



EQUAL OPPORTUNITY SCHOOLS: FINDING THE MISSING STUDENTS

I've had a number of superintendents say, "This is a longer term process, you don't understand, I've been in this for decades, nothing happens in a year" and then come back and say, "Oh my gosh, this can happen in a year. We talk about closing the achievement gap or getting college ready, and we miss [the goals] by a mile time and again. But here is this group that is showing me a typical gap that 99 percent of schools have that's closed a year later."

—Reid Saaris, Executive Director, Equal Opportunity Schools

During his second year as a high school teacher in South Carolina, Reid Saaris observed something that had haunted him once before. Carl, a student whom he knew to be highly academically capable, was registered for lower-level classes. Saaris thought back to his own high school experience—he had taken advanced college preparatory classes while his best friend, whose mother had dropped out of school after 8th grade and struggled to raise five children as a single parent, was placed in less challenging courses. “So not only had she never experienced high school, she didn’t have the time to figure out how to navigate the bureaucracy.” Saaris went on to study at Duke and then Harvard while his friend spent “the next decade and a half trying to make up for what was lost.” This time, however, as a high school teacher, Saaris could intervene. “I just felt really strongly that here’s this moment when it could go either way and there was no one else to make that call. I had a gut feeling that Carl should be upgraded to these tougher courses.” The two went to the school office where Saaris switched the aspiring young man into advanced-level courses.

Davina Drabkin and William F. Meehan prepared this case as the basis for class discussion rather than to illustrate either effective or ineffective handling of an administrative situation. Unless otherwise noted, information and quotes in this case come from the following interviews and sources: Alexa Llibre, Manager, Strategic Initiatives, and Luke Justice, Senior Director, Strategic Initiatives, April 23, 2015; Reid Saaris, Executive Director, April 30, 2015; Jeffrey Feucht, Ed.D., Assistant Superintendent for Educational Services, Glenbard District #87 May 22, 2015; Lori Grace, Ed.D., Executive Director of Curriculum and Instruction, Twin Rivers Unified School District, June 19, 2015; Ron Severson, Superintendent, Roseville Joint Union High School District, June 18, 2015; and Equal Opportunity Schools website, <http://eoschools.org/our-story/>.

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Carl was African American and Saaris observed that most African-American students at the school were enrolled in lower-level courses. “Many students were the victim of there being no system to really make sure that kids were consistently matched with challenging learning opportunities and so there was a significant under-representation of students of color and low income students in the advanced courses.” As Saaris walked down the hallway, he could see “on one side a 12th grade English class playing an all-class game of hangman and half of the kids asleep with their teacher saying, ‘Who wants to guess the next letter?’ And on the other side, kids debating and discussing interesting literature and ideas about citizenship.” Carl had almost become “one more incredibly talented student assigned to the lowest level courses like most African American students in the school.”

The following year, Saaris was promoted to running the school’s advanced programs. Inspired, he led an initiative to “find all the missing students” from the Advanced Placement (AP) and International Baccalaureate (IB) programs at the school, meeting with every 10th grader, approximately 400 students. AP and IB classes, designed to provide a head start on a college education, culminated with rigorous exams and gave students an opportunity to earn college credit. Saaris used “a large variety of data and conversations with them about the level of challenge that they were experiencing academically, comments from teachers about how [students] could achieve at higher levels, finding out students’ areas of interest, and really working to make sure that everyone got matched with a challenging class.”

The initiative had a stunning impact. Within one year, the school’s AP and IB programs had doubled in size, with the number of African-American students in advanced classes tripling. At the same time, the success rate for all students on the AP and IB exams increased by 20 percent.

TAKING IT TO A NATIONAL SCALE

In 2007 Saaris began to collaborate with the Education Trust, a non-profit advocacy group based in Washington, D.C., “to count the number of missing students nationwide.” He and the Education Trust shared data with the two organizations that ran the AP and IB programs, the College Board and the International Baccalaureate Organization, as well as the U.S. Department of Education. The big takeaway was that although African-American, Latino, and low-income students were about as likely as their white or higher-income peers to attend schools that offered AP and IB classes, they were much less likely to be enrolled in those classes. Each year, about 640,000 students in these sub-groups who had demonstrated ability to handle academic rigor were not enrolled in AP and IB classes (see **Exhibit 1**).

