

Pathways of Change

Many paths to achieving desegregation and integration—
A resource to support strategic planning



Maliha Ali, Chris Paek, Trenita Childers, Paula Dias, Emily Melluso, and Megan Sambolt

Introduction

Seventy years after the Brown vs. Board of Education ruling ended legalized racial segregation in U.S. public schools, communities and schools in the United States are still separated by race and socioeconomic status (Potter, 2024). Leaders and practitioners working to ensure that all people can thrive in desegregated and inclusive environments need tools to help them address these persistent divisions, with a focus on both the contributing factors and the consequences of segregation. This Pathways of Change resource is designed to help gauge the full complexity of segregation to determine and plan interventions that are collaborative, multilevel, and cross-sector.

How to use the Pathways of Change resource in your work

Researchers and practitioners can use this resource to (a) learn about the diverse initiatives advancing desegregation and integration throughout the country and (b) better map out the factors that may influence the strategic planning and success of their own initiatives.

This Pathways of Change resource has two main sections:

- **Section 1** organizes desegregation and integration initiatives by type to describe the different kinds of education and housing initiatives in the Bridges Collaborative landscape (see “Desegregation and Integration Initiatives” on the next page). The section includes a **visual landscape** of different desegregation and integration initiatives that are being implemented at the public policy, community/organizational, and interpersonal/individual levels. It also introduces [Appendix A](#), an accompanying **glossary** that describes each type of initiative in greater detail and provides examples for reference.

The landscape provides a bird’s eye view of different initiatives and can be used to illuminate potential connections or complementary elements across initiatives. It may also help practitioners

DEFINITIONS

For the purpose of this resource, desegregation and integration are interrelated but distinct terms.

Desegregation: The removal of barriers to allow students of different races to attend the same school. Indicators of school desegregation focus on the demographic makeup of the school and its corresponding neighborhoods.

Integration: The creation of educational communities where students and adults of different races teach, learn, and collaborate to advance the educational experience of the entire student body. Indicators of integration include diverse school staff, inclusive curricula, and incorporation of student voices.

consider the scope of an existing initiative or reveal opportunities to collaborate with other organizations and think about the collective impact of different approaches.

- **Section 2** includes a facilitation guide to help practitioners identify their own pathway of change toward desegregation and integration. Unique external and internal systemic factors (e.g., context), barriers, and facilitators give each initiative a unique pathway of change. The facilitation guide is designed to help practitioners map those unique pathways and explore what different initiatives could look like in their own local context. For easy use, [Appendix B](#) includes all the worksheets from each of the steps in the guide.

When applied together, sections one and two will help practitioners understand the range of initiatives for desegregation and integration, gauge their own initiatives with respect to other opportunities for change, and recognize systemic factors that influence the implementation of their desegregation and integration efforts to determine their own specific implementation approach or pathway of change.

DESEGREGATION AND INTEGRATION INITIATIVES

These initiatives include a range of approaches that address residential and school segregation and work toward desegregation and integration for communities and schools. Initiatives include approaches at the policy, community or organizational (e.g., school district), and interpersonal or individual levels. A broad understanding of these opportunities for change and intervention can (a) guide strategic planning for and implementation and evaluation of desegregation and intervention initiatives and (b) support collaboration and complementary actions among partners who work across the housing and education sectors.

The Bridges Collaborative

An initiative of The Century Foundation, the Bridges Collaborative is a coalition of various organizations that are working to advance racial and socioeconomic integration and equity in U.S. schools. The Collaborative features over 50 organizations, including school districts, charter schools, and fair housing organizations.



Section 1. The Landscape of Desegregation and Integration Initiatives

Desegregation and integration initiatives include various policy, programmatic, and service delivery efforts. This section summarizes desegregation and integration initiatives on two fronts: housing and education. Drawing from diverse efforts of members of the Bridges Collaborative, **Exhibit 1** illustrates the landscape of desegregation and integration initiatives and organizes them at three levels of change: public policy, community and organization (e.g., public school district), and interpersonal and individual.

UNDERSTANDING THE LANDSCAPE OF DESEGREGATION AND INTEGRATION INITIATIVES

Approaches to desegregation and integration initiatives often differ because they are implemented within complex systems that are impacted by (a) societal, community, and individual level factors and (b) multilevel interactions between these factors. Drawing from the socioecological framework (e.g., see [CDC, n.d.](#); [Harper Browne & O'Connor, 2021](#)), the landscape ([Exhibit 1](#)) of desegregation and integration initiatives reflects implementation at three levels: public policy, community and organization, and interpersonal and individual.

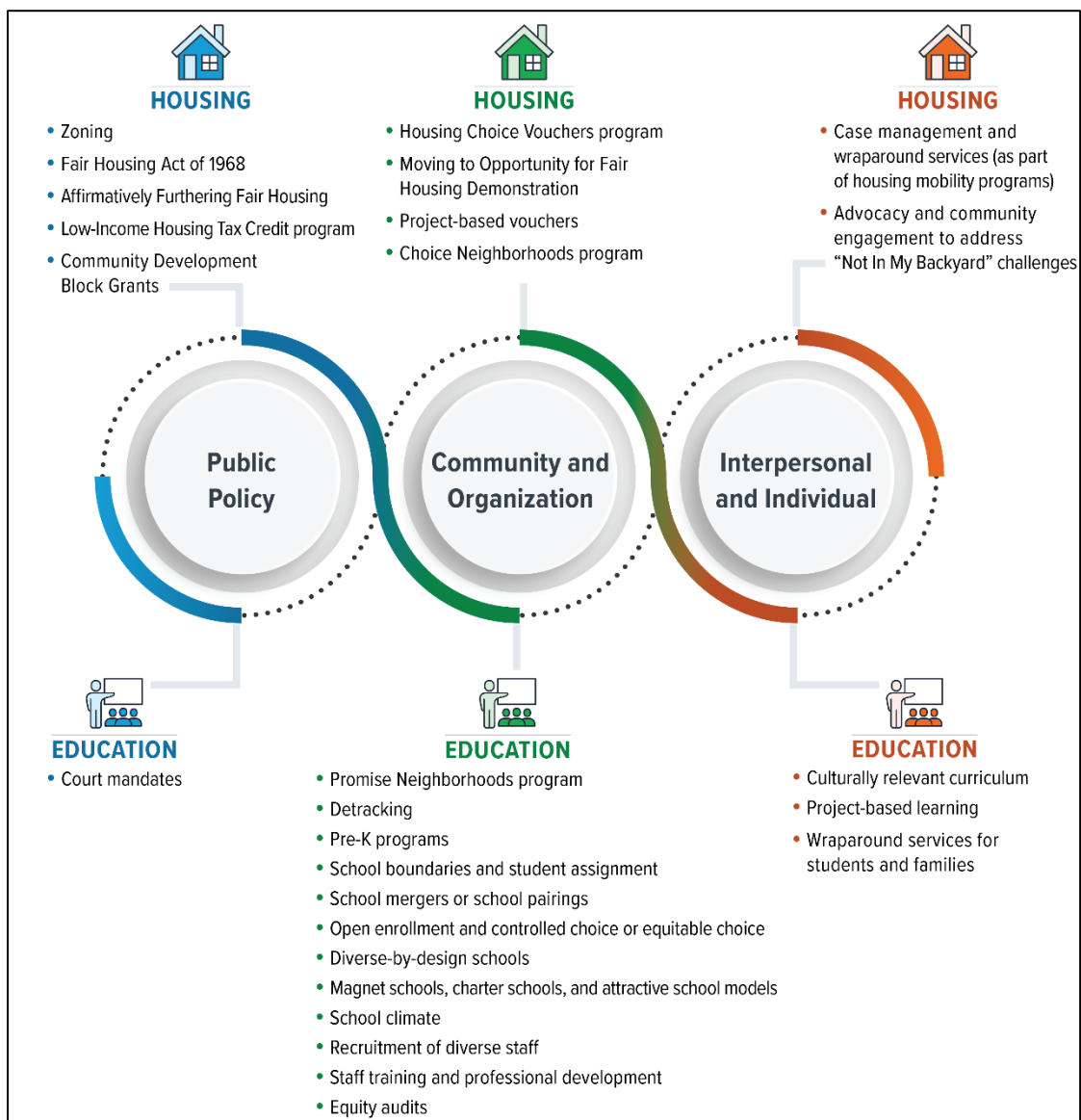
- **Public policy:** Policy or legislative approaches that are enacted at the federal, state, or local levels. Policy can influence residential segregation and school segregation at the macro level through regulations, increased access, or economic incentives designed to affect large populations. Examples include zoning of neighborhoods and court desegregation orders.
- **Community and organization:** Programs that involve communities and institutions, such as school districts, and are designed to achieve desegregation and integration in neighborhoods and public-school systems. Examples include neighborhood revitalization efforts and school boundary redesign.
- **Interpersonal and individual:** Services and supports that are designed to ensure individuals have access to relevant programs for housing and education needs to help them thrive in integrated settings. Examples include case management and wraparound services for families using housing vouchers or attending new schools.

Development Process

The project team reviewed the desegregation and integration efforts of members of the Bridges Collaborative that participated in the cohort between 2022 and 2024. The team reviewed transcripts of qualitative interviews and artifact information from 45 organizations (11 housing and 34 education) to identify desegregation and integration initiatives, the levels at which they were implemented, and the types of strategies they employed. The team also reviewed articles and reports from gray literature to identify other residential and school desegregation efforts. The team synthesized the information from these sources to develop desegregation and integration initiative categories, descriptions, and examples.

Exhibit 1 provides a visual landscape to help practitioners get a wider view of the variety of desegregation and integration efforts across the housing and education sectors. The categorization of desegregation and integration initiatives within these three levels is meant to reflect the levels of implementation and, thereby, the extent to which initiatives involve either whole populations, specific community members, or individuals. These categories are not set in stone. Many initiatives at the community level may have their origins at the policy level or be implemented at an individual level. Other initiatives could be moved to different categories based on nuances in implementation or on the experiences of the practitioners who are implementing them.

Exhibit 1. A Landscape of Desegregation and Integration Initiatives Across the Housing and Education Sectors



Note: This figure includes desegregation and integration initiatives that represent the efforts of members of the Bridges Collaborative. It does not include initiatives that are implemented by other organizations who are not part of the Collaborative.

Examples of Different Desegregation and Integration Initiatives

Exhibit 2 summarizes and provides examples of the different types of desegregation and integration initiatives. For detailed descriptions of each type of initiative, please refer to [Appendix A](#). Examples in Exhibit 2 link to descriptive narratives and other resources that detail specific strategies or elements of initiatives from member organizations of the Bridges Collaborative.

