuss next steps (2 hours)</p>	<ul style="list-style-type: none"> • Review the qualitative findings and come to consensus on whether any finalists are exemplars. • Discuss next steps for communicating and scaling any exemplars’ success.



PART 1: QUANTITATIVE ANALYSES TO IDENTIFY POTENTIAL EXEMPLARS

Part 1 of this process is quantitative analyses. In this iterative series of data analyses and discussions, the team will determine which data to prioritize, review the performance of districts across the state, and use the team’s identified priorities to progressively narrow down the list of all districts until at least one exemplar has been identified.

Meeting 1: Set the Stage

The purpose of this meeting is to introduce the team to this process and to make decisions that will enable the data lead to prepare the initial data analyses in accordance with the state’s priorities and available data. Several days prior to the meeting, the facilitator should provide the group with this guide as prereading.

Step 1: Provide an overview of the process and confirm the team’s goals for identifying SEL/school climate exemplars.

To introduce the team to this process, the facilitator should first lead the group through a high-level overview of the process. Key points for this overview, as described earlier in this guide’s Introduction, include:

- The definition of an SEL/school climate exemplar
- The value of a mixed-methods process in identifying exemplars
- The steps that the team will proceed through

Next, the facilitator should ask team members to confirm the team’s collective goals for identifying SEL exemplars. Before investing time in undertaking the full process, all team members must have a clear understanding of *why* they have set out to identify exemplars and *what* they plan to do with the results. As described on p.3, major goals might include:

1. Communicating the value of SEL
2. Connecting districts to peers for professional learning
3. Building the team’s data capacity

After the team reviews the process and confirms collective goals together, the facilitator may also want to lead the team in defining roles and responsibilities and in establishing agreements for how the team will work individually and collectively.

Step 2: Determine whether to use school-level or district-level data.

Your team will need to determine whether to use school-level or district-level data for the analyses.¹ The main factors to consider are the total number of schools and districts across your state/region and whether your districts vary widely in how many schools or students they serve.

For example, if your team is conducting an analysis across an area serving well over 1,000 schools, analyzing school-level data may be too unwieldy for your team to review, making district-level data the better choice. However, if your team is focusing on a single region of your state, or if your state has fewer than 1,000 schools, a district-level analysis may not offer enough potential data points for comparison, making school-level data the better choice.

Meanwhile, variation in district size can also impact the results of your analysis. For example, if most school districts across your state each serve 1,000–2,000 students across three to five schools, but a few very large districts each serve more than 20,000 students across dozens of schools, a district-level analysis would skew the results toward smaller districts, as one or two exemplar schools could significantly raise the performance of a small district, while one or two exemplar schools would be unlikely to affect the overall performance of a very large district.

Nearly all states have some districts that are significantly larger than others, so considering both of these factors in unison is important. For example, if your state has a very large number of schools and districts, but also has wide variation in district size, you may want to perform a district-level analysis, but stratify your sample so that small and medium districts are analyzed separately from larger districts (and possibly even separately from one another). Your approach should be guided by the goals that your team has established for using the exemplars’ information at the end of the process.

¹ For simplicity, this guide refers to using district-level data as the default unit of analysis, but if the team aims to identify exemplar schools, school-level data may be substituted during each step of the process.

Step 3: Identify all available data.

Together, the team should review the state’s available data measures and their sources. This review should include a brief discussion of each data measure’s strengths and limitations. This will help the team determine which data to prioritize for the analyses. Ideally, the data should be:

- Available for all districts statewide
- Available for several consecutive years (to measure improvement over time)
- Collected, reported, and calculated in a consistent manner from year to year

If these characteristics are not true, the data may still be used, but these limitations should be kept in mind during analysis.

Organize your data into four categories: academic, SEL/school climate, behavioral, and demographic (see Table 2).

Table 2. Data Category Examples and Details

Category	Example measures	Details and why these data are important
Academic	<ul style="list-style-type: none">• Math• English language arts (ELA)• Science• College/career readiness• Graduation	Strongly consider including an academic measure such as math and/or ELA proficiency. Education leaders, accountability systems, and the public all tend to consider academics to be a central priority for student success.
SEL/school climate	<ul style="list-style-type: none">• Student engagement survey• School climate survey	Depending on the survey items, either student engagement or school climate surveys may provide valuable insights on both the quality of the learning environment and students’ (and sometimes adults’) social and emotional well-being.

Category	Example measures	Details and why these data are important
Behavioral (optional)	<ul style="list-style-type: none"> • Attendance • Chronic absenteeism • Suspension 	<p>Including behavioral data is optional, although it can support your SEL findings because SEL is strongly linked with positive behavioral outcomes (Darling-Hammond & Cook-Harvey, 2018). When considering behavioral data to include, note whether your state has identified a particular behavioral outcome (such as improving attendance) as a priority. If your team does not have any statewide SEL/school climate data available, behavioral data can potentially be used as proxy indicators of student engagement and well-being.</p>
Demographic	<ul style="list-style-type: none"> • Free- and reduced-price lunch (FRPL)–enrolled students • Student race/ethnicity • Students who are English learners • Students with disabilities 	<p>Given the well-documented academic disadvantages faced by students with access to fewer economic resources, each district’s enrollment in an FRPL program should be considered in the equity component of your analysis. However, you should consider running additional analyses that incorporate the performance of other demographic groups (e.g., racial/ethnic groups, English learners, students with disabilities), particularly if your state has identified certain groups as a priority for support.</p>

The first three categories of data represent student outcomes. The fourth category, demographic data, will help identify specific districts that are successfully serving different demographic groups. Demographic variables can also be used as statistical controls within regression models if that type of analysis is performed.

When identifying exemplars, consider limiting your list of prospects to those districts whose percentage of students with fewer economic resources is *at least as high* as the state average. Research has established that districts serving higher concentrations of students with fewer economic resources face additional challenges in serving their students well (Borman & Dowling, 2010). Furthermore, districts serving families with greater access to economic resources may have an advantage in achieving notably positive outcomes for students, due in part to their well-resourced

contexts, and so their success may be less useful for other districts' learning. The percentage of students participating in an FRPL program may serve as a good proxy for students' access to economic resources. As an alternative to only identifying exemplar districts that serve large numbers of students participating in an FRPL program, your team may prioritize districts with notably low achievement gaps between these students and students who are not enrolled in the FRPL program.