A year later, Saaris headed out to Stanford University. He had been accepted into a joint degree program between the Graduate School of Business (GSB) and the Graduate School of Education (GSE),¹ the only program to which he had applied. The question that motivated Saaris to go to graduate school was the same question around which he would subsequently design all of his class projects: “How do I take what I’ve learned at a school [in South Carolina] through an experience there and figure out the path between that and the two-thirds of a million missing

¹ In 2013, the Stanford University School of Education (SUSE) changed its name to the Stanford Graduate School of Education.

students that we found in our national research? It seemed to me that the place to go would be a business school where there's real expertise in scaling organizations.”

Saaris met Bill Meehan, a GSB lecturer and former director at McKinsey & Company, and wound up taking a number of his classes. Saaris recalled Meehan's Strategic Management of Non-Profits class where “I was doing a lot of thinking about how we get clear on what our mission is. To benefit from business practices, you have to figure out your bottom line as a non-profit—you have to define it and you can actually build out everything you do around that. We did a lot of work around that.” According to Saaris, Meehan went on to be “very supportive in helping me and a team of students during the Exploring Entrepreneurial Opportunities course—two quarters long of building out the Equal Opportunity Schools business plan and connecting with early funders. That business plan became the basis for the Stanford Social Innovation Fellowship which was our first funding.”

A Pilot Project

The Education Trust had connected Saaris with the San Jose Unified School District, which became the focus of numerous class projects and pilot work that he did while at Stanford. The district had raised its graduation requirements a few years prior and found comparable rates of graduation, even with the higher standards. In addition all students were accessing college at higher rates. Saaris approached San Jose, pointing out, “You have tackled the equity question; students of all backgrounds can do the work. Academic intensity is the biggest driver of college completion so why not have students complete at least one college-level course successfully before they're asked to take on four or five or six a term when they go off to college? Let's take that next step together.”

San Jose Unified signed on to a pilot project that involved three of its six high schools. Saaris did an analysis after the first year and “found that 95 percent of the growth in access...came out of those three schools. And this without a decline in the rate at which students passed an AP or IB exam.” Just like at the high school in South Carolina, Saaris had achieved impressive results in a single year.

Business Model

The revenue model for Equal Opportunity Schools (EOS) grew out of the bottom line orientation that Meehan had helped instill in Saaris. Saaris did not want to create an organization with two distinct arms—“one that has the foundations and high net-worth individuals and the other that has the clients, the schools that we are serving. So we've been very intentional about building a robust earned revenue model.” The business plan called for two five-year periods, the first of which was about “implementation and building the business model and the revenue model.” That included establishing consultants in the schools, finding the missing students, and helping “superintendents and principals break through and get a sense of what's possible.” The second period would be about building scale “by taking what we have learned to find national tipping points. That might be partnerships with organizations like the College Board, ways to do more train-the-trainer, working with states on state policy.”

In 2010, upon graduating from his dual degree program, Saaris was awarded the Stanford Social Innovation Fellowship. The award came with \$80,000, the first funding that EOS received. Saaris incorporated the non-profit in Seattle, Washington, where he had been raised, and hired the first employee, Niambi Clay, a GSB/SUSE joint degree graduate, in February 2011, followed by more staff members just a few months later.

LAUNCHING EOS

Saaris spent 2011 putting the foundations of the EOS organization in place. He described the services that EOS provided as data analysis, consulting, and management leadership and guidance to help school districts set a data-driven strategy to fully close access gaps to advanced classes in a single year.

Despite the lofty goal, getting the attention of school district leaders proved challenging and drove home the importance of relationships. At an education conference in Seattle, it was not until the very end when a well-known non-profit executive introduced Saaris to a couple of superintendents and foundation executives that Saaris got any traction. “[She] was able to accomplish in five minutes what I couldn’t do in ten hours. [During all of my attempts], as soon as [the superintendents] had any inkling that I had a service to offer them, their eyes would glaze over, they would look away distractedly and find an opportunity to exit. Every one of her introductions turned into a grant or a contract to work with schools.” The experience got Saaris thinking about how to gain credibility as well as visibility so that EOS would not simply be lumped in as another “vendor under pressure to sell.”

Relationships were also how Saaris found his largest funder. An advisor introduced him to a program manager for Google’s Global Impact Awards. “We had a few phone calls, one in-person meeting, and a five-page Google doc back and forth and [Google] wired us \$1.83 million.” With that grant, EOS formally launched its AP/IB Equity and Excellence Project through which it would partner with schools to close the participation gap in advanced classes.

By the February of 2011, EOS had a few district partnerships in place. Since it was more than halfway through the 2010-2011 school year, that left only a few months to identify students for the next academic year (2011-2012). According to Saaris, that pace turned out to be “way, way too fast for schools. We really pissed some people off—they were already building their schedule for next year and we say, ‘Well let’s change all that, let’s make sure we include all these other students.’ We learned some tough lessons that first year and got a longer runway.”