Exhibit 2. Examples of Desegregation and Integration Initiatives

Types	Examples
 Policy Level: Policy or legislative approaches that are enacted at the federal, state, or local levels and affect large populations through regulations, increased access, or economic incentives.	
Housing	
Zoning	Elm City Communities, Connecticut
Fair Housing Act of 1968	Inclusive Communities Project, Texas NestQuest Houston, Texas
Affirmatively Furthering Fair Housing	Elm City Communities, Connecticut
Low-Income Housing Tax Credit program	Baltimore Regional Housing Partnership, Maryland
Community Development Block Grants	City of Cambridge (Fiscal Year 2021–2025 Consolidated Action Plan), Massachusetts
Education	
Court mandates	Jefferson County Public Schools, Kentucky
 Community and Organization Level: Programs at the local or school district level designed to achieve desegregation and integration initiatives in neighborhoods and public school systems.	
Housing	
Housing Choice Vouchers program	Baltimore Regional Housing Partnership, Maryland Dallas Housing Authority, Texas NestQuest Houston, Texas
Moving to Opportunity for Fair Housing Demonstration	Baltimore Regional Housing Partnership, Maryland
Project-based vouchers	Baltimore Regional Housing Partnership, Maryland Elm City Communities, Connecticut
Choice Neighborhoods program	Urban Strategies, Inc. (AIR) Urban Strategies, Inc. (The Century Foundation)

Types	Examples
Education	
Promise Neighborhoods program	Urban Strategies, Inc. (AIR) Urban Strategies, Inc. (The Century Foundation)
Detracking	Denver School of Science and Technology, Colorado High Tech High, California Shaker Heights Schools, Ohio
Pre-K programs	Hamden Public Schools, Connecticut
School boundaries and student assignment	Charlotte-Mecklenberg School District, North Carolina Community School District 13, New York Howard County Public Schools, Maryland Roaring Fork School District, Colorado
School mergers or school pairings	Joint Profile: New York City and Charlotte, North Carolina
Open enrollment and controlled choice or equitable choice	Jefferson County Public Schools, Kentucky Seattle Public Schools, Washington
Diverse-by-design schools	Larchmont Charter School, California
Magnet schools, charter schools, and attractive school models	Dallas Independent School District, Texas Denver School of Science and Technology, Colorado Larchmont Charter School, California
School climate	National School Climate Center Roaring Fork School District, Colorado
Recruitment of diverse staff	Denver School of Science and Technology, Colorado Roaring Fork School District, Colorado
Staff training and professional development	Roaring Fork School District, Colorado The Century Foundation Toolkit on Fostering Intergroup Contact in Diverse Schools
Equity audits	Equity Audits in School Districts: An explainer

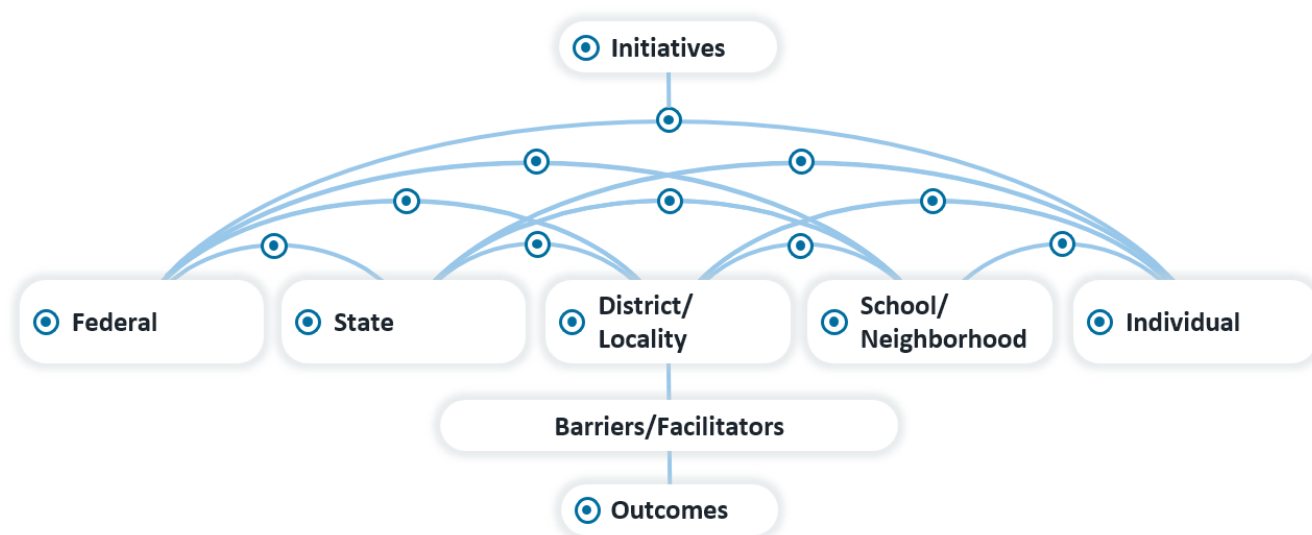
Types	Examples
 Interpersonal and Individual Level: Services and supports delivered to ensure individuals have access to relevant programs for housing and education needs.	
Housing	
Case management and wraparound services (as part of housing mobility programs)	Baltimore Regional Housing Partnership, Maryland Elm City Communities, Connecticut NestQuest Houston, Texas
Advocacy and community engagement to address “Not In My Backyard” challenges	Inclusive Communities Project, Texas
Education	
Culturally relevant curriculum	Larchmont Charter School, California High Tech High, California
Project-based learning	High Tech High, California Larchmont Charter School, California The Century Foundation Toolkit on Fostering Intergroup Contact in Diverse Schools
Wraparound services for students and families	Roaring Fork School District, Colorado

Section 2. Mapping Connections and Pathways of Change—A Guide to Facilitate Strategic Planning for Implementing Desegregation and Integration Efforts

Mapping Out a Pathway of Change for Your Desegregation and Integration Initiative

This guide is designed to support your strategic planning conversations and discussions. As an organizational leader and practitioner, you may have to develop or reassess periodically your strategic implementation plan to ensure your organization’s desegregation and integration initiatives are effective. As opposed to a narrow, initiative-focused view, taking a **dynamic systems-oriented approach (Exhibit 3)** in strategic planning can improve the efficiency and effectiveness of an initiative, leverage collaborations, and minimize unintended consequences.

Exhibit 3. A dynamic systems-oriented theory of change for desegregation and integration



Every strategic implementation plan for a desegregation and integration initiative represents a unique **pathway of change** that holistically accounts for the interconnected policy–community–individual dynamics that maintain segregated communities and schools in the United States.

Strategic plans for the same type of desegregation initiative are rarely identical. Every desegregation and integration initiative operates in its own context and requires a unique pathway of change or strategic implementation plan that responds and adapts to a unique set of systemic barriers and facilitators that change over time. The following pages offer a four-step facilitated process to help you and your team envision and plan your initiative’s unique pathway of change that is responsive to these systemic factors.

A Dynamic Systems Orientation of Desegregation and Integration Initiatives

Planning for desegregation and integration initiatives can benefit from an adaptive and interactive approach that considers the multitude of factors influencing *where*, *when*, and *how* an initiative is implemented. Developed by AIR, the [interactive Theory of Change](#) (Exhibit 3) is an online tool to help users identify and assess the ecosystem of factors within which desegregation and integration initiatives operate (American Institutes for Research, n.d.).

As depicted in the [online tool](#), your organization’s initiative may be influenced by systemic factors at the *level* at which the initiative originates or is implemented (e.g., federal, state, district/locality, school/neighborhood, individual). Furthermore, different factors at each level, and interactions between them, can pose another layer of systemic influence on the initiative. These interactions can create barriers to or be facilitators of the initiative’s success. These factors and the extent to which they facilitate or pose challenges to the initiative can change over time. It is important to assess these factors periodically as part of your strategic planning process. Using this guide will help your team prepare to **identify** these systemic factors, **assess** their influences on your initiative, and **prioritize** actions that will inform your strategic plan.

PATHWAYS OF CHANGE FACILITATION GUIDE



What is a pathway of change?

A pathway of change is a strategic implementation approach or plan—in this case, for a desegregation and integration initiative. It takes into account various interconnected factors—like historical context, policies, institutions, politics, actors, and resources—that systematically affect segregation in the United States. Each desegregation and integration initiative can have a unique pathway of change based on the influences and interactions of these various factors.

What does this facilitation guide do?

This guide outlines a four-step, systems-oriented approach designed to help practitioners examine and map the multilevel, interconnected factors that might affect the implementation and effectiveness of their desegregation and integration initiatives. By mapping these factors, practitioners will be better positioned to leverage facilitators and address barriers in developing their initiative’s implementation approach or pathway of change.

How will this guide help you?

The interconnected and multilevel nature of systemic drivers of segregation can sometimes hide important factors that influence the success of desegregation and integration efforts. This guide breaks down the process of identifying these factors. Through reflection and discussion, this guide will help team leaders and staff identify the systemic factors, assess associated opportunities and hurdles, and prioritize action steps to inform strategic planning decisions. At the end of this guided process, team members and staff will be better positioned to craft strategies and decisions that are aligned with systemic factors to increase the effectiveness of their desegregation and integration efforts and avoid unintended consequences.

Who can use this guide?

This guide is designed for practitioners who work on desegregation and integration initiatives in the education and housing sectors. Whether you are planning a new initiative or reassessing the strategy of an existing one, this guide can help you to situate your initiative within an ecosystem of interconnected factors and to prioritize strategies and action steps for effective implementation.

What are the steps?

This four-step guided process facilitates team inquiry and discussion through the following steps:

- Step 1: Identify systemic facilitators and barriers at the level at which the initiative is being implemented
- Step 2: Identify how systemic factors interact between levels
- Step 3: Assess and prioritize action steps
- Step 4: Inform strategic planning

Directions

Consider using this guide when strategically planning or reassessing how your organization will design and implement a desegregation and integration initiative. [Appendix B](#) includes all the worksheets from each step.

- Schedule a planning meeting with staff who represent multiple facets of the work. Consider including students, families, and other community members or close partners with lived experiences of segregated systems.
- Use this facilitation guide to go through each of the four steps.
- Reflect on the discussion prompts individually and as a team.
- Note your responses in the spaces provided.

This guide is designed to help you and your team develop a deeper understanding of the systemic factors that shape your initiative. This understanding will inform how your team develops or modifies your initiative's strategic implementation plan.

You may revisit this facilitation guide periodically as part of continuous improvement to reflect on whether any of the systemic factors influencing your initiative has changed. Although the guide is designed to be completed in sequence, not all sections of the guide may be equally relevant or necessary for every team. Depending on the level of readiness in your organization and specifics of your initiative, you can either follow the guide sequentially or choose the most pertinent sections.

A sequential approach may work best when your initiative is relatively new or when you are attempting to revamp or modify how you are implementing an existing initiative. If your organization is more experienced, or if your team is already aware of the strengths or specific requirements of the initiative, then you may choose to be more selective of the steps on which you would like to focus. Use this checklist to determine what you would like to do first and track your progress as you go through the guide.

Steps to determine the systemic influences and associated strategies that will inform the pathway of change for your initiative	Checkmark
1. Step 1: Identify systemic barriers and facilitators at the level at which the initiative is being implemented	
a. Step 1A: Identify the level at which the initiative is being implemented	
b. Step 1B: Identify systemic factors at this level that are facilitators and/or barriers	
i. Identify <i>context-related</i> facilitators and barriers	
ii. Identify <i>policy-related</i> facilitators and barriers	
iii. Identify <i>institution-related</i> facilitators and barriers	
c. Step 1C: Identify levers of change	
2. Step 2: Identify how systemic factors interact between levels	
a. Step 2A: Identify other levels that may influence your initiative	
b. Step 2B: Identify systemic factors at different levels of influence that interact to facilitate or create barriers for your initiative	
i. Identify how <i>policy- and political-related factors</i> at different levels interact to facilitate or create barriers for your initiative	
ii. Identify how <i>individual and organizational actors</i> at different levels interact to facilitate or create barriers for your initiative	
iii. Identify how <i>resource allocations</i> at different levels interact to facilitate or create barriers for your initiative	
c. Step 2C: Identify levers of change or actions you may take based on Steps 2A and 2B.	
3. Step 3: Assess and prioritize action steps	
a. Step 3A: Assess the levers of change you noted in Step 1C to prioritize actions	
b. Step 3B: Assess the levers of change you noted in Step 2C to prioritize actions	
4. Step 4: Inform strategic planning	

Step 1: Identify Systemic Barriers and Facilitators at the Level at Which the Initiative Is Being Implemented

The first step in mapping out your initiative’s implementation approach or pathway of change is to locate your initiative at the appropriate systemic level. A desegregation and integration initiative may be designed and/or implemented at different levels or across levels—at the **policy level** (federal, state), **organizational or community level** (district/local, school/neighborhood), or **individual/interpersonal level**. For example, housing tax credit programs are typically implemented at the federal or state levels, and housing mobility programs that feature case management and wraparound services for individuals are commonly implemented at the interpersonal or individual level. In the box below, identify the primary level at which your initiative would operate.

Step 1A: Identify the level at which the initiative is being implemented

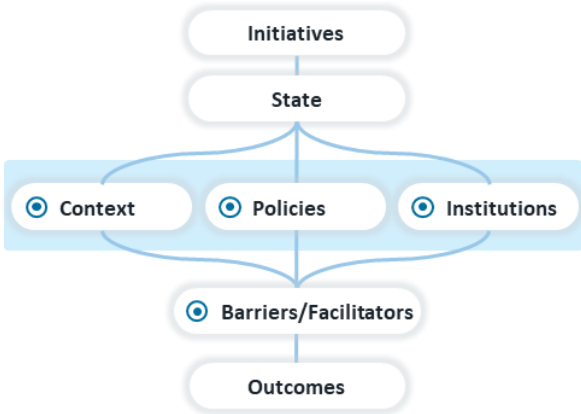
 What is your desegregation and integration initiative?