Step 4: Prioritize which data to use in your analyses.

Generally, exemplar districts will not have noteworthy performance on *all* possible outcome measures. As a result, your team will need to prioritize which measures to use in your analyses. Try to limit your focus to between three and six key measures: for example, one or two academic measures, one SEL/school climate measure, one or two demographic measures, and (optionally) one behavioral measure.

Keep in mind that these prioritized measures are simply your focus areas; your analyses can still ensure that exemplar districts have at least satisfactory performance on other measures. Using data for more than one type of student outcome can help your team find exemplar districts whose SEL/school climate efforts are having a broad impact, which translates into multiple measures of student success.

You can also choose to run different analyses to identify multiple types of exemplars. For example, your team might use this process first to identify exemplary districts in the areas of ELA and school climate, with a focus on positive outcomes for students who are English learners. Your team might then run the analysis a second time, using school climate and suspension data, with the goal of surfacing exemplary districts with positive outcomes for students with disabilities.

As your team selects the measures you will prioritize in your analyses, discuss the degree to which your analyses will utilize performance data from a single year and/or improvement data over a period of multiple years. While improvement data are desirable, such data may not be feasible or attainable, as outlined in Table 3.

Table 3. Pros and Cons of Using Performance Data vs. Improvement Data

Variable	Performance data (single-year data)	Improvement data (longitudinal data)
Pros	<ul style="list-style-type: none"> • Easier to communicate to the public • Does not require multiple years of data 	<ul style="list-style-type: none"> • Can help reveal exemplars that started from a “low point,” where performance data alone would likely not highlight their recent success • May be more effective in revealing districts whose success is due to consistent, intentional improvement efforts, rather than incidental factors
Cons	<ul style="list-style-type: none"> • May be a disadvantage for high-FRPL districts, as they are less likely to be surfaced in any given year’s data • May not represent the district’s regular, ongoing performance level; rather, may represent a unique moment 	<ul style="list-style-type: none"> • Requires multiple years of data • Requires data collected and reported using consistent methods from year to year, which is not always feasible

Step 5 (optional): Consider other desired characteristics.

With your team, determine whether there are other characteristics that you want to prioritize in your exemplar districts. For example, you may want to find small, rural, or urban districts that are outperforming their peers, so that these districts can share their insights with others in similar contexts. For each of these steps, as your team selects which data measures and/or characteristics to prioritize in your analysis, consider the following:

- Do these measures/characteristics align with state priorities?
- Do these measures/characteristics align with local/stakeholder needs?
- Are there other state/regional leaders with whom we should consult?

Conclude the meeting.

Once your team has come to consensus on which data measures and/or characteristics to prioritize, the facilitator can conclude the meeting. After the meeting, the data lead will perform the initial data analyses, discussed in the following section, using the measures prioritized by the team.

Preparation for Meeting 2: Perform the Initial Data Analyses

The following steps describe suggestions for the initial data analyses that the data lead will perform between the first and second meetings. Although this section is primarily intended to provide guidance to the data lead, the facilitator should also read this section, to gain a fuller understanding of the data analyses that the data lead will be sharing at the next meeting. As previously noted, the data lead will perform the data analyses between meetings, so that the full team can review the analyses, discuss the findings, and make data decisions collaboratively.

As with other team meetings in this process, the data lead and the facilitator should meet before Meeting 2 to review the results of the data analyses and to determine how best to share and discuss these results with the rest of the team.

Step 6 (if needed): Transform individual district responses to SEL/school climate surveys into a format suitable for statewide comparisons.

If your SEL/school climate data are not already in a format that lends itself well to statewide calculations, you will need to transform the data into a more accessible format. Some teams may find that their SEL/school climate data, such as data from a student engagement survey or school climate survey, come in the form of individual district responses to each survey question, rather than district-level scores for one or more aggregate SEL/school climate categories. If your team only has data for individual survey questions, Appendix A can assist in transforming the available data into a form that is usable for statewide analysis.

Step 7: Conduct statewide analyses of your prioritized measures.

To establish a sense of the state's landscape of student performance, calculate basic descriptive statistics for each of your prioritized measures. These calculations should include statewide averages and top percentiles, but you may also include any other descriptive statistics (e.g., minimum, maximum, range) that you think could be useful to your team. These analyses can help your team set expectations and establish criteria for exemplar districts' performance.

Be sure to conduct these analyses for all districts in the state, as well as for those districts with percentages of FRPL program participation that are at or above the statewide average (labeled as "high-FRPL districts").

For example, you might provide the team with data displays such as those shown in Tables 4.1 and 4.2.

Table 4.1. Summary of All Districts' Performance

Variable	Math proficiency	ELA proficiency	Student engagement (scoring "committed")*
Maximum	92.0%	95.2%	88.9%
90th percentile	60.1%	64.5%	64.7%
80th percentile	54.2%	56.3%	58.2%
70th percentile	48.5%	50.2%	55.6%
Average (mean)	38.7%	43.1%	48.4%
Minimum	4.4%	9.1%	24.5%

Table 4.2. Summary of High-FRPL Districts' Performance

Variable	Math proficiency	ELA proficiency	Student engagement (scoring "committed")*
Maximum	86.3%	88.1%	85.1%
90th percentile	51.5%	58.4%	59.4%
80th percentile	46.6%	50.1%	54.6%
70th percentile	42.5%	45.2%	52.1%
Average (mean)	31.5%	33.8%	46.2%
Minimum	4.4%	9.1%	26.6%

* The most frequently used statewide student engagement survey has three categories: "committed," "compliant," and "disengaged." Although Tables 4.1 and 4.2 only show the percentage of students scoring at the "committed" level (the highest level), consider conducting an additional analysis for the lowest level, "disengaged."