OUTREACH AND RECRUITMENT

By the start of the 2014-15 academic year, EOS had a two-person strategic initiatives team that focused on expansion. Alexa Llibre served as manager and Luke Justice as senior director. Saaris set the goal of doubling the number of partner schools for each year, so for 2015-2016, that meant partnering with 140 new schools. Llibre and Justice started the process by analyzing data about student demographics and AP/IB participation rates to identify regions with high schools that might be a good fit. Based on the significance of leveraging relationships and the support provided by having a geographic peer group, EOS believed that it would be more

successful if it could create local communities of schools or districts working to identify missing students. Justice explained, “It’s not just an economy of scale—efficiency for EOS; this is really challenging, socially complex equity work and principals and district leaders need a community of practice with neighboring districts to feel like this is actually something that they can accomplish together.”

EOS was looking for diversity in a school population and rigor in the AP or IB program. It began with demographic data from the National Center for Education Statistics (NCES), the Department of Education’s primary entity for education-related data. EOS analyzed overall student enrollment in 11th and 12th grade (when AP and IB classes were usually taken), the number of students taking AP or IB classes, and the demographic profiles of schools in a region. The data shared by the College Board and the Office of Civil Rights (U.S. Department of Education) allowed Llibre and Justice to then look by school at the number and demographic make-up of students taking AP exams. They examined the rigor of the advanced program—the percentage of students taking an AP or IB exam and passing it— “because we don’t want to place students into an AP program where 98 percent of the students fail the exam.” Then they analyzed demographic ratios. Llibre explained, “We have enough data to say ‘there are 100 students who are white or Asian at this school and 99 percent of them took the AP exam. But there are 100 students who are Latino and only five of them took an AP exam.’ Well, 99 percent of the Latino students should be taking the AP exam if 99 percent of white and Asian students are.” A region with schools that showed these patterns was potentially a good match to partner with EOS.

Another important criterion was having what Llibre called a “regional convener,” someone with access to a group of districts with whom EOS could connect. Was there a contact that “would serve as a good convener for an event, and also for future partnerships and future development of the work around equity?” Saaris was “generally looking for opportunities to have a county superintendent actually convene the district superintendents.” Llibre gave the example of California where EOS often worked with a county office of education to connect with the districts. “We may host an event or just have them tie us into an existing meeting they have with their superintendents. That allows us to ensure that no school or district would be doing the work in a vacuum and that they’ll have discussions and a robust community around [student] equity.”

See [Exhibit 2](#) for application process and approximate timeline.

Educational Leadership Conversation

Once the EOS team identified regions that met its criteria as potential matches, Llibre and Justice set up events. They sent out e-mail invitations to superintendents and others district leaders focused on curriculum and equity and included the results of their preliminary research. Based on that research, the team believed that it had identified X number of students who were low income or of color who had the opportunity to enroll in the district schools’ AP or IB programs but were not enrolled. EOS also had identified the district’s AP or IB programs as being strong and wanted to help enroll those additional students (see [Exhibit 3](#) for sample invitation). Llibre and Justice followed up with phone calls and personalized e-mails and typically had about 25

percent of invitees attending. Saaris noted, “It’s a sign of credibility—the Google award, working with folks at the Harvard Education Innovation Laboratory,² working with regional leads and [benefitting from their] relationships—that we do get folks into the room for a two-hour long what we call an educational leadership conversation.” Jeff Feucht, Ed.D., assistant superintendent for educational services for Glenbard District #87 in Illinois, concurred: “[The invitation said] they had identified us based on our data and the gains that we had made with students in AP courses. I was compelled, and honestly, the Google brand name helped...I had a lot of respect for [EOS due to] the fact that Google had partnered with them. They had been vetted so I figured it was worth a two-hour breakfast meeting.”

At the leadership conversation, EOS staff highlighted Saaris’s work at the Education Trust around missing students and dove into regional and school-level findings. Justice or Saaris described the EOS partnership model, results from past partnerships, and the impact of rigorous coursework on college readiness. Schools often at least doubled the participation of low-income students and students of color as early as the first year. By the summer of 2014, EOS had worked with 63 districts across 11 states to upgrade over 10,000 students to succeed in AP and IB classes. A big concern of many attendees, however, was around whether expanding the advanced programs would result in a decline in exam pass rates and the quality of the program. The team emphasized its data showing that “found” students were not only taking the advanced classes, but were also succeeding (see [Exhibit 4](#)). According to Llibre, “Generally speaking, the vast majority of our schools do not see any decline in program quality, grades, or exam scores.”