Guiding question	Response
Q1. At what level does implementation of your initiative primarily take place? <i>Select all that apply: policy level (federal, state), organizational or community level (district/local, school/neighborhood), or individual/interpersonal level.</i>	☐ Policy level (federal/state) ☐ Organizational or community level (district/local, school/neighborhood) ☐ Individual/interpersonal level

At each level, such systemic factors as **context**, **policies**, and **institutions** (**Exhibit 4**) shape how effective initiatives can be and how well they are implemented. These factors may be (a) facilitators that can be leveraged to improve your initiative or (b) barriers that must be overcome.

The exercise below is designed to help you identify **barriers and facilitators** that may influence your initiative’s effectiveness and/or implementation. The exercise will prompt you to identify potential **levers of change or actions** that may be key to your initiative’s success.

Exhibit 4. Influence of State Context, Policies, and Institutions



Step 1B: Identify systemic factors at this level that are facilitators and/or barriers. Work through the guiding questions and discussion prompts below with your team to identify facilitators and barriers related to context, policies, and institutions.



Place your initiative in the specific historical, political, and socioeconomic **contexts** in which it operates to help identify context-related facilitators and barriers that influence the implementation and effectiveness of your initiative.

CONTEXT	
Guiding questions	Responses
IDENTIFY CONTEXT-RELATED FACILITATORS Q1. At the level you identified above, what context-related factors have facilitated the implementation and effectiveness of desegregation and integration initiatives? <i>Examples of historical context-related factors might include social movements that have expanded access to civil rights. Examples of current context-related facilitators might include the level of civic engagement and activism in a specific community. Look at the interactive Theory of Change for more examples.</i>	
IDENTIFY CONTEXT-RELATED BARRIERS Q2. At the level you identified above, what context-related factors have posed barriers to the implementation and effectiveness of desegregation and integration initiatives? <i>Examples of historical context-related factors might include legacies of systemic racism. Examples of current context-related barriers might include the existing spatial, geographic, and/or infrastructural patterns of physical segregation.</i>	



Now that you have thought through how context influences your initiative, next think about the systemic influence of **policies**. At each level of implementation, there are different legislation and policies that may affect the initiative's scale, scope, and how it is implemented.

POLICY	
Guiding questions	Responses
IDENTIFY POLICY-RELATED FACILITATORS Q3. What current policies make it easier to implement your initiative? What policies help your initiative to be more effective? Q4. What policies or policy components might support the sustainability of your initiative? <i>For example, school boundary and redistricting policies can facilitate the implementation of desegregation and integration initiatives.</i>	
IDENTIFY POLICY-RELATED BARRIERS Q5. What policies or policy components make it challenging to implement your initiative? What policies limit the effectiveness of your initiative? Q6. What policies might limit the sustainability of your initiative? <i>For example, restrictive local zoning policies can inhibit the development, affordability, and utilization of housing, which affects the extent to which desegregation initiatives can address root causes of segregation.</i>	



Finally, think about the systemic influence of **institutions**. Formal and informal institutions or organizations may constitute a set of incentives, constraints, or norms at each level. Some institutions can support implementation of your initiative, and others may constrain your initiative.

INSTITUTION	
Guiding questions	Responses
IDENTIFY INSTITUTION-RELATED FACILITATORS Q7. Which institutions support the implementation of your initiative? Which institutions enhance the effectiveness of your initiative? Q8. Which institutions might support the sustainability of your initiative? <i>Examples include the support of local institutions, such as planning commissions and licensing boards with the authority to enact regulations, such as zoning ordinances and building permits.</i>	

INSTITUTION	
Guiding questions	Responses
IDENTIFY INSTITUTION-RELATED BARRIERS Q9. Which institutions make it challenging to implement your initiative? Which institutions limit the effectiveness of your initiative? Q10. Which institution-related barriers limit the sustainability of your initiative? <i>Examples include opposition from homeowner’s associations or housing authorities.</i>	

Step 1C: Identify levers of change. Consider the level(s) at which your organization is working to implement the initiative. Work through the guiding questions and discussion prompts below with your team to identify levers of change that address systemic factors of context, policies, and institutions.



Now that you have identified systemic facilitators and barriers at your initiative's primary level of implementation, the next step is to reflect on strategic **levers of change**. Levers of change are the context-related factors, policies, and institutions that can be harnessed to strengthen your initiative or effectively address implementation barriers. Identifying levers of change is a vital step in charting an effective and strategic course of action.

Guiding questions	Responses
IDENTIFY CONTEXT-BASED LEVERS OF CHANGE Q1. How can context-related facilitators be leveraged or harnessed to support your initiative? Q2. Are there context-related barriers that are within your initiative's capacity to address? If yes, how? <i>Examples of context-related changes might include actions that increase community awareness of the benefits of school integration. Look at the interactive Theory of Change for more examples.</i>	
IDENTIFY POLICY LEVERS OF CHANGE Q3. How can policies be leveraged or harnessed to support your initiative? Q4. Are there policies that are within your initiative's capacity to address? If yes, how? <i>Examples might include advocacy or lobbying campaigns that aim to reform housing or educational access policies. Look at the interactive Theory of Change for more examples.</i>	
IDENTIFY INSTITUTION-RELATED LEVERS OF CHANGE Q5. How can institution-related facilitators be leveraged or harnessed to support your initiative? Q6. Are there institution-related barriers that are within your initiative's capacity to address? If yes, how? <i>For example, changes to the composition of a school board's practices and regulations can affect transportation policies or school site locations, laying the groundwork for desegregation and integration initiatives to move forward.</i>	

Step 2: Identify How Systemic Factors Interact Between Levels

Although your initiative may be implemented primarily at the level you identified earlier, other levels may influence how your initiative is implemented. For example, the Housing Choice Vouchers program is a *federal* program that is implemented at the *local and neighborhood* levels. Any changes made by the U.S. Department of Housing and Urban Development, which funds and administers this program, would substantially shift local implementation of the program—affecting anything from eligibility criteria to subsidy amounts to program requirements. In the exercise below, identify what other levels may influence your initiative.

Step 2A: Identify other levels that influence your initiative

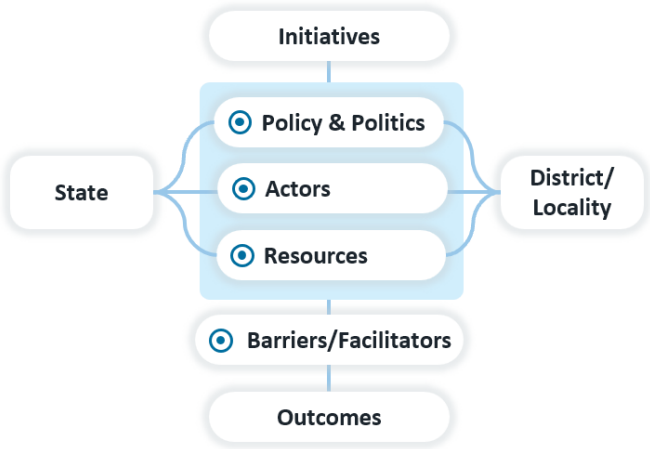


Write out the type of desegregation and integration initiative you are planning.

Guiding question	Responses
Q1. In addition to the primary level of implementation you identified earlier, what other level(s) might have an important influence on your initiative? <i>Select all that apply: federal, state, district/local, school/neighborhood, or individual.</i>	☐ Policy level (federal/state) ☐ Organizational or community level (district/local, school/neighborhood) ☐ Individual/interpersonal level

Next, reflect on how different systemic factors at other levels interact with factors at your primary level of implementation and vice versa. To what extent are the **policies and politics** between levels aligned? How do different **individual and organizational actors** between levels interact with one another? How are **resources** allocated at different levels? For example, a policy at a state level may not align with a policy at the federal level. Consider how organizations at the state level that oversee public school districts interact with organizations at the local level, such as school boards. **Exhibit 5** depicts systemic factors interacting at the state and district/local levels. In addition to interacting with each other, systemic factors at different levels may interact with your initiative. These interactions might facilitate your initiative, or they may create barriers that your initiative might have to overcome. Consider the extent to which **policies and politics, actors, and resources** align with your initiative.

Exhibit 5. Example of Interactions Between State and District/Locality Levels of Implementation



Note: This exhibit is an example from the interactive Theory of Change. Your focus may be at a different level. To learn more, visit the [interactive Theory of Change](#).

Step 2B: Identify systemic factors at different levels of influence that interact to facilitate or create barriers for your initiative. Consider the different levels of influence you identified above. Work through the guiding questions with your team to identify the systemic influences you may leverage to improve implementation and/or effectiveness.



The exercise below is designed to help you think through each of these interactions to identify potential alignments or synergies your initiative could leverage to facilitate implementation and/or improve effectiveness. Federal, state, local, and school policies and politics play a critical role in determining whether initiatives are ultimately effective. Moreover, the politics of desegregation and integration are constantly shifting, depending on the context and the balance of power between levels.

POLICY AND POLITICAL	
Guiding questions	Responses
IDENTIFY POLICY- AND POLITICAL-RELATED INFLUENCES AT EACH LEVEL Q1. What are the most relevant policies operating at each level of influence that you identified? Q2. Of the policies you identified at each level, which seem to be aligned with your initiative? Q3. At each level of influence, what is the relevant political context that might affect your initiative? Q4. What political movements or groups seem to be aligned with your initiative? Now, repeat these questions for each level you identified.	
IDENTIFY POLICY AND POLITICAL FACILITATORS BETWEEN LEVELS Q5. How do interactions between policies and political factors at different levels help your initiative? Q6. What advantages do these alignments offer your initiative? <i>For example, initiatives that promote integration through the expansion of affordable housing may be bolstered by the alignment of housing policies across district, local, and state levels. Moreover, elections can occasionally realign political coalitions and agendas to open up avenues for action that may have previously been closed.</i>	

POLICY AND POLITICAL	
Guiding questions	Responses
IDENTIFY POLICY AND POLITICAL BARRIERS BETWEEN LEVELS Q7. Who might be politically opposed to your initiative? Q8. What policy and/or political misalignments <i>between</i> levels might be barriers for your initiative? Q9. What redundancies, gaps, or inefficiencies do misaligned policies and politics at different levels create for your initiative? <i>Different levels have their own policy and political realities. These factors may be at odds from time to time, which may inhibit your initiative's implementation and effectiveness. For example, each level may have different reporting or compliance requirements that might be difficult for your initiative to navigate. Moreover, despite enthusiasm to support your initiative at the district/local level, a lack of political will—or even opposition—at the state level might act as a barrier.</i>	



Now, complete a similar exercise to map out how interactions between **individual and organizational actors at different levels** may influence your initiative. Such actors shape the policies, practices, and institutions that operate between levels

INDIVIDUAL AND ORGANIZATIONAL ACTORS	
Guiding questions	Responses
IDENTIFY KEY INDIVIDUAL AND ORGANIZATIONAL ACTORS Q10. What are the most relevant individual and organizational actors who might have an influence on the implementation and effectiveness of your initiative? Q11. Who are the key decision-makers that operate at each level you identified? <i>Now, repeat these questions for each level you identified.</i>	

INDIVIDUAL AND ORGANIZATIONAL ACTORS	
Guiding questions	Responses
IDENTIFY INDIVIDUAL AND ORGANIZATIONAL FACILITATORS BETWEEN LEVELS Q12. Of the actors you identified at each level, who seems to operate in ways that align with the needs of your initiative? Q13. What individual and organizational actors across different levels might serve as key allies to your initiative? <i>For example, state governors, legislators, housing and education officials, and other actors collaborate with actors at the district and local levels—such as mayors, city council members, and school board members—to shape residential and educational policies and programs.</i>	
IDENTIFY INDIVIDUAL AND ORGANIZATIONAL BARRIERS BETWEEN LEVELS Q14. Of the actors you identified at each level, who may have agendas that are at odds with the goals of your initiative? Are there actors who might be working against the interests of your initiative? <i>For example, local homeowners’ groups and zoning boards may oppose desegregation and integration initiatives, such as affordable housing programs, and actively work against them.</i>	



Finally, map out how **resource allocations** across different levels may influence your initiative. Key financial and in-kind resources flow between levels, but levels of support may fluctuate over time depending on the shifting economic, political, and social contexts

RESOURCE ALLOCATIONS	
Guiding questions	Responses
IDENTIFY AVAILABLE RESOURCES Q15. How are resource allocation decisions made, and what factors at each level shape such decisions? Q16. How do resources flow between levels, and what mechanisms mediate this flow? <i>Now, repeat these questions for each level you identified.</i> <i>For example, housing assistance from federal funding can flow through local housing authorities to subsidize rent for low-income households.</i>	
IDENTIFY RESOURCE-RELATED FACILITATORS Q17. Across the different levels you identified, what kind of funding and financial resources might be available to support your initiative? Q18. What other resources—such as technical assistance, training, or human capital—might be available to support your initiative?	
IDENTIFY RESOURCE-RELATED BARRIERS Q19. What are the biggest resource needs of your initiative? Q20. What are the barriers to attaining and sustaining these resource needs? Q21. What redundancies, gaps, or inefficiencies in the existing resource landscape might adversely affect your initiative?	