Consider performing these same analyses for specific subsets of your districts or student populations. For example, you might rerun the aforementioned outcome calculations for the following:

- Only districts with specific characteristics prioritized by the team (e.g., small districts, rural districts, urban districts)
- Only students participating in an FRPL program, statewide
- Only students belonging to other prioritized student groups (e.g., racial/ethnic groups, students with disabilities), statewide

Reviewing these data can help your team understand the average performance levels — and the highest performance levels — among prioritized demographic groups. This includes recognizing any

achievement gaps between outcomes for these students (and districts serving large populations of these students) and their peers statewide.

You may also consider conducting similar analyses using data from several recent years. For example, by reviewing statewide student outcomes over the past three years, your team can look for any important statewide patterns or trends over time.

Step 8: Look for trends across districts’ performance across your prioritized measures.

The purpose of this analysis is to help your team examine the tendencies and characteristics of districts that exhibit high performance in SEL/school climate and other priority measures, compared to other districts.

As an example, you might start with all districts’ SEL/school climate data. First, color-code each district’s SEL/school climate score by quartile. If multiple years of SEL/school climate data are available, include a calculation of each district’s change in performance from the previous year or years, so that your team can observe the district’s current quartile rank as well as whether its performance is improving or declining.

Next, sort all districts by percentage of students participating in an FRPL program, with the districts serving the highest percentages of these students displayed at the top.

The resulting spreadsheet may look like Table 5 (with values filled in for each cell, and with data for all districts across the state or region).

Table 5. Example SEL/School Climate Performance for All Districts Statewide (Color-Coded by Quartile)

District name	SEL/School Climate quartile 2018–19 (see key)	SEL/School Climate change from 2017–18	Total enrollment	% FRPL
District A	Quartile 4	+3%		100.0%
District B	Quartile 3	-2%		99.5%
District C	Quartile 3	-4%		98.2%
District D	Quartile 4	+1%		96.5%
District E	Quartile 3	-3%		96.1%
District F	Quartile 2	+2%		95.4%
District G	Quartile 3	+2%		94.1%
District H	Quartile 4	-1%		93.5%

KEY (Color code for scores)

Quartile 1 (Highest 25%) Quartile 2 Quartile 3 Quartile 4 (Lowest 25%)

When viewing all districts' performance in a color-coded spreadsheet, sorted by FRPL percentage, the team should be able to see at a glance whether there appears to be a relationship between the FRPL percentage in the district and the district's average SEL/school climate scores. This analysis can also provide your team with an early indication as to whether some districts are achieving notably high performance for demographic groups of interest. For example, while all eight of the districts displayed in Table 5 serve high percentages of students in an FRPL program, and most have SEL/school climate performance ranked in the lower quartiles, District F stands out as performing in one of the highest quartiles. Furthermore, District F's performance improved from the previous year — a desirable feature in an exemplar.

Consider sorting this same list of districts by other characteristics, such as by total enrollment. This will allow your team to observe whether there are relationships between those other characteristics and the districts' SEL/school climate performance.

Using SEL/school climate data disaggregated by demographic group, you can also create similar analyses — again, color-coding districts by their performance quartile — for your prioritized student demographics.

Next, create similar analyses for your other priority measures, such as academic or behavioral measures. These analyses will enable your team to observe trends in districts' performance across the state for each of these priority areas.

Finally, in some cases, in addition to these descriptive analyses, the data lead may perform regression analyses to identify districts that are outperforming the statistically predicted performance, potentially including positive outliers.²

The data analyses described throughout this section offer a starting point to launch your team into productive conversations during the next team meeting. As your data and time allow, you can conduct any additional analyses that you feel will help the team understand the state's education landscape and SEL/school climate performance statewide.

For ease of use, you may want to include all of these analyses as separate tabs in a single spreadsheet. For example, your spreadsheet might be labeled with tabs as follows:

- Tab 1: *Statewide Summary — All Priority Measures* (see Tables 4.1 and 4.2 for example)
- Tab 2: *All Districts' Performance — School Climate* (see Table 5 for example)
- Tab 3: *All Districts' Performance — English Language Arts*
- Tab 4: *All Districts' Performance — Suspensions*

Prior to the meeting, be sure to:

- Identify key observations and trends that you want to point out to your team during the meeting. Based on these observations, think about how the data lead would recommend

² Prior research on identifying exemplars has used regression analyses (Podolsky et al., 2019) because these analyses can control for other variables that may contribute to districts' success, such as high levels of resources. However, regression analyses should *only* be performed by data leads with advanced training in inferential statistics, including a complete understanding of working with non-normal outcome variables.

setting minimum thresholds and begin narrowing the list, if it were solely up to you. This recommendation will save the team valuable time and effort during the actual meeting, since you will already have a direction in mind.

- Share your data analyses electronically with your team, so that each team member can review results in advance and can explore the analyses independently during the meeting.

Meeting 2: Review Initial Data Analyses and Determine Criteria and Priorities for Narrowing the List of Districts

The purposes of this meeting are to move toward narrowing the list of possible exemplar districts through an initial review of the data and to prioritize potential exemplar criteria. First, the data lead will provide the team with an understanding of the statewide data landscape, which will help set expectations for exemplars' performance. Equipped with this knowledge, the team can then make decisions on how to set initial minimum thresholds for districts' performance and demographic data. In a later meeting, the team will narrow the list of districts by setting increasingly ambitious thresholds, until one or more exemplars rise to the top.

Ideally, this meeting will be co-facilitated by the facilitator and the data lead. The facilitator can lead the review of the meeting's agenda and objectives, facilitate discussions, and keep track of time, while the data lead can walk team members through the analysis, answer any data-related questions, and note important observations or recommendations.

Step 9: Review initial analyses of statewide data and district data (as developed in Steps 7 and 8).

When reviewing the data analyses, begin with the statewide analyses developed in Step 7. Ask the team to examine statewide performance across key measures and to compare the performance of all districts and of high-FRPL districts (and, if applicable, the performance of all students and of other priority groups of students). These data will illuminate achievement gaps and illustrate the performance levels your team might see among districts that are achieving the most positive outcomes for various demographic groups.