The work that EOS did on Carol Dweck’s concept of mindset got the attention of district leaders. According to Dweck, a Stanford psychologist, in a growth mindset, people believe that their most basic abilities can be developed through dedication and hard work. Teaching a growth mindset creates motivation and productivity.³ Lori Grace, executive director of curriculum and instruction at Twin Rivers Unified School District, “One of the things that intrigued us the most is Equal Opportunity Schools’ focus on Dweck’s work around mindset. That was a huge, huge factor for us in even starting to look at them. I think that is their biggest selling point that...they focus on more than just a score. For us, it is mission critical that our teachers approach our kids with a growth mindset.” Ron Severson, superintendent of Roseville Joint Union High School District agreed. “I am a huge fan of Carol Dweck and [her work on] mindset. I immerse most of my staff in her work and really believe that it is a critical piece in education.”

Severson explained what he saw as unique about the EOS approach:

That was the first time I had ever heard anybody talk about really trying to calibrate and determine mindset of teachers, and the impact that has on students. And the fact that [mindset] was part of the survey information that [EOS was] gathering when they worked with a high school staff—I hadn’t found anybody else in the country...that really had a plan on how to do that. Everyone says how

² EOS was working with Will Dobbie, assistant professor of economics and public affairs at Princeton University and faculty research fellow at the Education Innovation Laboratory at Harvard to evaluate the effectiveness of the AP/IB Equity & Excellence Project. The study would be the first ever gold-standard, random (school-level) assignment study of the impact of AP and IB on college completion.

³ Carol Dweck, “Mindset,” <http://mindsetonline.com/whatisit/about/index.html> (July 7, 2015).

important it is but hardly anybody has really come up with a pragmatic way to assess [mindset] and implement and incorporate it into the work that we do in schools. That really captivated me from the beginning.

The other piece that impressed Severson was the student profile. “Most of the efforts [and] research focus on these groups of kids as sort of nameless entities. EOS didn’t do that...the little card you get on each student is very personal.” He was captivated by the idea that “We’re going figure out what each kid’s story is. What are their strengths? Not just their weaknesses and their obstacles...and use that story to help draw them into this whole AP experience.”

Feucht also walked away from that first meeting captivated by the opportunity. He felt that EOS did “a great job of starting with the why” and “focusing on students and student learning, introducing really compelling statistics nationwide about what they called missing students, about students that could be challenged that aren’t, and some pretty direct discussion about how our systems are not serving low-income and minority students.” What was fuzzy, however, was the cost. “They didn’t talk about the money very much and at the end, they got questions, and then we got the number.” The price to participate in the partnership starting in the 2015/2016 academic year was \$29,000 per school. “I felt from them that they had had districts respond with sticker shock so they intentionally didn’t focus on the money.”

Data Submission and Analysis

After the educational leadership conversation, districts submitted current district or school-level demographic and AP/IB data (although NCES data gave EOS a starting point, it was three years old). EOS collected data and provided districts with a secure data submission link. In return, each district received a customized analysis around participation levels benchmarked against state and national data. The analysis, much of it presented in the form of charts, included a breakdown of existing participation in advanced classes by low-income and students of color and identification of how many more could be participating. EOS also included a template for its Student Profile card. Should the district decide to partner, EOS would then help develop a profile card for each student in the target group (see [Exhibit 5](#)). The card summarized assets and facts about each student, creating an in depth and systematic profile. Although Llibre had reviewed data from several dozen school districts, “it’s still surprising to me, when we get all those data submissions from schools in the application cycle, how similar all that data is. Across states, across schools, across districts, across regions—this [disparity in access] is really systematically happening.”

Optional Webinars

Falling between the data submission and letter of intent (LOI) phases, Justice considered the EOS webinars to be the key part of the application process. They were a “meet-the-team” event often attended by a larger cross-section of leaders, including school leaders such as principals, from applicant districts. Applicants heard from past school partners as well as the specific EOS staff with which they would be working. “With past school partners on the webinar, it’s a much richer conversation that’s really story-specific. So it’s, ‘how did this program play out at Kent-Meridian High School in south Seattle? Here’s Wade Barringer, visionary principal, to talk

about what his experience was increasing by 3X participation in IB among underrepresented populations in a single year.” Justice described the webinars as an important touch point with “multiple messages and multiple messengers to get [applicant districts] to a place where leaders feel like ‘Yes, I get this. There’s a great opportunity here and I see this as a value equation, an investment in my system, not just a price tag.’”