STEP 2C: Identify levers of change or actions you may take based on Steps 2A and 2B. Work through the guiding questions and discussion prompts below with your team to identify how you can leverage or address the influence of interactions between the policies and politics, actors, and resource allocations at different levels.



Now that you have identified how policy- and political-related factors, individual and organizational actors, and resource allocations at different levels interact to facilitate or create barriers for your initiative, the next step is to reflect on **levers of change**. Levers of change are any of the above factors that can be harnessed to strengthen your initiative or effectively address implementation barriers. Just like you did in Step 1C, identifying levers of change is a vital step in charting an effective and strategic course of action.

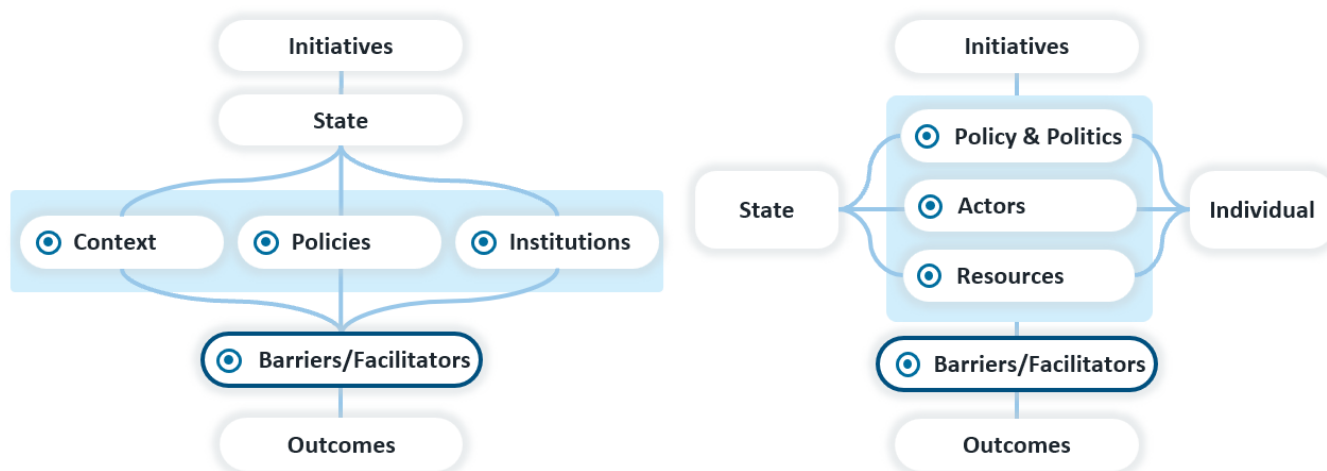
Guiding questions	Responses
IDENTIFY WAYS TO LEVERAGE SYNERGIES AND POLICY AND POLITICAL ALIGNMENTS Q1. What policy or political alignments can your initiative leverage to improve implementation and/or effectiveness? Q2. In which areas could policy alignments or political coalitions be forged to support your initiative? Q3. What policy or procedural inefficiencies or gaps could be addressed through your initiative or through coordinated action with other institutions or actors and resources? <i>Policy and/or political alignments may be achieved through collective action. Strategic partnerships and advocacy efforts can lead to policy and/or political changes that might generate efficiencies or address key gaps in policy.</i>	
IDENTIFY WAYS TO LEVERAGE ALLIANCES AND PARTNERSHIPS WITH KEY ACTORS Q4. What existing alliances or partnerships can your initiative leverage to improve implementation and/or effectiveness? Q5. What <i>new</i> alliances or partnerships can your initiative forge to improve implementation and/or effectiveness?	

Guiding questions	Responses
IDENTIFY WAYS TO LEVERAGE AVAILABLE RESOURCES Q6. Across the different levels you identified, how can you access the funding and financial resources that might support your initiative? Q7. What partnerships could you explore that might unlock other resources, such as technical assistance, training, or human capital? Q8. What investments could your initiative make that might address some of its biggest needs? Q9. What resources does your initiative need to ensure longer term sustainability? Q10. How might you tap multiple funding streams across levels (i.e., braid funding) to achieve sustainability or accomplish something that is difficult to achieve through a single funding stream?	

Step 3: Assess and Prioritize Action Steps

By going through the exercises in Steps 1 and 2, you have identified key factors at and across different levels of implementation that might facilitate or pose barriers for your initiative (**Exhibit 6**).

Exhibit 6. Systemic Factors That Influence an Initiative



In Step 3, you will build on this systemic view of barriers and facilitators to prioritize actions that will inform your strategic planning process. Look through your responses to Step 1C and Step 2C. You should have generated some ideas on how to leverage facilitators and address barriers. The two-stage exercise below will help you **assess** your responses in Steps 1 and Step 2 and then **prioritize** specific actions that your team can apply in implementing your initiative. If you are not sure what types of strategic actions can help you realize your priorities, then you can consult the resources below to learn about different approaches and practices that other organizations in housing and education have used.

EXAMPLES OF APPROACHES AND STRATEGIES ADOPTED BY DIFFERENT ORGANIZATIONS TO IMPLEMENT THEIR DESEGREGATION AND INTEGRATION INITIATIVES

You may choose to adopt or tailor some of these strategies to your own unique context.

- [Indicators report](#) (AIR)
- [Bridges Collaborative member profiles](#) (AIR)
- [Aligning housing and education evidence: Promising practices and structural challenges](#) (Urban Institute)
- [Integrating housing and education solutions to reduce segregation](#) (The Urban Institute)
- [Spotlights on Bridges Collaborative members](#) (The Century Foundation)
- [A new wave of school integration](#) (The Century Foundation)
- [Toolkits to help educators diversify schools and integrate classrooms](#) (The Century Foundation)

Step 3A: Assess the levers of change you noted in Step 1C to prioritize actions

Assessment	Responses
Q1. Among the context-, policy-, and institution-related facilitators you identified in Step 1C, which do you consider to be the most <i>feasible</i> for your initiative to leverage? Q2. Among the context-, policy-, and institution-related barriers you identified in Step 1C, which do you consider to be the most <i>feasible</i> for your initiative to address? Q3. What context-specific factors, policies, or institutions could realistically be changed in the <i>short-to-medium</i> term to facilitate implementation of your initiative? Consider your organization’s capacity to make these changes.	
Prioritization	Responses
Q4. Among the actions you identified above, which are the most likely to lead to meaningful change? Q5. Among the actions that you consider within your scope, which two or three actions would you prioritize to improve the implementation and/or effectiveness of your initiative?	

In continuing this exercise, you will assess and prioritize action steps based on Step 2C.

Step 3B: Assess the levers of change you noted in Step 2C to prioritize actions

Assessment	Responses
Q1. Among the policy synergies, partnerships, and resources you identified in Step 2C, which do you consider to be the most <i>feasible</i> for your initiative to leverage? Q2. Among the policy, partnership, and resource gaps and/or inefficiencies you identified, which do you consider to be the most <i>feasible</i> for your initiative to address?	

Prioritization	Responses
Q3. Among the actions you identified above, which are most likely to lead to meaningful change? Q4. Among the actions that you consider to be within your scope, which two or three actions would you prioritize to improve the implementation and/or effectiveness of your initiative?	

Step 4: Inform Strategic Planning

Now that you have identified priority actions, use the worksheet on the next page to work them into your strategic implementation plan. The set of strategies you identify will comprise the building blocks of your initiative's pathway of change. Because systemic factors change over time, this set of strategies may need to be adjusted to remain aligned with needs.

RESOURCES FOR STRATEGIC PLANNING

- You may refer to [examples of strategies](#) that other organizations have used. Remember, there can be many nuances when implementing desegregation and integration initiatives—something that worked well for one organization at a certain point in time may not work for you. Understanding the systemic factors can help you think about those nuances and avoid unintended consequences.
- Regardless of the strategies you use, investing in [certain indicators](#) of success, such as organization-wide changes to improve communication and engagement strategies, and building cross-sector partnerships can support the effectiveness and sustainability of desegregation efforts.

Instructions: Use this action plan template to outline the strategies/activities, responsibilities, resources, and timeline that your team will follow to take action on the three priorities you identified during Step 3. Complete a separate action plan for each strategic priority. While this is a possible tool for action planning, we encourage you to integrate these action steps into existing action planning processes that your organization may have for other aspects of your initiative’s design.

Strategic Priority 1 (Action Step)

Strategy/activity detail	Staff responsible	Resources needed	Start date	End date

Strategic Priority 2 (Action Step)

Strategy/activity detail	Staff responsible	Resources needed	Start date	End date

Strategic Priority 3 (Action Step)

Strategy/activity detail	Staff responsible	Resources needed	Start date	End date

Conclusions

Every strategic implementation plan for a desegregation and integration initiative offers a unique **pathway of change** that holistically accounts for the interconnected policy, community, and individual dynamics that maintain segregated communities and schools in the United States.

This Pathways of Change resource is designed to support field leaders as they gauge the full complexity of segregation to determine and plan interventions that are collaborative, multilevel, and cross-sector.

When applied together, the visual landscape, glossary of initiatives, and facilitation guide can help practitioners to understand the range of initiatives for desegregation and integration, gauge their own initiatives in relation to other opportunities for change, and determine the systemic factors that influence an initiative to craft their own strategic plan and specific pathway of change.

Using this resource, practitioners can identify opportunities to advance strategic planning, development, and evaluation activities and to support collaboration and complementary actions among partners in the housing and education sectors.

Appendix A: Descriptions of Initiatives

This appendix describes each initiative mentioned in the **visual landscape** in greater detail and provides examples for reference. The organization of desegregation and integration initiatives is based on the level at which each is being implemented: public policy, community and organization, and interpersonal and individual.

Policy level. Policy or legislative approaches that are enacted at the federal, state, or local levels and affect large populations through regulations, increased access, or economic incentives.