For example, when examining the statewide math performance shown in Tables 4.1 and 4.2, your team will notice that a math proficiency rate of 54.2 percent is equivalent to the 80th percentile for all districts statewide, but ranks above the 90th percentile (51.5 percent) for high-FRPL districts. Consequently, when your team later sets thresholds for what constitutes "high performance" for each priority measure, you will want to consider how these thresholds compare to the performance of districts statewide, as well as how they stack up for districts serving large percentages of priority groups. This difference is not intended to set low expectations for any priority groups; rather, it is intended to provide a statistical cut point for identifying districts that are worth learning more about.

Next, move on to the data displays created in Step 8 (as shown in Table 5) that list individual districts and their performance quartiles. Ask the team to look for patterns in these districts' performance. Observing these patterns — and comparing the performance of districts serving large percentages of

- Are there districts that have both higher performance *and* lower academic achievement gaps than other districts on one or more of our selected measures?

More broadly, as your team explores the data, your observations should be guided by the following questions:

1. What do you notice?
2. Why is this important?
3. How might this inform what we prioritize when identifying districts as prospective exemplars?

Allow your team enough time to explore the data, make observations, build upon one another's ideas, and discuss these observations' implications for the process of setting thresholds and narrowing the list. The data lead should also share any observations, considerations, or recommendations that came up while creating these data analyses.

Step 10: Determine criteria and priorities for progressively narrowing the list.

Equipped with a greater understanding of districts' data across the state, the team can now begin to decide how to narrow down the list of districts. When making these decisions, the team must try to set feasible expectations while also staying true to its goals for what the exemplar should exhibit. While finding exemplars with high performance on all measures may not be possible, your team may be able to expect high performance on priority measures, at least satisfactory performance on other measures, and relatively small achievement gaps or high percentages of priority student populations in comparison with statewide averages.

To make collective decisions about how best to narrow down the list, the team should consider the following questions:

How to use improvement and performance data:

- Based on the collected performance data, do we want to rely more/less on improvement data than we had initially discussed?
- For which measures will we use improvement data, and for which measures will we use performance data?

How best to use the data to focus on priority student demographics:

- Based on the collected district data (particularly in the data displays that reveal patterns across all districts' performance, as described in Step 8), how do we want to ensure that potential exemplar districts are supporting equity for our priority demographics? That is, do we want to limit our list to districts with large populations and/or high percentages of students in these priority groups? Or do we want to focus more on disaggregated performance data (and achievement gap data) for these students, regardless of how many are enrolled in any given district?

Where to set thresholds for various outcome measures:

- For our priority outcome measures, what should our minimum thresholds be — that is, what are we considering notably positive outcomes or high performance?³ When making these calculations, do we want to use all statewide data, or only subsets of the data — such as only data from districts with above-average FRPL percentages?
- Which nonpriority outcome measures might we also want to include in the analysis (such as additional academic or behavioral measures)? This can ensure that the district has at least satisfactory performance on a wider variety of outcomes.⁴

Record each of your decisions in a shared document as you build progressively through the conversation. See Table 6 for an example of such a list, in which the team’s goal is to identify an exemplar district where FRPL and Latinx students feel a strong sense of belonging (measured through school climate surveys) and demonstrate notably high performance in ELA (measured through above-average proficiency rates and lower-than-average achievement gaps). If possible, the team would like to identify a fairly small rural district. Consequently, the team’s priority measures are FRPL student data (default demographic measure), Latinx student data (priority demographic measure), school climate scores (outcome measure), and ELA performance (outcome measure).

Beyond these priority measures, the team will also examine districts’ math performance and suspension rates, and will prioritize districts that are smaller and rural. Checking for satisfactory performance on these additional two measures (non-priority outcome measures) can help ensure that the selected exemplars are supporting student success and equity across a broader range of measures.

The list in Table 6 reflects the team’s decisions for how to narrow down the list of all districts by setting minimum thresholds and other criteria. The data lead can determine the most appropriate sequence for applying each of these criteria to narrow down the list, with appropriate input from the team as needed.

³ If using regression analyses, rather than setting thresholds, the team can simply decide to look for districts that are outperforming the regression line on each priority measure.

⁴ An example of “satisfactory” performance could be at/near the state average.

Table 6. Sample List of Team Decisions on How to Prioritize Various Data

Data	How our team will use the data in the final quantitative analysis	Priority
<p>Default demographic measure: FRPL</p>	<ul style="list-style-type: none"> Require FRPL enrollment at or above the statewide average. Use disaggregated outcome data (specifically measuring FRPL) when comparing districts' performance. 	<p>Medium-High</p>
<p>Priority demographic measure: Latinx students</p>	<ul style="list-style-type: none"> Do not set a required minimum for how many Latinx students are enrolled. Use disaggregated outcome data (specifically for Latinx students) when comparing districts' performance. 	<p>Medium</p>
<p>Priority outcome measure: School climate <i>(Priority student groups)</i></p>	<ul style="list-style-type: none"> Aim for lower-than-average achievement gaps between Latinx students or students participating in a FRPL program, compared to aggregate student outcomes. <p>and/or</p> <ul style="list-style-type: none"> Aim for Latinx and/or FRPL student outcomes that are in or above the 70th percentile of Latinx and/or FRPL student outcomes statewide. 	<p>High</p>
<p>Priority outcome measure: School climate <i>(All students)</i></p>	<ul style="list-style-type: none"> Aim for aggregate student outcomes above the state average. 	<p>Medium</p>
<p>Priority outcome measure: ELA <i>(Priority student groups)</i></p>	<ul style="list-style-type: none"> Aim for lower-than-average achievement gaps between Latinx and/or FRPL outcomes and aggregate student outcomes. <p>and/or</p> <ul style="list-style-type: none"> Aim for Latinx and/or FRPL student outcomes that are in or above the 60th percentile of Latinx and/or FRPL student outcomes statewide. 	<p>Medium-High</p>