Letter of Intent and Memorandum of Understanding

EOS asked districts to sign a non-binding letter of intent (LOI). It included questions around a district’s existing efforts on equity in upper-level courses, how partnering with EOS would fit with the equity work, and what the district would be willing to commit to the partnership and moving the equity work forward. Commitments usually included changing board policy, opening up AP and IB enrollment to any interested student, and securing resources for after-school study halls. Approximately 20 percent of conversation attendees signed the LOI.

With the submission of the LOI, EOS considered the application complete. It reviewed all applications to select participants based on how closely the data fit EOS criteria as well as the district’s leadership characteristics. For the 2014-2015 academic year, EOS received 50 percent more applicants than it could accept.

The final step to initiate the partnership was a Memorandum of Understanding (MOU). The MOU was the official contract and once it was signed, EOS’s director of partnerships began conversations with the district about the onboarding process. Almost 70 percent of districts that signed the LOI subsequently signed the MOU.

BARRIERS

The main roadblock that Saaris encountered was what he called risk aversion. He had observed that the culture of schools did not always inspire or support innovation, but rather encouraged people to avoid what could be construed as somewhat controversial. “The risk that a lot of superintendents are managing against is more about, ‘Am I going to get fired by my board? Is this going to hit the newspaper in a way that will make it hard for me to keep my job?’” Many of the superintendents with whom Saaris interacted understood the equity issue but were deterred by the pushback they worried might come from one or more of their constituencies—the board, teachers, parents, and their communities.

The risk seemed to go hand-in-hand with credibility. Saaris found that in the first two years, it was much harder to establish traction with superintendents because “they don’t love the message ‘come pioneer the trail here on this issue.’ Risk has been a huge part of the early story—how do you get those early adopters that are willing to push something in a new way?” A few years in, however, with more than 60 districts on board and considerable attention from non-profit organizations, Saaris was optimistic that EOS was hitting a sort of tipping point. According to Saaris, an expert had told him, “EOS conversion rates, when we get people in the room, are outrageously high.” Saaris attributed that “to the strength of opportunity that we’re offering people to really connect with their true purpose as educators—to change students’ lives for the

better and to really connect with a higher sense of what's possible for the future, especially for those students who folks haven't thought could be successful before."

Llibre, who handled much of the follow up correspondence with districts, grouped the barriers that she encountered into four general buckets. The biggest was what she called "we just don't know" and was particularly vexing because "they don't respond [so] it's difficult to really get the reason behind that." The other buckets were: price, priorities and resources, and ideology."

Price

Feeling that the price was too high was an issue that EOS viewed as an opportunity to problem solve, often through a payment plan or considering a future budget cycle. Llibre commented, "So that's definitely something that isn't a hard no because we want to work with schools and we can figure out how to make that work for them." Severson wanted to implement the EOS partnership at all five of his comprehensive high schools, which for the 2014/15 academic year, came with a \$24,000 price tag per school for a total of \$119,000. To put that number into perspective, his district had budgeted \$150,000 over the previous three years to provide professional development for teachers to transition to the Common Core curriculum that California implemented in the 2014/15 school year. "We're talking about something that impacts every classroom, every teacher in our school district. And that was the amount of money we felt comfortable with in our core budget. So \$125,000 to impact a few hundred kids—our initial target—was a huge financial commitment. If we had not had our [Local Control and Accountability Plan] LCAP money,⁴ we would not have been able to do something like this. So the timing was perfect for us."

While the cost was certainly a roadblock for some districts, Saaris reflected on the unusual incentives he often encountered: "Districts would hate the message that they're paying the full fare and really like the message that they're getting a discount or that a funder is subsidizing part of the cost. Even though our program is affordable and we've worked very hard to keep the costs down, they love the message that they're getting a subsidy or...a match grant because that is what they're used to seeing."