Housing-Related Desegregation and Integration Initiatives at the Policy Level

- **Zoning**
 - Zoning ordinances or land-use regulations legislate how land can be used (e.g., residential, commercial, agriculture). Exclusionary zoning excludes the types of homes that can be built in a neighborhood. Overall, zoning ordinances are a key tool for local governments to manage land use in a way that balances growth, community needs, and environmental concerns.
 - Historically, exclusionary zoning policies were established as an active mechanism to codify Black–white segregation. Today, zoning and neighborhood segregation are still intertwined.
 - Zoning policies have been used to reduce segregation by (a) establishing affordable housing overlay zones, wherein developers build affordable housing in zones designated for other purposes; (b) enacting inclusionary zoning, through which mandates or incentives are used to ensure that 10–25% of any designated zone is designated for affordable housing; and (c) eliminating single-family zoning in an effort to encourage the development of mixed-income communities because multifamily housing units provide the most affordable housing.
 - **Example:** [Elm City Communities](#)



POLICY LEVEL

Housing

- Zoning
- Fair Housing Act of 1968
- Affirmatively Furthering Fair Housing
- Low-income housing tax credit program
- Community Development Block Grants

Education

- Court mandates

- **Fair Housing Act of 1968**

- The Fair Housing Act is Title VIII of the Civil Rights Act of 1968. It protects people from discrimination when they are renting or buying a home, getting a mortgage, seeking housing assistance, or engaging in other housing-related activities. Additional protections apply to federally assisted housing (U.S. Department of Housing and Urban Development, n.d.d).
- The U.S. Department of Housing and Urban Development (HUD) enforces the Fair Housing Act. The act prohibits housing discrimination on the basis of race, color, national origin, religion, gender, familial status, and disability. Under this act, housing providers cannot deny housing or impose special requirements on families with children. Advertising to limit housing to certain groups is also prohibited. Developers and builders can be held liable under the Fair Housing Act if buildings do not meet certain design requirements to support accessibility for people with disabilities (U.S. Department of Justice, Civil Rights Division, 2023). Some types of housing are exempt from the Fair Housing Act: owner-occupied housing with four or fewer units, private members-only clubs, housing operated by religious organizations, and single-family homes that are sold or rented without the use of a broker.
- **Examples:** [Inclusive Communities Project](#) and [NestQuest Houston](#)

- **Affirmatively Furthering Fair Housing**

- The Fair Housing Act requires HUD and recipients of federal funds from HUD to affirmatively further the policies and purposes of the Fair Housing Act, also known as “affirmatively furthering fair housing” (AFFH). The obligation to AFFH requires recipients of HUD funds to take meaningful actions and combat discrimination to overcome patterns of segregation and foster inclusive communities that are free from barriers that restrict access to opportunities based on protected characteristics (HUD, n.d.b).
- HUD implements the AFFH mandate in several ways, such as by collecting certification from program participants, providing guidance on program design in its notices of funding opportunities, requiring affirmative fair housing marketing and advertising, and enforcing site and neighborhood standards. HUD’s 2021 interim final rule, [Restoring Affirmatively Furthering Fair Housing Definitions and Certifications](#), requires program participants to submit certifications that they will affirmatively further fair housing in connection with their consolidated plans, annual action plans, and public housing agency/authority plans. To support these certifications, the interim final rule creates a voluntary fair housing planning process for which HUD provides technical assistance and support (HUD, n.d.a).
- **Example:** [Elm City Communities](#)

- **Low-Income Housing Tax Credit program**

- The Tax Reform Act of 1986 created the Low-Income Housing Tax Credit (LIHTC) program, which is the only major funding source for producing and preserving affordable rental housing. The LIHTC program gives states and local LIHTC-allocating agencies (e.g., housing authorities, finance associations and agencies) approximately \$10 billion in annual budget authority to issue

tax credits for the acquisition, rehabilitation, or new construction of rental housing for lower-income households (HUD User, Office of Policy Development and Research, n.d.a). Federal regulations incentivize development in high-poverty areas, which may deepen residential segregation on the basis of race.

- The LIHTC program requires landlords or developers who access the tax credit to provide affordable rent (no more than 30% of household income for rent and utilities) for at least 30 years, but units are not required to be permanently affordable (Scally et al., 2018). Even with these requirements, many people from low-income households need federal rental assistance to afford rent in new developments (Scally et al., 2018). Some housing authorities have been able to positively leverage the LIHTC program to support residents from low-income households.
- **Example:** [Baltimore Regional Housing Partnership](#)

- **Community Development Block Grants**

- Title 1 of the Housing and Community Development Act of 1974 authorized the Community Development Block Grants (CDBG) program, which is designed to strengthen community development by addressing such needs as infrastructure, economic development projects, public facilities installation, community centers, and housing rehabilitation (HUD, 2024). The CDBG program provides annual grants to states, cities, and counties so they can develop viable urban communities that (a) offer decent housing and suitable living environments and (b) expand economic opportunities primarily for low- and moderate-income households.
- CDBG’s flexibility allows communities to design and implement strategies that are tailored to their own needs and priorities. On January 10, 2024, HUD published a proposed rule to enable it to revise and update the requirements governing CDBG (HUD, 2024).
- **Example:** [City of Cambridge \(MA\) \(Fiscal Year 2021–2025 Consolidated Action Plan\)](#)



Education-Focused Desegregation and Integration Initiatives at the Policy Level

- **Court Mandates**

- In response to resistance to school desegregation following the verdict in *Brown v Board of Education* (1954) and the passage of the Civil Rights Act (1964), court orders from litigation against school districts from the 1960s to the 1980s required school districts to desegregate and take actions toward reducing racial inequality in access to education. Following court orders, school districts developed and adopted different approaches to desegregation plans, including rezoning school boundaries to shift student demographics, creating magnet schools to expand school choice, and implementing policies related to student transfers and busing.
- Court-mandated desegregation plans cannot cross school district lines and do not address segregation between school districts, particularly between cities and suburbs. Supreme court rulings in the 1990s (Orfield 1996) made it easier for school districts to be released from court-ordered desegregation.

- For schools not operating under Brown-era court orders, the Parents Involved in Community Schools v. Seattle Public Schools (2007) case prohibits using race in desegregation efforts. Such changes have contributed to subsequent increases in segregation (Chemerinsky, 2003).
- **Example:** [Jefferson County \(KY\) Public Schools](#)

Community and organization level: Programs at the local or school district level designed to achieve desegregation and integration in neighborhoods and public school systems.



Housing-Related Desegregation and Integration Initiatives at the Community and Organization Level

- **Housing Choice Vouchers program**
 - The federal Housing Choice Vouchers program helps very-low-income families, the elderly, and people with disabilities afford decent, safe, and sanitary housing in the private market. Participants can use vouchers to rent housing, including single-family homes, townhouses, and apartments. A housing subsidy is paid to the landlord directly by the public housing agency on behalf of the participating family. The family then pays the difference between the actual rent charged by the landlord and the amount subsidized by the program (HUD, n.d.e).
 - Established through Section 8 of the 1974 Housing and Community Development Act (a reauthorization of the U.S. Housing Act of 1937), housing vouchers are provided to low-income tenants to help support rental payments. Long waiting lists and few vouchers hamper the utilization of this program. With long terms and set numbers of vouchers, new families may not have access to vouchers. Just one in four voucher-eligible families receive federal assistance (Fischer et al. 2021).
 - **Examples:**, [Baltimore Regional Housing Partnership](#), [Dallas Housing Authority](#), and [NestQuest Houston](#)



COMMUNITY AND ORGANIZATIONAL LEVEL

Housing

- Housing Choice Vouchers program
- Moving to Opportunity for Fair Housing Demonstration
- Project-based vouchers
- Choice Neighborhoods program

Education

- Promise Neighborhoods program
- Detracking
- Pre-K programs
- School boundaries and student assignment
- School mergers or school pairings
- Open enrollment and controlled choice or equitable choice
- Diverse-by-design schools and weighted lotteries
- Magnet schools, charter schools, and attractive school models
- School climate
- Recruitment of diverse staff
- Staff training and professional development
- Equity audits

- **Moving to Opportunity for Fair Housing Demonstration**

- The Moving to Opportunity (MTO) for Fair Housing Demonstration, which was authorized under Section 152 of the Housing and Community Development Act of 1992, was a 10-year federal project designed to encourage recipients of Section 8 housing vouchers to move to higher-opportunity areas. Recipients who received vouchers through the MTO demonstration could use them to move to census tracts with poverty rates below 10%.
- The MTO demonstration tested whether offering housing vouchers to families living in public housing projects in lower-opportunity neighborhoods of large cities could improve their lives and the lives of their children by allowing them to move to higher-opportunity neighborhoods. It was the first random-assignment social science experiment designed to identify the causal effects of moving from lower-opportunity to higher-opportunity neighborhoods.
- The demonstration looked at the impacts of neighborhood on employment, income, educational achievement, and social well-being among low-income families. Although MTO did not improve outcomes across all measured indicators, it did expand access to neighborhoods where residents felt safer, experienced higher levels of neighborhood satisfaction, and thought housing conditions were better (HUD User, Office of Policy Development and Research, n.d.b).
- The demonstration also revealed that neighborhoods affect children’s long-term outcomes through childhood exposure effects: every year that children live in a higher-opportunity area is associated with a corresponding increase in their income as an adult (Chetty and Hendren, 2018). This highlights the potential for intergenerational mobility through place-based approaches to economic mobility.
- **Example:** [Baltimore Regional Housing Partnership](#)

- **Project-based vouchers**

- Project-based vouchers provide rental assistance in privately owned and managed buildings. To be eligible for a voucher, a family or individual must have a “low income,” meaning the income cannot exceed 80% of the local median. Traditional housing choice vouchers are tenant-based, but project-based vouchers are associated with specific housing units whose landlords contract with state or local public housing agencies to rent units to those who are eligible.
- For each participating housing development, at least 40% of the subsidized units that become available annually must go to families with “extremely low incomes” (up to the poverty line or 30% of the local median, whichever is higher). Most of the remaining units are restricted to families or individuals with incomes not above half of the local median.
- Uptake challenges related to project-based vouchers include limited availability of project-based vouchers compared to tenant-based vouchers, significant variation in the quality of housing, and limited integration and alignment of project-based vouchers with other housing assistance programs and local planning efforts.
- **Examples:** [Baltimore Regional Housing Partnership](#) and [Elm City Communities](#)

- **Choice Neighborhoods program**

- By leveraging public and private dollars, the Choice Neighborhoods program supports locally driven strategies to help communities transform neighborhoods by (a) revitalizing severely distressed public and/or HUD-assisted housing and (b) catalyzing critical improvements in the neighborhood, including revitalizing vacant properties and developing and improving housing, businesses, services and schools. Local leaders, residents, and partners—such as public housing authorities, cities, schools, law enforcement, business owners, nonprofit organizations, and private developers—come together to create and implement a comprehensive revitalization plan (HUD, n.d.c).
- The Choice Neighborhoods program replaced the Hope VI program, which was charged with proposing a national action plan to eradicate severely distressed public housing. The Choice Neighborhoods program made its first awards in 2011. Although evaluation outcomes have not yet been published, the initiative is designed to address some of the unintended consequences of the Hope VI grant program; for example, many residents in Hope VI neighborhoods were never moved back into their original housing area. The Choice Neighborhoods program emphasizes one-for-one replacement of subsidized housing units, the right for recipients to return to their original housing area, and the development of mixed-income housing.
- **Example:** [Urban Strategies, Inc.](#)



Education-Focused Desegregation and Integration Initiatives at the Community and Organization Level

- **Promise Neighborhoods program**

- Promise Neighborhoods is a place-based, U.S. Department of Education-funded program that seeks to turn poverty-concentrated neighborhoods into communities of opportunity. The program offers a set of strategies to address issues faced by the community.
- Lead organizations and partners work to ensure that over time all children in a Promise Neighborhood have access to a continuum or pipeline of solutions that supports them from cradle to career. By braiding federal and other resources, communities can create opportunities and achieve better results for all (Promise Neighborhoods, n.d.).
- Although Promise Neighborhoods are designed to center the school, community organizations often take the lead by bringing cross-sector partners to the table to facilitate program implementation. Further, braided funding streams can be challenging to implement given competing agency-specific requirements and procedures.
- **Examples:** [Urban Strategies, Inc. \(AIR\)](#)

- **Detracking**

- Academic tracking places students with the same abilities or achievements in the same classroom. Students from higher-income backgrounds are more likely than students from lower-income backgrounds to be placed into higher academic tracks (Darling-Hammond, 2001). Detracking, on the other hand, places students of mixed abilities or achievements in the same classroom with differentiated instruction (Potter, 2019a).
- Although advanced programs (e.g., honors programs and Advance Placement [AP] courses) allow students to pursue more advanced classes, students' eligibility for and enrollment in such programs often depend on prior academic performance, teacher recommendations, or standardized test scores, which can disadvantage students who may not have had the same opportunities or support. The selective nature of these programs can exacerbate educational inequities, as students from lower-income backgrounds or less well-resourced schools may be underrepresented in honors and AP classes. This can lead to a lack of diversity within these advanced programs and inequitable opportunities for students.
- Approaches to detracking include eliminating tracking (e.g., removing honors courses and/or gifted and talented programs) expanding access to advanced coursework (e.g., universal 7th or 8th grade algebra, universal International Baccalaureate programs), and placing students from all tracks in the same classroom while providing differentiated instruction to ensure that students can learn at their level while benefiting from peer engagement (Pinto, 2023; Randazzo, 2023).
- **Examples:** [Denver School of Science and Technology](#), [High Tech High \(CA\)](#), and [Shaker Heights Schools \(OH\)](#)