Data	How our team will use the data in the final quantitative analysis	Priority
Priority outcome measure: ELA <i>(All students)</i>	<ul style="list-style-type: none"> Aim for aggregate student outcomes above the state average. 	Medium-Low
Other outcome measures: Math, suspensions	<ul style="list-style-type: none"> Aim for lower-than-average achievement gaps between Latinx and/or FRPL outcomes and aggregate student outcomes. and/or <ul style="list-style-type: none"> Aim for Latinx and/or FRPL student outcomes that are above the average outcomes for Latinx and/or FRPL students statewide. 	Low
Other priority characteristics	<ul style="list-style-type: none"> Aim for rural districts where possible. Aim for small (below-average enrollment) districts where possible. 	Low
Improvement versus performance data	<ul style="list-style-type: none"> Rely primarily on performance data. Check to make sure that districts' school climate scores are either maintained (with marginal room for natural variation) or improving for at least three of the past four years. 	Medium

These decisions will guide the data lead’s upcoming analyses and adjustments to minimum thresholds. At this point, creating modest minimum thresholds is a better approach for finding potential exemplars, as the data lead will apply increasingly ambitious data thresholds to narrow the list (rather than eliminating all possibilities up-front with thresholds that are too rigorous). To do so, the data lead will need to know how the team wants to prioritize each of the criteria. The Priority column on the right side of Table 6 records the team’s decisions about which indicators the group most wants to prioritize and which indicators the group considers lower priority. This will assist the data lead in knowing which thresholds to adjust first.

For example, using Table 6, if applying the original thresholds and criteria results in a list of 30 districts, the data lead will need to know whether to first raise the minimum threshold for school climate scores or whether to first look for districts with smaller academic achievement gaps. According to the Priority column, the data lead should first raise the minimum threshold for school climate scores, as the team has identified school climate as a slightly higher priority than academic achievement. In most cases, this ranking of the team’s priorities will help the data lead decide how to adjust various thresholds without having to go back to the team for consultation.

It is also possible that after setting these initial minimum thresholds, the data lead will find no districts, or very few districts, that fulfill all these criteria. In this case, the data lead will need to begin lowering thresholds or deprioritizing certain criteria. It is important to note that lowering the thresholds does not mean that you are “cheating” by lowering expectations for students, or that your state does not have exemplars. Remember the following:

- **Lowering the thresholds does not mean you are highlighting less-noteworthy districts.** It may simply indicate that your initial thresholds were unrealistically high, even for exemplary districts.
- **It is possible that most districts in your state are still in the early stages of implementing SEL/school climate efforts.** Districts that show signs of improvement may still offer valuable lessons, even if they are not yet experiencing extraordinarily notable student success. After a district successfully implements positive new strategies, the results may not be reflected in the district’s student outcome data for quite some time.
- **Once potential exemplars have been identified, the qualitative analysis in Part 2 will verify that the district is indeed implementing intentional SEL/school climate work and other school improvement efforts.** Remember that the quantitative data analysis serves to identify *potential* exemplars — not to guarantee that, based on student outcomes alone, these districts are exemplars. The qualitative data analysis will help verify this.

Once the team has come to a consensus on desired data thresholds, criteria, and the priority rankings for each of the criteria, the meeting can conclude.

Preparation for Meeting 3: Narrow the List of Districts Through Further Data Analysis

Step 11: Apply the team’s desired thresholds and criteria to narrow down the list of districts.

The data lead can now apply the team’s minimum thresholds and criteria to the full list of districts, raising or lowering thresholds as needed to develop a short list of no more than a dozen districts.

As previously noted, the data lead can adjust thresholds, based on the team’s decisions about how to prioritize them. However, the data lead should also carefully examine the characteristics of the districts that remain on the list after the initial thresholds and criteria are applied.

For example, in the scenario described in Step 10, in which the data lead is narrowing a list of 30 districts, the team had indicated that higher school climate performance is the top priority, followed by smaller academic achievement gaps. Nevertheless, the data lead may keep a district that has extraordinarily small academic achievement gaps on the list, even if other districts have higher school climate performance. In this scenario, the data lead notices something compelling in the data and makes a decision on their own about what to do with that information. However, depending on the data and the team, there may be cases in which the data lead and the facilitator decide to bring a longer list back to the team to further discuss the relevant observations and to make a collective decision about how to adjust thresholds and criteria.

Step 12: For the narrowed-down list of districts, include additional data to provide a more comprehensive picture of each district.

Once the data lead has finalized the short list of no more than a dozen districts, the data lead should prepare a data display that includes the data used for the analysis (see Table 6 for an example) as well as additional publicly available data. The purpose of using these data is to provide a fuller picture of each district. For example, including the following can be helpful:

- Additional student demographic information (e.g., percentages of students in all racial/ethnic groups, percentage of students with disabilities, percentage of students who are English learners)
- Numbers of schools and their school levels (e.g., K–8, high school) within each district
- Additional outcome data not listed in the table (e.g., graduation rates, attendance)

Such data can help the team ensure that its exemplar finalists sufficiently represent the characteristics of other districts across the state. For example, during the team’s final review, such data might show that, among the top dozen districts, the three with the most outstanding performance are all elementary school districts. If the team hopes to identify at least one exemplar serving K–12 students, this can prompt the team to look beyond those top three districts and include at least one exemplar finalist that also serves middle school and/or high school students.

Meeting 3: Review Final Results of Quantitative Analysis

In this meeting, the team will wrap up the quantitative data analysis process and will prepare for the qualitative analysis in Part 2. Most importantly, the team will confirm a final list of potential exemplar districts and will determine which of these districts to proceed with in Part 2.

First, as previously described, the data lead will lead the team in reviewing the current short list of potential exemplar districts. Together, the team should review the performance data and characteristics of each district on this final list, to confirm whether they reflect the team’s priorities for an exemplar district.

Depending on how many districts are on the final list, the team may also want to rank which ones seem like the most promising exemplars for carrying into the qualitative analysis of Part 2 — a significant investment of time that should only be applied to a handful of top candidate districts. The team may choose to use a rubric to guide this final ranking process. Table 7 offers a sample, with the team rating each district’s key attributes from “1” (this attribute does not reflect what the team would like to see in an exemplar) to “3” (this attribute fully reflects what the team would like to see in an exemplar).