Feucht's thoughts on the cost were centered on the value proposition. Indeed, EOS had conducted some preliminary research around value with students at the University of Washington. The results confirmed that the EOS approach offered one of the highest possible increases in college readiness on a per dollar basis. According to Saaris, "college readiness is a very common goal. If [districts] have a set of money, they should ideally want to spend it on what is going to give them the most bang for their buck." Feucht was looking for a concise

⁴ Under the Local Control Funding Formula (LCFF), signed into law on July 1, 2013, districts received a uniform base grant adjusted by grade level, plus additional funds for students with greater educational needs, defined as low-income, English learner, and foster youth students. Districts received an additional 20 percent of the base grant based on the numbers of these students enrolled, and a higher amount when they made up more than 55 percent of enrollment. Districts had to adopt a Local Control and Accountability Plan (LCAP), describing their goals for improving student outcomes according to eight priorities set by the state (one of which was course access). Each district was required to demonstrate how its budget would help achieve those goals. Source: "Local Control Funding Formula," California Department of Education, <http://www.cde.ca.gov/fg/aa/lc/> and "Local Control Funding Formula Guide," EdSource, <http://edsources.org/publications/local-control-funding-formula-guide> (June 24, 2015).

summary quantifying just how much he would get for the \$29,000 per school investment. He was very impressed with the EOS tools, especially “the Student Profile—the one pager with the student’s picture and assets that was the biggest selling point for people in the room. That was very, very powerful.” However, he wanted to see EOS do more to outline the value of “what they provided, and the cost that we would incur if we did it ourselves.” At the end of the educational leadership discussion, according to Feucht, “We were blown away and they just said, ‘Your portion is \$29,000.’” Instead, he wanted to hear, “‘Yeah, we know 29 grand is a hard sell. Here’s a slide or a one pager that you can show your board about [the value of] what you’re getting on our side for your commitment.’”

Priorities and Resources

Partnering with EOS meant that a district had to commit time and resources to the collaboration. The data submission alone could require a substantial staff effort, and that was a prelude to the next steps of surveying students and teachers. Districts were keen to align resources with priorities and Libre would sometimes hear comments such as, “The State of Oregon just cut however many million dollars from education and now we are really in trouble. So maybe next year, but not this year.” Justice concurred that timing impacted interest:

So we get: “I’ve got a new principal that’s coming on and I just don’t think that this is something that they can prioritize.” Or they’ve got, more generally, initiative-fatigue. They’re going through Common Core State Standards implementation and they’re implementing other programs. Or there’s too much chaos and too many other things going on that they just can’t imagine, as much as they may like the program, adding that to the plate of school administrators.

That was the case for Grace and Twin Rivers. The district had applied for the 2014/15 school year and went through the step of surveying to examine its internal gap in AP and IB enrollment. Compared to statewide data, her district was actually above in several areas. Grace described Twin Rivers as incredibly diverse, primarily made up of students of color and with upwards of 88 percent of students socio-economically disadvantaged. Grace shared why Twin Rivers decided not to move forward with EOS: “We are a [Program Improvement] PI district⁵ and we have lot of improvements to make very, very quickly. Is this the most important thing, and is this going to be the highest leverage thing right now for us to make the improvements we need, when we’re already doing a very good job as far as updrafting our students by comparison?” She considered what the EOS partnership required of principals and school site staff as well as other

⁵ The Elementary and Secondary Education Act (ESEA) required all states to implement statewide accountability systems based on challenging state standards and annual statewide progress objectives ensuring that all groups of students reached proficiency. Assessment results were disaggregated by socioeconomic status, race, ethnicity, disability, and limited English proficiency. The No Child Left Behind (NCLB) Act of 2001 required states to measure “adequate yearly progress” (AYP) for schools receiving Title I funds and hold them accountable for all students reaching the proficient level on mathematics and reading/language arts standardized tests by the 2013-2014 school year. Title I schools that failed to meet AYP targets for two or more years were designated “in need of improvement” and faced specific consequences and required actions. Such schools were often referred to as Program Improvement or PI schools. Source: “Program Improvement,” California Department of Education, <http://www.cde.ca.gov/ta/ac/ti/programimprov.asp> and “No Child Left Behind Requirements for Schools,” Great Schools, <http://www.greatschools.org/definitions/nclb/nclb.html> (June 29, 2015).

options such as the AP Potential product. She also thought about how Twin Rivers was actually a fairly new district, with four districts unifying in 2008 to form it. “It really feels like we are in year three of the unification [in terms of] having standardized policies, infrastructure, and consistency throughout the district. That is incredibly important. Sometimes if you roll great things out too early, they just flop and you’ll never get back to them.” Partnering with EOS as all about the “right time, right place. It’s something that I see us possibly doing in the future once we have the infrastructure built to support it and make it work.”

Because timing could always present a challenge, Justice emphasized that EOS built upon a program that the district already had in place. “This is all about getting kids access to the AP infrastructure that already exists. And therefore it’s not as big of a lift as they think it is.” Regardless of timing, however, Severson stressed, “The mindset of the district is vital. And if they aren’t committed to equity, then this is not a great investment of money. If you have a director or principal that thought this was a great idea and you’re trying to force that into a district culture that doesn’t embrace this kind of work, it’s going to be a challenge.”