- **Pre-K programs**

- High-quality pre-kindergarten (pre-K) programs can help close achievement gaps that often correlate with racial and socioeconomic disparities. Universal pre-K programs for 3- and 4-year-old children provide important opportunities to foster racial and socioeconomic diversity because they allow students of all backgrounds to enroll for free.
- Many pre-K programs are designed with a focus on reaching underserved and marginalized communities. By providing targeted outreach and support, these programs help ensure that children from disadvantaged backgrounds have access to quality early education, which can contribute to reducing segregation in later educational stages.
- Pre-K programs often involve parents and families in the educational process, creating opportunities for community engagement and dialogue. This can help build stronger, more cohesive communities; foster greater understanding and cooperation across different groups; and support broader desegregation goals. Environments in which children of different racial and socioeconomic backgrounds attend pre-K schools together support learning and development for children in both middle- and low-income families (Potter, 2021).
- **Example:** [Hamden \(CT\) Public Schools](#)

- **School boundaries and student assignment**

- School boundaries determine the schools to which students are assigned or in which they enroll on the basis of their geographic residence. School boundaries often reflect the legacy of the residential segregation in that area, thereby creating public schools that are (a) highly segregated along racial, ethnic, and economic lines and (b) racially unequal in terms of resources available.
- School redistricting is the process of redrawing or adjusting neighborhood school attendance or assignment boundaries. Districts may also change attendance area boundaries by adjusting school feeder patterns to make the best use of present facilities and resources. Notably, boundaries between districts drive two-thirds of racial segregation in schools (Monarrez, n.d.), and adjusting these boundaries is challenging.
- **Examples:** [Charlotte-Mecklenberg \(NC\) School District](#), [Community School District 13 \(Brooklyn, NY\)](#), [Howard County \(MD\) Public Schools](#), and [Roaring Fork School District \(CO\)](#)

- **School mergers or school pairings**

- Combining student populations from two or more schools can be a beneficial strategy for district enrollment and resource management. In some municipalities, school mergers are used to address persistent segregation between schools in the same district. For example, district administrators may combine two or more schools with disparate demographics to create one school with a less segregated student population.
- Districts implementing school mergers must make a series of management decisions about facilities and resources, including how to arrange classroom seats, address building infrastructure, manage geographic siting for the schools, and assess funding needs.
- Merging two or more separate school communities into one also requires districts to consider and plan for the immediate and long-term implications for students, families, and staff.
- **Example:** [Joint Profile: New York City and Charlotte, North Carolina](#)

- **Open enrollment and controlled choice or equitable choice**

- Open enrollment refers to policies that allow students and their families to choose and enroll in schools outside their designated or assigned boundaries or districts. This approach provides greater flexibility and choice in selecting schools and is intended to enhance educational opportunities and improve student outcomes. By enabling students to attend schools outside their immediate neighborhoods, open enrollment can help to diversify student populations and reduce segregation based on socioeconomic status or race.
- Controlled choice or equitable choice refers to strategies designed to balance parental choice and school assignments with goals of equity and diversity. These approaches aim to (a) provide families with some level of choice in their children’s education and (b) ensure that schools remain diverse and equitable.

- Controlled choice or equitable choice programs allow families to rank their school preferences. An algorithm is then used to ensure diversity when assigning a student to a school based on such preferences. Controlled choice offers alternatives to being assigned to the local neighborhood public school, permitting families to choose among schools within a district.
- These programs often place different pedagogical themes or curricular offerings in schools across the district, which can entice some parents to select schools outside their immediate neighborhood (Perera et al., 2023).
- School choice can contribute to racial and socioeconomic school segregation. Racial preferences and anti-Black racism can inform how parents navigate choice contexts (Perera et al., 2023). Still, the design of school choice programs plays an important role in shaping the decisions that families make about school and ultimately merits further study.
- **Examples:** [Jefferson County Public Schools](#), [Oakland Unified School District](#), and [Seattle Public Schools](#)
- **Diverse-by-design schools and weighted lotteries**
 - A "diverse-by-design" school is intentionally structured to promote and sustain diversity among its students, faculty, and curriculum. The goal of these schools is to create an environment where diversity is a fundamental aspect—not an incidental outcome—of the school’s identity and operations. Therefore, such schools implement various strategies to enroll students from different racial and socioeconomic backgrounds (Potter & Quick, 2018). Diverse-by-design processes include targets and seats reserved for the enrollment of students from different demographic groups. Such schools use practices that seek to engage with the community, use less exclusionary discipline practices, and apply culturally responsive pedagogy (De Leo, 2021).
 - Diverse-by-design schools typically achieve student diversity in enrollment through weighted lotteries. Unlike a simple lottery, where each applicant has an equal chance of being selected, a weighted lottery assigns different probabilities or “weights” to different applicants based on specific criteria, such as socioeconomic status, geographic location, or other demographic characteristics. For example, students from underrepresented or historically marginalized backgrounds might receive a higher weight to increase their chances of being selected. The weighted lottery system is often used to promote diversity and ensure that certain groups of students have opportunities to access high-quality educational programs. This can help achieve more equitable enrollment and reduce disparities in school opportunities.
 - Teachers and staff in diverse-by-design schools need ongoing training in cultural competency to effectively support a diverse student body. This includes understanding different cultural backgrounds, addressing implicit biases, and implementing inclusive teaching practices.
 - Weighted lotteries do not work unless school leaders (a) create attractive schools that entice families of many different backgrounds and (b) reach out to a diverse array of families (Potter, 2019b).
 - **Examples:** [Diverse-by-design Charter schools](#) and [Larchmont Charter School](#)

- **Magnet schools, charter schools, and attractive school models**
 - Specific school models may be designed to attract a diverse set of students and families. Magnet and charter schools are often designed around attractive school models to interest families in enrollment. Magnet schools are public schools that offer specialized curricula or programs—such as science, technology, engineering, and mathematics (or STEM); International Baccalaureate programs; bilingual education; arts; or humanities—to attract a diverse student body from across a wider geographic area. Public charter schools receive government funding but operate independently of the established state school system in which they are located.
 - Some schools innovate around attractive models that transcend race and class, such as a theme or specialization that appeals to a community. These attractive models vary across communities and are most effective when tailored to a community’s interests, such as a focus on the sciences, technology, or the arts (Redding Lallinger 2024). Some districts express concern that magnet, charter, and attractive school models may counter the goals of desegregation initiatives by allowing students and families from higher resourced areas to opt-out of low-resourced public schools, thereby exacerbating school resource inequality. As a result, opinions vary on the impact of these school models on educational equity and resource distribution (Redding Lallinger 2024).
 - **Examples:** [Dallas Independent School District](#), [Denver School of Science and Technology](#), and [Larchmont Charter School \(CA\)](#)
- **School climate**
 - School climate refers to the quality and character of school life and includes ensuring that students have access to strong adult–peer relationships and safe and supportive learning environments regardless of their race or socioeconomic status. School climate is based on patterns of students’, parents’, and school personnel’s experiences of school life, and it reflects norms, goals, values, interpersonal relationships, teaching and learning practices, and organizational structures (National School Climate Center, n.d.).
 - School climate initiatives seek to foster a positive, inclusive, and equitable environment where all students can succeed and feel a sense of belonging. As such, they play a crucial role in supporting integration. For example, activities related to social-emotional learning, positive behavior interventions and supports, anti-bullying and harassment programs, and restorative practices that focus on repairing relationships and addressing conflicts through dialogue and mutual understanding can cultivate a positive school climate that creates equitable opportunities to thrive.
 - **Examples:** [National School Climate Center](#) and [Roaring Fork School District \(CO\)](#)
- **Recruitment of diverse staff**
 - By bringing a variety of perspectives and experiences into the school environment, diverse staff members help create more inclusive and equitable educational settings. Diverse representation among staff helps students feel seen and valued, which can enhance their sense of belonging

and engagement in school. It also promotes a more inclusive school culture where diverse experiences are reflected and respected.

- Diverse staff members can connect with families and communities in meaningful ways, fostering strong relationships and partnerships. Diverse representation among staff also brings a range of viewpoints to school leadership and decision-making processes, leading to more comprehensive and equitable solutions.
- **Examples:** [Denver School of Science and Technology](#) and [Roaring Fork School District \(CO\)](#)

- **Staff training and professional development**

- Ongoing training for teachers and staff on such topics as cultural competency, equity, and inclusive practices helps educators understand and address the diverse needs of their students and ensures that all staff members are equipped to support an inclusive and respectful school climate.
- Training and development initiatives also help build a more informed and supportive school environment and enhance the ability of all staff members to effectively support a diverse student body.
- **Examples:** [Roaring Fork School District \(CO\)](#) and [The Century Foundation Toolkit on Fostering Intergroup Contact in Diverse Schools](#)

- **Equity audits**

- Equity audits are comprehensive evaluations designed to assess and improve fairness and inclusiveness in schools and educational systems. Equity audits evaluate such factors as access to resources, educational outcomes, and school climate. The audits involve a systematic review of policies, practices, and outcomes to identify disparities and areas for improvement related to equity.
- Equity audits can be conducted at the district, school, department, and classroom levels. Equity audits often examine student data on performance, discipline, attendance, or a combination of those, and they contextualize outcomes based on district, school, or classroom demographics (Pendharkar, 2023). These audits can highlight differences in access to resources, such as advanced coursework, extracurricular activities, and support services. Ensuring equitable access to these resources promotes integration by providing all students with equal opportunities.
- **Example:** [Equity Audits in School Districts: An Explainer](#)

Interpersonal and individual level: Services and supports delivered to ensure individuals have access to relevant programs for housing and education needs.

Housing

- **Case management and wraparound services (as part of housing mobility programs)**
 - Case management for housing initiatives provide services that are designed to set families up for success as they make the transition to higher-opportunity areas. Case management helps organizations connect families with resources and support access to opportunities, such as job training, financial counseling, and pathways to homeownership.
 - Wraparound services provide additional resources—including connections to workforce education or health and wellness programs—that build stability, safety, and economic mobility for families. Wraparound supports also identify gaps in the availability of existing services and strategies for improving equitable access to services (Urban Strategies Inc., n.d.).
 - **Examples:** [Baltimore Regional Housing Partnership](#), [Elm City Communities](#), and [NestQuest Houston](#)
- **Advocacy and community engagement to address “Not In My Backyard” challenges**
 - Prohibitive attitudes create access barriers for voucher holders and limit affordable housing development in high-opportunity areas. “Not in my backyard” attitudes and actions include rezoning neighborhoods to exclude lower-income areas from school districts and exclusionary decision-making in council meetings or board meetings by homeowner associations. Some housing organizations have worked to shift community narratives to support residents from low-income households.
 - **Example:** [Inclusive Communities Project](#)



INTERPERSONAL AND INDIVIDUAL LEVEL

Housing

- Case management and wraparound services (as part of housing mobility programs)
- Advocacy and community engagement to address “Not In My Backyard” challenges

Education

- Culturally relevant curriculum
- Project-based learning
- Wraparound services for students and families



Education

- **Culturally relevant curriculum**

- A culturally relevant curriculum incorporates students' cultural contexts into educational content, teaching methods, and classroom interactions. Such a curriculum aims to make learning more meaningful and engaging by reflecting students' backgrounds and experiences; and it is designed to reflect a wide range of cultures, perspectives, and experiences. The goal is to provide all students with a comprehensive education that acknowledges and values diverse viewpoints and backgrounds.
- By reflecting students' cultural backgrounds in the curriculum, they are more likely to find the content to be engaging and relevant. This can increase motivation and participation, which supports their overall integration into the learning environment (Byrd, 2016). Students are also more likely to achieve academically when the content is relevant to their lives and interests (Byrd, 2016). Culturally relevant curricula can address diverse learning needs and support higher levels of achievement for all students.
- **Example:** [Larchmont Charter School \(CA\)](#)

- **Project-based learning**

- Project-based learning (PBL) is an instructional method where students work on complex, real-world problems or questions over an extended period of time. PBL emphasizes active learning, critical thinking, and problem-solving as students engage in meaningful learning opportunities around an issue that they identify and care about.
- PBL often involves collaborative work, where students from diverse backgrounds come together to achieve a common goal. This collaborative environment promotes interaction and integration among students from different cultural, socioeconomic, or academic backgrounds. Working on projects that require critical thinking and problem-solving allows students to bring their diverse perspectives and experiences to the table, enriching the learning process and fostering an inclusive environment.
- **Examples:** [Larchmont Charter School \(CA\)](#) and [The Century Foundation Toolkit on Fostering Intergroup Contact in Diverse Schools](#)

- **Wraparound services for students and families**

- Wraparound services are a comprehensive set of supports and resources provided to students to address their academic, social, emotional, and health needs. These services aim to remove barriers to learning and ensure that students have the support necessary to succeed in school.
- In school settings, wraparound services provide additional resources (e.g., tutoring support, school supplies, after school camps, devices, and transportation) to students and families. These resources build stability, safety, and economic mobility. Wraparound support may also address needs related to food insecurity, clothing, physical or mental health, and housing.
- **Example:** [Roaring Fork School District](#)

Appendix B: Steps to Inform the Pathway of Change

Step 1: Identify Systemic Barriers and Facilitators at the Level at Which the Initiative Is Being Implemented

Step 1A: Identify the level at which the initiative is being implemented

 What is your desegregation and integration initiative?