Table 7. Sample Rubric for Ranking Potential Exemplar Districts

Data category	Rating (1–3)	Notes
% FRPL		
School climate – overall		
School climate – achievement gaps		
School climate – change over time		
Academics – overall		
Academics – achievement gaps		
Academics – change over time		
Other factors (e.g., size, other student outcomes)		
Summary (most significant pros/cons)		

KEY: 3 = Exemplar, 2 = Maybe an exemplar, 1 = Not an exemplar

If the team begins the meeting with a list of 10 or more districts, the team should decide on its top four or five to proceed with in Part 2; however, if the team begins the meeting with a list of only four or five districts, ranking them may not be necessary. If none, or few, of the top districts meet the qualitative criteria after the team completes Part 2, the team can then proceed with some or all of the districts further down on the list.

Finally, the facilitator will share an overview of the qualitative analysis process described in Part 2. The team will then determine which of its members will be involved with the qualitative analysis, define their roles and responsibilities, and discuss the timeline and next steps.



PART 2: QUALITATIVE ANALYSIS TO VERIFY AND FINALIZE EXEMPLARS

In Part 2 of the exemplar identification process, your team will take the short list of potential exemplars that it developed in Part 1 and use qualitative data to verify whether these districts are indeed valuable exemplars from which others can learn. While the potential exemplars' positive outcomes suggest that they are doing commendable work, your team will want to both validate their outcome data and confirm that these outcomes are indeed linked to intentional SEL/school climate work and other whole-person efforts.

Using qualitative data collection and analysis, your team will gather a wealth of information on each identified district's strategies, implementation efforts, and results. To enhance the validity and reliability of your findings, this information will be gathered from multiple sources, including individuals whose perspectives span a variety of roles and levels within the district.

If possible, to reduce potential biases in, and enhance the validity of, the qualitative data collection and analyses, multiple members of your team should be involved with each of these steps. These team members may be different from those who participated in the analysis of quantitative data in Part 1, but the data lead and the original facilitator should remain involved, to maintain continuity and to answer questions about the quantitative analysis. Ideally, the Part 2 team members will have experience in coaching, technical assistance, and/or qualitative research, and should know how to identify best practices related to SEL and school climate when they see them in action.

Before you begin collecting qualitative data, meet with the full Part 2 qualitative team to decide on the criteria that will guide your analysis. These criteria describe the ideal qualitative characteristics that you would like your exemplar to exhibit. For example, these criteria might include the following:

- Investments in building staff capacity in SEL and related areas
- Systemic, equitable implementation of policies and practices
- Alignment and coherence across the district’s whole-person efforts, in which all staff have a common understanding of the district’s vision and how related initiatives — such as trauma-informed practices and restorative justice — fit together to contribute to achieving that vision

Exemplars need not exhibit all of these qualitative criteria. However, having specific criteria to look for will help guide your observations and analysis. Ultimately your team must determine whether the district is (or whether some of its school sites are) undertaking work that would be valuable to highlight and share across the state.

Step 1: Conduct background research on each district and its work.

This step will generate preliminary qualitative data about the district’s whole-person initiatives, while also surfacing any concerning characteristics that may make it an unsuitable exemplar to highlight across the state.

For each district on your list, you can begin by reading through publicly available sources — such as news publications in the area and the websites of local education organizations — for information about the district’s intentional improvement efforts, SEL/school climate work, and other whole-person initiatives. You should also reach out to state and/or regional leaders who have worked with this district and ask whether they have any insights into positive, relevant efforts within the district. For this step, a simple and brief conversation is fine — you do not need a full list of interview questions.

In addition to looking for positive data, your team will look for any potential concerns about the district, such as ethical breaches, inequitable or problematic practices for certain student groups (e.g., failure to provide the least restrictive environment for students with disabilities), or fiscal distress.

If you discover qualitative data that appear to render the district unsuitable as an exemplar, share this information immediately with the rest of your team. If you decide to not proceed with some or all of the districts on your list — at this point or at any other point in Part 2 — you can always go back to the earlier quantitative analysis and expand your list of potential exemplars.

Step 2: Conduct video or phone interviews with leaders from your final top districts.

At this point, your team can reach out directly to leaders from the potential exemplar districts to schedule a conversation in which you will learn more about their work and any efforts that may have led to their district’s positive outcomes in the areas of SEL/school climate.

When reaching out to district leaders to request an interview, begin by commending them for their district’s notably positive student outcomes. It is important to express that your reason for getting in touch is positive, with the potential for the district to gain widespread recognition for its work. However, be clear that the district is still only a *potential* exemplar.

Consider reaching out to the district superintendent as a first point of contact (see the sample email template in Appendix B), but plan on interviewing not only that person but also a sample of the

district's other relevant leaders. Individuals included in the sample should hold a variety of roles and, if possible, should represent a variety of backgrounds. You may also want to interview leaders from several individual school sites.

During each interview, your goals should be to:

- Begin to establish a positive relationship with the district and/or site leaders.
- Collect more detailed information about the district's relevant work.
- Listen for whether this work is occurring in a consistent manner systemwide, or whether implementation is still early and/or not yet systemwide.

Suggested interview questions include the following:

1. What is your role in the district?
2. What is your district's vision or goal for the students and families you serve? (Listen for alignment with vision or goals set at the state level.)
3. Your district was identified as having notably positive [SEL/school climate] outcomes. What do you believe has contributed the most to these outcomes in your district?
4. Has your district had, or does your district currently have, initiatives specifically focused on SEL or school climate? If yes, when did this work begin? What prompted your district's focus on this priority?
5. Can you please describe your district's SEL and/or school climate work in more detail? What strategies did you employ? New programs, policies, curriculum?
6. How would you describe the current implementation status of these initiatives? For example, are they occurring mostly at a few individual school sites, or is there consistent, districtwide implementation? (Listen for consistent, systematic processes and structures to support districtwide implementation. If it turns out that the work is mostly occurring at a few sites, be sure to interview leaders at those sites. Your team may want to simply highlight those sites — rather than the whole district — as exemplars.)
7. Can you please describe any efforts to build adults' capabilities in SEL or school climate, such as professional development or trainings?
8. If staff from another district were to visit schools in your district, what concrete actions might they see, among staff, educators, or students, that demonstrate your district's focus on SEL or school climate?
9. How has your district connected this work to other whole-person initiatives, such as family/ community engagement or mental health support?
10. Do you use data to inform your SEL or school climate work, including ongoing implementation efforts? If so, how do you monitor whether your district's strategies are working?
11. What has been most challenging about your district's implementation efforts? How did you overcome those challenges?