Other districts were trying to address equity issues in a different way. Llibre would hear comments such as, “We have a lot of other state or county or nonprofit partnerships that we’ve already committed to. So, while we are interested in this work, maybe we’ll talk to you in the future or just rely on other work we’re [already] doing.” Such districts might have already done some expansion work with their AP classes and want to measure outcomes differently—for example, around gender (i.e., girls in science) or dual enrollment (taking courses at the local community college for college credit). According to Saaris, “they may talk about doing work in this area but often there’s not enough attention to making the breakthrough that would be needed to fully close an equity gap and really elevate the sense of what’s possible for low-income students and students of color.”

Ideology

Some district leaders believed that the EOS intervention in high school was not the right timing in terms of the K-12 spectrum. According to Justice, these leaders agreed that equity was an issue but felt that “high school is too late. We need to be intervening with kids further upstream in the pipeline...getting them in middle school into honors classes and things like that so that they’re on a pathway to AP.” For Justice, such beliefs fit with a mindset that students “either have it or they don’t.” Instead, Justice tried to help them take the approach of: “Well, yeah, maybe there are some gaps that need to be filled in students’ academic skills. But there’s also a lot of resources and things that we should be doing differently, as a school system, to support those kids so that they can be enrolled and be successful.”

The most powerful tool for doing so was data from past partners demonstrating that they boosted access without pass rates declining. Justice explained, “There are things that you can do to give students extra study skills, support, or peer mentoring, or putting in place some teacher professional development to get teachers thinking about how to improve and differentiate their instruction for different kinds of students.” At the webinars, EOS featured district and school leaders from past partnerships, who had a tremendous impact. According to Llibre, they shared comments such as “I had teachers who thought it was too late for these students and then were

really successful. And here's how we changed our mindsets. And here's how we helped them teach these students. Here's what the results were in our specific school system."

NEXT STEPS

On April 28, 2015, EOS and its partners announced "[Lead Higher](#)," a \$100 million commitment to enroll 100,000 new low-income students and students of color in advanced academic classes over the next three years. Partners included the College Board, Google, the International Baccalaureate Organization, Jack Kent Cooke Foundation, and Tableau Software. Saaris explained that this meant a five-fold increase in the number of schools that fully reflected their diversity in AP and IB courses. He had an ambitious goal, planning to grow EOS by 50 percent for the upcoming academic year and then by another 40 percent in the subsequent year.

Saaris wanted to scale his organization in a way "that works for our team" while also ensuring that EOS would continue to be "good partners that schools feel they can implement with and trust to rise to the occasion." He was conducting a search for a president and COO because "leading a really ambitious and talented team as well as pursuing national partnerships, strategy, and fundraising ultimately is two jobs. So we're creating a structure where I can focus on the external pieces, the messaging, Lead Higher, the things that I am really good at." Saaris was thinking a lot about how to "take what we've learned and enable bigger players like the College Board, the International Baccalaureate Organization, and the Department of Education to create an even greater impact...so scaling the impact rather than [just] scaling the organization."

As EOS was getting national attention, it was also being approached about possible funding opportunities. Saaris reflected, "We are freed up in a unique way by having the significant majority of our funding through earned revenue which means it's not restricted so we can flexibly deploy it." He anticipated that earned revenue would account for approximately 75 percent of revenue for the 2015-2016 academic year. The ability to provide some sort of subsidy, however, appealed to districts and helped superintendents build internal support. According to Saaris, "The real challenge comes from the paradox that funders like to support models that are sustained on earned revenue (like ours), and districts like lots of philanthropic support to subsidize the cost of a service. Finding the optimal blend is difficult to do." Emphasizing that funders were interested in supporting initiatives that were self-sustaining, Saaris noted, "Ultimately, we have districts paying for much of the service, and this attracts funders who then want to help us improve what we're able to do for districts through R&D, [for example]." Saaris wondered how to potentially incorporate such funding and reconcile the apparent paradox at the same time.

Saaris was also pondering how to leverage the EOS regional approach. Because getting the attention of districts was heavily dependent on relationships, Justice was sending partnership directors back to districts that did not sign contracts the previous year. The idea was to show these districts what exactly their neighbors were doing and the progress that they were already making. Saaris opined, "We'd really be in good shape [if we can do that] because we could build on existing regions, not be widely dispersed all over the country, and be able to engage our partnership directors. We would really be able to tackle these next stages of growth with quality."