Guiding question	Response
Q1. At what level does implementation of your initiative primarily take place? <i>Select all that apply: policy level (federal, state), organizational or community level (district/local, school/neighborhood), or individual/interpersonal level.</i>	☐ Policy level (federal/state) ☐ Organizational or community level (district/local, school/neighborhood) ☐ Individual/interpersonal level

Step 1B: Identify systemic factors at this level that are facilitators and/or barriers. Work through the guiding questions and discussion prompts below with your team to identify facilitators and barriers related to context, policies, and institutions.

 Place your initiative in the specific historical, political, and socioeconomic **contexts** in which it operates to help identify context-related facilitators and barriers that influence the implementation and effectiveness of your initiative.

CONTEXT	
Guiding questions	Responses
IDENTIFY CONTEXT-RELATED FACILITATORS Q1. At the level you identified above, what context-related factors have facilitated the implementation and effectiveness of desegregation and integration initiatives? <i>Examples of historical context-related factors might include social movements that have expanded access to civil rights. Examples of current context-related facilitators might include the level of civic engagement and activism in a specific community. Look at the interactive Theory of Change for more examples.</i>	

CONTEXT	
Guiding questions	Responses
IDENTIFY CONTEXT-RELATED BARRIERS Q2. At the level you identified above, what context-related factors have posed barriers to the implementation and effectiveness of desegregation and integration initiatives? <i>Examples of historical context-related factors might include legacies of systemic racism. Examples of current context-related barriers might include the existing spatial, geographic, and/or infrastructural patterns of physical segregation.</i>	



Now that you have thought through how context influences your initiative, next think about the systemic influence of **policies**. At each level of implementation, there are different legislation and policies that may affect the initiative's scale, scope, and how it is implemented.

POLICY	
Guiding questions	Responses
IDENTIFY POLICY-RELATED FACILITATORS Q3. What current policies make it easier to implement your initiative? What policies help your initiative to be more effective? Q4. What policies or policy components might support the sustainability of your initiative? <i>For example, school boundary and redistricting policies can facilitate the implementation of desegregation and integration initiatives.</i>	
IDENTIFY POLICY-RELATED BARRIERS Q5. What policies or policy components make it challenging to implement your initiative? What policies limit the effectiveness of your initiative? Q6. What policies might limit the sustainability of your initiative? <i>For example, restrictive local zoning policies can inhibit the development, affordability, and utilization of housing, which affects the extent to which desegregation initiatives can address root causes of segregation.</i>	



Finally, think about the systemic influence of **institutions**. Formal and informal institutions or organizations may constitute a set of incentives, constraints, or norms at each level. Some institutions can support implementation of your initiative, and others may constrain your initiative.

INSTITUTION	
Guiding questions	Responses
IDENTIFY INSTITUTION-RELATED FACILITATORS Q7. Which institutions support the implementation of your initiative? Which institutions enhance the effectiveness of your initiative? Q8. Which institutions might support the sustainability of your initiative? <i>Examples include the support of local institutions, such as planning commissions and licensing boards with the authority to enact regulations, such as zoning ordinances and building permits.</i>	
IDENTIFY INSTITUTION-RELATED BARRIERS Q9. Which institutions make it challenging to implement your initiative? Which institutions limit the effectiveness of your initiative? Q10. Which institution-related barriers limit the sustainability of your initiative? <i>Examples include opposition from homeowner’s associations or housing authorities.</i>	

Step 1C: Identify levers of change. Consider the level(s) at which your organization is working to implement the initiative. Work through the guiding questions and discussion prompts below with your team to identify levers of change that address systemic factors of context, policies, and institutions.



Now that you have identified systemic facilitators and barriers at your initiative's primary level of implementation, the next step is to reflect on strategic **levers of change**. Levers of change are the context-related factors, policies, and institutions that can be harnessed to strengthen your initiative or effectively address implementation barriers. Identifying levers of change is a vital step in charting an effective and strategic course of action.

Guiding questions	Responses
IDENTIFY CONTEXT-BASED LEVERS OF CHANGE Q1. How can context-related facilitators be leveraged or harnessed to support your initiative? Q2. Are there context-related barriers that are within your initiative's capacity to address? If yes, how? <i>Examples of context-related changes might include actions that increase community awareness of the benefits of school integration. Look at the interactive Theory of Change for more examples.</i>	
IDENTIFY POLICY LEVERS OF CHANGE Q3. How can policies be leveraged or harnessed to support your initiative? Q4. Are there policies that are within your initiative's capacity to address? If yes, how? <i>Examples might include advocacy or lobbying campaigns that aim to reform housing or educational access policies. Look here for more examples.</i>	
IDENTIFY INSTITUTION-RELATED LEVERS OF CHANGE Q5. How can institution-related facilitators be leveraged or harnessed to support your initiative? Q6. Are there institution-related barriers that are within your initiative's capacity to address? If yes, how? <i>For example, changes to the composition of a school board's practices and regulations can affect transportation policies or school site locations, laying the groundwork for desegregation and integration initiatives to move forward.</i>	

Step 2: Identify How Systemic Factors Interact Between Levels

Step 2A: Identify other levels that influence your initiative



Write out the type of desegregation and integration initiative you are planning.

Guiding question	Responses
Q1. In addition to the primary level of implementation you identified earlier, what other level(s) might have an important influence on your initiative? <i>Select all that apply: federal, state, district/local, school/neighborhood, or individual.</i>	☐ Policy level (federal/state) ☐ Organizational or community level (district/local, school/neighborhood) ☐ Individual/interpersonal level

Step 2B: Identify systemic factors at different levels of influence that interact to facilitate or create barriers for your initiative. Consider the different levels of influence you identified above. Work through the guiding questions with your team to identify the systemic influences you may leverage to improve implementation and/or effectiveness.



The exercise below is designed to help you think through each of these interactions to identify potential alignments or synergies your initiative could leverage to facilitate implementation and/or improve effectiveness. Federal, state, local, and school policies and politics play a critical role in determining whether initiatives are ultimately effective. Moreover, the politics of desegregation and integration are constantly shifting, depending on the context and the balance of power between levels.

POLICY AND POLITICAL

Guiding questions	Responses
IDENTIFY POLICY- AND POLITICAL-RELATED INFLUENCES AT EACH LEVEL Q1. What are the most relevant policies operating at each level of influence that you identified? Q2. Of the policies you identified at each level, which seem to be aligned with your initiative? Q3. At each level of influence, what is the relevant political context that might affect your initiative? Q4. What political movements or groups seem to be aligned with your initiative? Now, repeat these questions for each level you identified.	

POLICY AND POLITICAL	
Guiding questions	Responses
IDENTIFY POLICY AND POLITICAL FACILITATORS BETWEEN LEVELS Q5. How do interactions between policies and political factors at different levels help your initiative? Q6. What advantages do these alignments offer your initiative? <i>For example, initiatives that promote integration through the expansion of affordable housing may be bolstered by the alignment of housing policies across district, local, and state levels. Moreover, elections can occasionally realign political coalitions and agendas to open up avenues for action that may have previously been closed.</i>	
IDENTIFY POLICY AND POLITICAL BARRIERS BETWEEN LEVELS Q7. Who might be politically opposed to your initiative? Q8. What policy and/or political misalignments <i>between</i> levels might be barriers for your initiative? Q9. What redundancies, gaps, or inefficiencies do misaligned policies and politics at different levels create for your initiative? <i>Different levels have their own policy and political realities. These factors may be at odds from time to time, which may inhibit your initiative's implementation and effectiveness. For example, each level may have different reporting or compliance requirements that might be difficult for your initiative to navigate. Moreover, despite enthusiasm to support your initiative at the district/local level, a lack of political will—or even opposition—at the state level might act as a barrier.</i>	



Now, complete a similar exercise to map out how interactions between **individual and organizational actors** at **different levels** may influence your initiative. Such actors shape the policies, practices, and institutions that operate between levels

INDIVIDUAL AND ORGANIZATIONAL ACTORS	
Guiding questions	Responses
IDENTIFY KEY INDIVIDUAL AND ORGANIZATIONAL ACTORS Q10. What are the most relevant individual and organizational actors who might have an influence on the implementation and effectiveness of your initiative? Q11. Who are the key decision-makers that operate at each level you identified? <i>Now, repeat these questions for each level you identified.</i>	
IDENTIFY INDIVIDUAL AND ORGANIZATIONAL FACILITATORS BETWEEN LEVELS Q12. Of the actors you identified at each level, who seems to operate in ways that align with the needs of your initiative? Q13. What individual and organizational actors across different levels might serve as key allies to your initiative? <i>For example, state governors, legislators, housing and education officials, and other actors collaborate with actors at the district and local levels—such as mayors, city council members, and school board members—to shape residential and educational policies and programs.</i>	
IDENTIFY INDIVIDUAL AND ORGANIZATIONAL BARRIERS BETWEEN LEVELS Q14. Of the actors you identified at each level, who may have agendas that are at odds with the goals of your initiative? Are there actors who might be working against the interests of your initiative? <i>For example, local homeowners’ groups and zoning boards may oppose desegregation and integration initiatives, such as affordable housing programs, and actively work against them.</i>	



Finally, map out how **resource allocations** across different levels may influence your initiative. Key financial and in-kind resources flow between levels, but levels of support may fluctuate over time depending on the shifting economic, political, and social contexts

RESOURCE ALLOCATIONS	
Guiding questions	Responses
IDENTIFY AVAILABLE RESOURCES Q15. How are resource allocation decisions made, and what factors at each level shape such decisions? Q16. How do resources flow between levels, and what mechanisms mediate this flow? <i>Now, repeat these questions for each level you identified.</i> <i>For example, housing assistance from federal funding can flow through local housing authorities to subsidize rent for low-income households.</i>	
IDENTIFY RESOURCE-RELATED FACILITATORS Q17. Across the different levels you identified, what kind of funding and financial resources might be available to support your initiative? Q18. What other resources—such as technical assistance, training, or human capital—might be available to support your initiative?	
IDENTIFY RESOURCE-RELATED BARRIERS Q19. What are the biggest resource needs of your initiative? Q20. What are the barriers to attaining and sustaining these resource needs? Q21. What redundancies, gaps, or inefficiencies in the existing resource landscape might adversely affect your initiative?	

STEP 2C: Identify levers of change or actions you may take based on Steps 2A and 2B. Work through the guiding questions and discussion prompts below with your team to identify how you can leverage or address the influence of interactions between the policies and politics, actors, and resource allocations at different levels.



Now that you have identified how policy- and political-related factors, individual and organizational actors, and resource allocations at different levels interact to facilitate or create barriers for your initiative, the next step is to reflect on **levers of change**. Levers of change are any of the above factors that can be harnessed to strengthen your initiative or effectively address implementation barriers. Just like you did in Step 1C, identifying levers of change is a vital step in charting an effective and strategic course of action.