12. If other districts are interested in learning from your district's SEL or school climate work, what do you feel are the key takeaways from the work?
13. What other benefits, if any, have you seen because of these efforts?

After all interviews are complete, briefly discuss, with any other team members participating in the qualitative process, what you have all heard. If you determine together that the district is indeed implementing intentional SEL/school climate efforts — and that the extent of its efforts may be valuable for others to learn from — your team is ready to proceed to Step 3. (As previously noted, if you discover any concerning practices that may render a district unsuitable as an exemplar, discuss them with your team immediately and decide whether you want to revisit another potential exemplar.)

Step 3: Conduct site visits.

The purpose of this step is to collect observational data and other field data to fully understand and verify implementation of the efforts that district and/or school leaders described during the interviews. Work with the interviewed leaders to arrange visits to at least one or two school sites within the district. During these visits, plan to collect additional qualitative data through activities such as the following:

- Focus group conversations or one-on-one interviews with site leaders, school staff, students, families, and/or other stakeholders
- Observations of classroom environments and instruction
- Observations of professional development activities
- Collection of artifacts (e.g., districtwide handbooks on school climate, instructional materials, student work samples related to SEL)

When observing instruction and other activities, use of an observational protocol⁵ that aligns to the criteria established by the qualitative team can help guide you in what to look for in the classroom environment, teacher behaviors and instructional strategies, and student behaviors.

Meeting 4: Confirm Exemplars and Discuss Next Steps

After your site visits are complete, reconvene the full team to share the results. Together, review your team's qualitative criteria as well as the specific data that you have obtained about each district through background research, interviews, and site visits. Discuss whether your team feels that this district (or any of its school sites) is implementing SEL and/or school climate efforts from which others might learn.

Congratulations! Combined with the comprehensive quantitative analysis previously described in this guide, you should now feel confident in determining whether you have uncovered one or more valuable exemplars. Once your team has made this determination, you can discuss roles and timelines for communicating about the exemplar's success, as discussed in the following section.

⁵ If time allows, in addition to using an observational protocol to observe classrooms, team members might consider using Building Equitable Learning Environments (BELE) Network's Shadow Student protocol (found at <https://equitablelearning.org/pages/B6UXfR98>) to gain insight into students' everyday experiences.



NEXT STEPS: COMMUNICATE AND SCALE THE EXEMPLARS' SUCCESS

The purpose of this guide's process is to identify exemplars that can help other districts learn from and scale up successful strategies for whole-person work. As discussed on p.3, your team might use exemplars to communicate the value of SEL and related strategies, and/or to connect districts to peers for professional learning. Once the team has identified one or more exemplars, revisit the team's identified goals and discuss whether these goals have changed. Having clear goals in mind will help the team determine next steps and any potential products.

Whether you choose to create media (such as publications or videos) that communicate the value of SEL by sharing the exemplar's story or to develop professional learning opportunities involving the exemplar, you will likely need some commitment from and collaboration with local leaders of the exemplar district(s). Fortunately, the interviews and site visits from Part 2 of this guide provide opportunities to begin building positive relationships with these leaders. You may build on that initial rapport in subsequent communication with these leaders as you develop deliverables that help share their strategies and successes with others.

As you work to share information about the exemplar district(s) in ways that can fuel adoption of successful strategies by other districts, consider the following best practices:

- **Establish your key messages.** Determine which key whole-person strategies, practices, and lessons from these exemplar districts are most important to communicate to other districts across the state. These takeaways will be based both on what practices and outcomes you want to scale up and on what messages will be most relevant and applicable to other districts. Identify big-picture ideas that are clear and coherent, as well as any concrete details or innovative strategies that seem valuable to highlight. For example, your team might determine that establishing positive, responsive relationships is a major focus in some or all exemplar districts and may spotlight one district's successful mentoring project pairing older and younger students as an example of that work.

- **Consider which audiences would be valuable to reach.** Leaders from other districts will naturally be a top-priority audience, as the exemplar’s strategies and experiences can help inform their own design and implementation of whole-person initiatives. However, sharing the exemplar’s story with families, educators, state political leaders, and other stakeholders can also help enhance public understanding of — and support for — SEL and other whole-person strategies.
- **Map the existing communication channels in your state.** These might include communications from state or regional education agencies, education associations, or advocacy groups. Consider how best to leverage these channels in spotlighting exemplar districts and sharing their learnings.
- **Consider a variety of media formats to reach a variety of relevant stakeholders within other districts, including district leaders, school board members, principals, teachers, other school staff, and families.** These media formats might include the following:
 - Articles or case studies
 - Written interviews with district leaders
 - Podcasts or videos featuring the district’s and its schools’ work
 - Online toolkits, which may include district-created materials that the district is open to sharing with others
 - Webinars (held jointly with the state or regional education agency and the exemplar district or districts)
 - Conference presentations

With the exemplar district’s permission, create a press release or otherwise notify local media about the district’s great work and its generosity in helping others learn from its success. This can help the exemplar district earn well-deserved public recognition for its efforts.

- **Collaborate with the exemplar district to host learning visits for other local leaders.** Work with each district to create a structured agenda for each visit, to spotlight its exemplary practices. Ask visiting leaders to participate with an intentional focus on identifying strategies to replicate in their own districts. Suggested activities include classroom observations, panel discussions with district or school staff and students, opportunities for informal conversations with district and school staff and students (such as over lunch), and time for reflection and action planning. Provide observational protocols and other tools to guide visiting leaders in their learning. (For more resources on organizing learning visits, see Appendix C.)

During or after a learning visit, have representatives from the visiting district share specific observations of what they admired and learned from the exemplar district. This can make the visit a positive and reaffirming experience for the exemplar district’s staff, while also informing other communication efforts.

- **Consider integrating exemplars into existing technical assistance and professional development work.** Offer exemplar information and learning visits to districts in your region or state that are already receiving technical assistance and are focusing on SEL and/or school climate as key strategies. As with other professional learning experiences, visitors may find that no matter how eye-opening a one-time learning visit can be, it is not sufficient to enable full implementation. However, integrating this work into existing technical assistance structures (e.g., job-alike professional learning communities, ongoing support from state and regional education agencies) can enable visitors to keep a sustained focus on these efforts and receive the support they need over time.
- **Celebrate the exemplar district, its leaders, and its staff.** Acknowledge the time and energy that the district contributes when it invites others to learn from its success. Emphasize the tremendous impact that the district can have in helping advance SEL and school climate work across the state. Discussing their work with others can provide exemplar district staff with meaningful chances to reflect on their work, but you should also consider other ways to make these collaborative experiences valuable for them — not just for visitors.



CONCLUSION

Using the data-driven process outlined in this guide, your team can uncover and highlight school districts that have embraced a whole-person approach, which can be an essential strategy to achieve better and more equitable student outcomes. For these reasons, these districts can and should serve as models for others. Your team can help ensure that this happens, by intentionally surfacing, examining, and sharing these exemplars' work with other districts across your region or state.

Along the way, remember that you can adapt the process to fit your state's context and needs. Feel free to look for exemplary schools rather than districts, adjust the number of meetings, and conduct any combination of analyses that you feel will best help your team make meaning from your state's available data. Once you have finalized the selection of exemplars, be sure to invite other local districts to participate in learning visits, so that they can gain inspiration and information that lead to real action. Not only are these exemplar districts making a difference within their own communities, but through their partnership with your team, their leaders and staff can help improve school environments, student and staff well-being, and other learning outcomes across an entire region or state.

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APPENDIX A: TRANSFORMING INDIVIDUAL DISTRICT RESPONSES INTO STATEWIDE SEL/SCHOOL CLIMATE DATA

Some teams may find that their SEL/school climate data, such as data from a student engagement survey or a school climate survey, are in the form of district-level averages of student responses to individual survey questions, rather than district-level scores that have been aggregated into multiple SEL/school climate categories. If your team only has data for individual survey questions, the following steps can assist in transforming the available data into a form that is usable for statewide analysis.

- 1. Determine which survey sections to include.** Include sections directly related to social/emotional well-being and school climate. Exclude sections related to physical health, risk behavior, and other factors that are less directly related to SEL.
- 2. Consider categorizing relevant survey responses into a few key categories.** For example:
 - Cognitive engagement
 - Emotional well-being
 - Physical safety
 - Social connectedness
 - Support from staff
- 3. For each question, convert student response percentages into composite scores.** For example, if responses range from “Strongly disagree” to “Strongly agree,” you might convert them to point values ranging from 1 to 4 and find the average point value for each question, based on all students’ responses (see the following example).

Category: Social connectedness. *Survey question: “I feel socially accepted at school.”*

Response	Respondents	Point value
Strongly agree	20%	4
Agree	45%	3
Disagree	20%	2
Strongly disagree	15%	1
Composite Score	2.7	

The composite score for this question, based on the responses of all students in the district, is 2.7.

4. **Create a composite score for all questions included in a category by calculating a composite score for each question and then finding the average (mean).** The district's final school climate survey scores may end up looking like this:

- Social connectedness: 2.7
- Staff support: 3.2
- Emotional well-being: 2.8

Note that SEL/school climate data that are reported as composite percentages may need no transformation at all. Some surveys, such as the student engagement survey used in several states, report student outcomes as district-level percentages (e.g., 55 percent of the district's students are "engaged," while 35 percent are "disengaged"). You can use these data directly, in much the same way as you would use academic proficiency scores.

APPENDIX B: SAMPLE EMAIL TO THE SUPERINTENDENT OF A POTENTIAL EXEMPLAR DISTRICT

Subject line: Request to interview your district on SEL and school climate practices

Dear *[Superintendent Name]*:

I am reaching out on behalf of an initiative at the *[state department of education]* to identify districts that have proven successful in their implementation of social and emotional learning (SEL), school climate efforts, and related whole-person initiatives. Once we identify exemplary districts, our hope is to highlight and celebrate these districts' success and share their strategies across the state.

I am pleased to share that after analyzing statewide data from the student engagement survey, your district stood out as having particularly high levels of student engagement (cognitive, behavioral, and emotional), which we are using as statewide measures of SEL. **Due to your district's commendable results in this area, your district has been identified as a potential exemplar candidate.**

We would like to speak with you and other leaders from your district to learn about your district's SEL practices. **If your district is willing to participate, please respond to this email to let me know your availability for a one-hour interview.**

Also, we would greatly appreciate if you could share a list of leaders in your district in addition to yourself — such as assistant superintendents, directors, and potentially one or two school principals — with whom you think we should also meet.

Thank you very much for your time and consideration, and please let me know if you have any questions. If your district is chosen as an exemplar, we look forward to highlighting some of the great work taking place in your district.

Best regards,

[Your Name]

[Add name of initiative/team and/or names of other team members, if relevant]

APPENDIX C: RESOURCES FOR ORGANIZING LEARNING VISITS

Learning in Action: A Guide to Conducting High-Impact School Visits

Great Schools Partnership for the New England Secondary School Consortium (2016)

<https://www.greatschoolspartnership.org/wp-content/uploads/2016/07/LIS-Learning-In-Action.pdf>

The Site Visit: Host School (Spotlight Schools)

Wisconsin Department of Public Instruction (2014)

https://dpi.wi.gov/sites/default/files/imce/schools-of-recognition/pdf/spotlight_schools_host_school.pdf

The Site Visit: Visiting School (Spotlight Schools)

Wisconsin Department of Public Instruction (2014)

https://dpi.wi.gov/sites/default/files/imce/schools-of-recognition/pdf/spotlight_schools_visiting_school.pdf