Guiding questions	Responses
IDENTIFY WAYS TO LEVERAGE SYNERGIES AND POLICY AND POLITICAL ALIGNMENTS Q1. What policy or political alignments can your initiative leverage to improve implementation and/or effectiveness? Q2. In which areas could policy alignments or political coalitions be forged to support your initiative? Q3. What policy or procedural inefficiencies or gaps could be addressed through your initiative or through coordinated action with other institutions or actors and resources? <i>Policy and/or political alignments may be achieved through collective action. Strategic partnerships and advocacy efforts can lead to policy and/or political changes that might generate efficiencies or address key gaps in policy.</i>	
IDENTIFY WAYS TO LEVERAGE ALLIANCES AND PARTNERSHIPS WITH KEY ACTORS Q4. What existing alliances or partnerships can your initiative leverage to improve implementation and/or effectiveness? Q5. What <i>new</i> alliances or partnerships can your initiative forge to improve implementation and/or effectiveness?	

Guiding questions	Responses
IDENTIFY WAYS TO LEVERAGE AVAILABLE RESOURCES Q6. Across the different levels you identified, how can you access the funding and financial resources that might support your initiative? Q7. What partnerships could you explore that might unlock other resources, such as technical assistance, training, or human capital? Q8. What investments could your initiative make that might address some of its biggest needs? Q9. What resources does your initiative need to ensure longer term sustainability? Q10. How might you tap multiple funding streams across levels (i.e., braid funding) to achieve sustainability or accomplish something that is difficult to achieve through a single funding stream?	

Step 3: Assess and Prioritize Action Steps

Step 3A: Assess the levers of change you noted in Step 1C to prioritize actions

Assessment	Responses
Q1. Among the context-, policy-, and institution-related facilitators you identified in Step 1C, which do you consider to be the most <i>feasible</i> for your initiative to leverage? Q2. Among the context-, policy-, and institution-related barriers you identified in Step 1C, which do you consider to be the most <i>feasible</i> for your initiative to address? Q3. What context-specific factors, policies, or institutions could realistically be changed in the <i>short-to-medium</i> term to facilitate implementation of your initiative? Consider your organization's capacity to make these changes.	

Prioritization	Responses
Q4. Among the actions you identified above, which are the most likely to lead to meaningful change? Q5. Among the actions that you consider within your scope, which one or two actions would you prioritize to improve the implementation and/or effectiveness of your initiative?	

In continuing this exercise, you will assess and prioritize action steps based on Step 2C.

Step 3B: Assess the levers of change you noted in Step 2C to prioritize actions

Assessment	Responses
Q1. Among the policy synergies, partnerships, and resources you identified in Step 2C, which do you consider to be the most <i>feasible</i> for your initiative to leverage? Q2. Among the policy, partnership, and resource gaps and/or inefficiencies you identified, which do you consider to be the most <i>feasible</i> for your initiative to address?	
Prioritization	Responses
Q3. Among the actions you identified above, which are most likely to lead to meaningful change? Q4. Among the actions that you consider to be within your scope, which one or two actions would you prioritize to improve the implementation and/or effectiveness of your initiative?	

Step 4: Inform Strategic Planning

Instructions: Use this action plan template to outline the strategies/activities, responsibilities, resources, and timeline that your team will follow to take action on the three priorities you identified during Step 3. Complete a separate action plan for each strategic priority. While this is a possible tool for action planning, we encourage you to integrate these action steps into existing action planning processes that your organization may have for other aspects of your initiative’s design.

Strategic Priority 1 (Action Step)

Strategy/activity detail	Staff responsible	Resources needed	Start date	End date

Strategic Priority 2 (Action Step)

Strategy/activity detail	Staff responsible	Resources needed	Start date	End date

Strategic Priority 3 (Action Step)

Strategy/activity detail	Staff responsible	Resources needed	Start date	End date

Appendix C: References

- American Institutes for Research. (n.d.). *A framework for change: Mapping connections between systems, communities, and schools*. <https://www.air.org/theory-of-change>
- Byrd, C. M. (2016). Does culturally relevant teaching work? An examination from student perspectives. *Sage Open*, 6(3). <https://doi.org/10.1177/2158244016660744>
- Centers for Disease Control and Prevention. (n.d.). *The social-ecological model: A framework for violence prevention*. Education Resources Information Center, Institute of Education Sciences, U.S. Department of Education. <https://files.eric.ed.gov/fulltext/ED556109.pdf>
- Chemerinsky, E. (2003). The segregation and resegregation of American public education: The court's role. *North Carolina Law Review*, 81, 1597–1622. https://scholarship.law.duke.edu/faculty_scholarship/805
- Chetty, R., & Hendren, N. (2018). The impacts of neighborhoods on intergenerational mobility I: Childhood exposure effects. *The Quarterly Journal of Economics*, 133(3), 1107–1162.
- Darling-Hammond, L. (2001). Inequality in teaching and schooling: How opportunity is rationed to students of color in America. In B. D. Smedley, A. Y. Stith, L. Colburn, & C. H. Evans (Eds.), *The right thing to do, the smart thing to do: Enhancing diversity in the health professions: Summary of the Symposium on Diversity in Health Professions in Honor of Herbert W. Nickens, M.D.* (pp. 208–233). National Library of Medicine. <https://www.ncbi.nlm.nih.gov/books/NBK223640/>
- De Leo, D. (2021, September 8). *Diverse-by-design charter schools are making a difference* [Blog]. School Improvement Partnership. <https://schoolimprovementpartnership.net/diverse-by-design-charter-schools-are-making-a-difference/>
- Fischer, W., Acosta, S., & Gartland, E. (2021, May 13). *More housing vouchers: Most important step to help more people afford stable homes*. Center on Budget and Policy Priorities. <https://www.cbpp.org/research/housing/more-housing-vouchers-most-important-step-to-help-more-people-afford-stable-homes>
- HUD User, Office of Policy Development and Research. (n.d.a). *Low-Income Housing Tax Credit (LIHTC)*. <https://www.huduser.gov/portal/datasets/lihtc.html>
- HUD User, Office of Policy Development and Research. (n.d.b). *Moving to Opportunity*. <https://www.huduser.gov/portal/mto.html>

- Harper Browne, C. & O'Connor, C. (2021). *Social ecological model of racism & anti-racism*. Center for the Study of Social Policy. https://cssp.org/wp-content/uploads/2021/12/Racism_Anti-Racism_Social_Ecological-Graphic_01112023.pdf
- Monarrez, T. (n.d.). *Policies available to school districts to dismantle racial segregation in public schools*. Urban Institute. <https://www.urban.org/racial-equity-analytics-lab/structural-racism-explainer-collection/policies-available-school-districts-dismantle-racial-segregation-public-schools>
- National School Climate Center. (n.d.). *What is school climate and why is it important?* <https://schoolclimate.org/school-climate/>
- Orfield, O. (1996). Turning back to segregation. In G. Orfield & S. E. Eaton (Eds.), *Dismantling desegregation: The quiet reversal of Brown v. Board of Education* (pp. 1–12). New Press.
- Pendharkar, E. (2023, April 19). *Equity audits in school districts: An explainer*. Education Week. <https://www.edweek.org/leadership/equity-audits-in-school-districts-an-explainer/2023/04>
- Perera, R. M., Carlson, D., Domina, T., Carter III, J., McEachin, A., & Radsky, V. (2023, July 27). *Can school choice support district-led efforts to foster diverse schools?* Brookings. <https://www.brookings.edu/articles/can-school-choice-support-district-led-efforts-to-foster-diverse-schools/>
- Pinto, T. K. (2023, December 11). *High schools across California eliminate honors classes in favor of an 'Honors For All' approach*. Los Angeles Times High School Insider. <https://highschool.latimes.com/windward-school/high-schools-ca-eliminate-honors-classes/#:~:text=In%20an%20effort%20to%20address,get%20rid%20of%20honors%20classes>
- Potter, H. (2019a, January 29). *Integrating classrooms and reducing academic tracking: Strategies for school leaders and educators*. The Century Foundation. <https://tcf.org/content/report/integrating-classrooms-reducing-academic-tracking-strategies-school-leaders-educators/>
- Potter, H. (2019b, January 29). *Recruiting and enrolling a diverse student body in public choice schools: Strategies for school and district leaders*. The Century Foundation. <https://tcf.org/content/report/recruiting-enrolling-diverse-student-body-public-choice-schools/>
- Potter, H. (2021, May 27). *We must seize the opportunity for integration in universal pre-K*. The Century Foundation. <https://tcf.org/content/report/must-seize-opportunity-integration-universal-pre-k/>

- Potter, H. (2024, May 15). *70 years after Brown v. Board, Americans committed to finishing the job of school integration*. The Century Foundation. <https://tcf.org/content/commentary/70-years-after-brown-v-board-americans-committed-to-finishing-the-job-of-school-integration/>
- Potter, H., & Quick, K. (2018, May 15). *Diverse-by-design charter schools*. The Century Foundation. <https://tcf.org/content/report/diverse-design-charter-schools/>
- Promise Neighborhoods. (n.d.). *About Promise Neighborhoods: Program and partners*. <https://promiseneighborhoods.ed.gov/background/about>
- Randazzo, S. (2023, October 9). *Schools cut honors classes to address racial equity. It isn't a quick fix*. The Wall Street Journal. <https://www.wsj.com/us-news/education/schools-cut-honors-classes-to-address-racial-equity-it-isnt-a-quick-fix-77d32e83>
- Redding Lallinger, S. (2024, July 27). *How charter, magnet, and innovative district schools can help overcome school segregation*. The Century Foundation. <https://tcf.org/content/report/how-charter-magnet-and-innovative-district-schools-can-help-overcome-school-segregation/>
- Scally, C. P., Gold, A., & DuBois, N. (2018, July). *The low-income housing tax credit: How it works and who it serves*. Urban Institute. https://www.urban.org/sites/default/files/publication/98758/lithc_how_it_works_and_who_it_serves_final_2.pdf
- U.S. Department of Housing and Urban Development. (n.d.a). AFFH notice of proposed rulemaking. In *Affirmatively Furthering Fair Housing (AFFH)*. https://www.hud.gov/AFFH#_AFFH_notice
- U.S. Department of Housing and Urban Development. (n.d.b). *Affirmatively Furthering Fair Housing (AFFH)*. https://www.hud.gov/AFFH#_What_is_AFFH
- U.S. Department of Housing and Urban Development. (n.d.c). *Choice Neighborhoods*. <https://www.hud.gov/cn>
- U.S. Department of Housing and Urban Development. (n.d.d). *The Fair Housing Act*. In *Housing discrimination under the Fair Housing Act*. https://www.hud.gov/program_offices/fair_housing_equal_opp/fair_housing_act_overview#The_Fair_Housing
- U.S. Department of Housing and Urban Development. (n.d.e). *What are housing choice vouchers?* In *Housing Choice Vouchers fact sheet*. https://www.hud.gov/topics/housing_choice_voucher_program_section_8#hcv01
- U.S. Department of Housing and Urban Development. (2024, May 31). *Community Development Block Grant Program*. https://www.hud.gov/program_offices/comm_planning/cdbg

U.S. Department of Justice, Civil Rights Division. (2023, June 22). *The Fair Housing Act*.
<https://www.justice.gov/crt/fair-housing-act-1>

Urban Strategies Inc. (n.d.). *How we support*. <https://www.usi-inc.org/initiatives/>



1400 Crystal Drive, 10th Floor
Arlington, VA 22202-3289
+1.202.403.5000 | AIR.ORG

Established in 1946, the American Institutes for Research® (AIR®) is a nonpartisan, not-for-profit organization that conducts behavioral and social science research and delivers technical assistance both domestically and internationally in the areas of education, health, and the workforce. AIR's work is driven by its mission to generate and use rigorous evidence that contributes to a better, more equitable world. With headquarters in Arlington, Virginia, AIR has offices across the U.S. and abroad. For more information, visit [AIR.ORG](https://www.air.org).

Copyright © 2024 American Institutes for Research®. All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, website display, or other electronic or mechanical methods, without the prior written permission of the American Institutes for Research. For permission requests, please use the Contact Us form on AIR.ORG.

Notice of Trademark: "American Institutes for Research" and "AIR" are registered trademarks. All other brand, product, or company names are trademarks or registered trademarks of their respective owners.

25552_11/24