Exhibit 1
Number of Missing Students Due to Participation Gaps

	AP	IB	Total
Low-Income	467,496	19,715	487,211
Black	89,025	7,932	96,957
Hispanic	54,623	5,376	59,999
American Indian	3,301	171	3,472
Total	614,445	33,194	647,639

Note: Low-income numbers include students from all races, while the remaining Black, Hispanic, and American Indian students are from families that are not low-income.

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Source: Christina Theokas, Reid Saaris, "Finding America's Missing AP and IB Students," The Education Trust and Equal Opportunity Schools, June 2013, <http://1k9g11yevnfp2lpq1dhrqe17.wpengine.netdna-cdn.com/wp-content/uploads/2013/10/Missing-Students-two-pager.pdf> (April 20, 2015).

Exhibit 2
Application Process and Timeline (Approximate)

Step	Time Line
Educational Leadership Conversation	fall/winter
Data Submission	winter
Optional Webinars	winter
Letter of Intent (LOI)	spring
Memorandum of Understanding (MOU)	spring

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Source: Equal Opportunity Schools.

[Exhibit 3](#)
Educational Leadership Conversation Invitation

Dear Superintendent XX,

I'm writing to invite District X to a **Google-hosted invite-only education leadership luncheon** on DATE in LOCATION.

Google, our largest funder, is convening a group of STATE districts identified through our Ed Trust research as significantly outperforming peer-schools in Advanced Placement and International Baccalaureate programs, and as having the unique opportunity to serve substantially more low-income students and students-of-color in those courses. Our organization, Equal Opportunity Schools, is a national nonprofit with a mission to ensure that all students have access to challenging high school courses. You can [read more about our work here](#) and in our recently co-authored paper with the Education Trust.

In our partnerships with 142 schools spanning 11 states, we've found education leaders excited to close the achievement gap by building on what's working best in their schools. This lunch will be an opportunity to hear from national experts and discuss with colleagues ways to close the achievement gap through a focus on equity and success in college-aligned coursework. In addition, joining the conversation will qualify your district's schools to apply to the national *AP/IB Equity & Excellence Project* we're undertaking with support from Google and researchers from the Education Innovation Laboratory at Harvard University. Selected applicants will receive technical assistance and possible grant support for closing the achievement gap by building on what's already working best in their schools.

District X was specifically identified for this Project because of the success it has achieved in serving students at highest academic levels in K12. In our research with the Education Trust, we identified the opportunity to build on this success by serving at least an additional **## low-income students and students-of-color** in AP and IB success by fall of 2016 in A, B and C High Schools.

Please RSVP to reserve a spot for you or one of your deputies. We look forward to hearing back from you.

Sincerely,

Luke Justice
Senior Director, Strategic Initiatives
Equal Opportunity Schools, Google Global Impact Awardee
[312-343-1992](tel:312-343-1992)

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Source: Equal Opportunity Schools.

Exhibit 4 Sample Student Insight Card

The Student Insight Card provides a multiple-measures approach for informing the critically important conversations that help students recognize their greater potential. Student Insights can be generated for every student in your building, ensuring that each one is seen and understood for all of the assets they possess. Additionally, these multiple-measures are used to generate school-wide indices of students who are most likely to benefit from an AP or IB course, helping school staff more effectively implement equity-driven course enrollment strategies.

STUDENT INSIGHT CARD
2014-2015

Alejandra C Diaz

11th Grader, ABC High School (ABCCHS)



(On Outreach List)

Education Goal Advanced degree (master's, doctorate, or other)

Career Interest Nursing or oncology doctor

Trusted Adults Samuel Brown
Michelle Sanchez

Study Skills Support Jonathan Rogers
Christina D. Turner

Staff Advocates 🍌🍌🍌🍌

Subject Interest Science

GPA 2.83

Indicators of AP Readiness

Willing to take AP

Demonstrated Assets:

- Academic Strategies
- Community Leadership
- Grit

AP Access Barriers

No adult encouragement

Hasn't enrolled in AP because:

- I don't think I can be successful/get a good grade
- I am worried it might hurt my GPA
- I don't know any teachers who teach AP

Test Scores

PLAN Math	17	Max: 32
PLAN Science	17 ☆	32
PLAN Reading	21 ☆	32
PLAN English	17	32

☆ = AP Comparable

Alejandra D's Comments

Max: Getting good grades and learning is my first priority, if i get a bad grade I talk to my teacher and try to get my grade up.

Would like the school to know: That neither of my parents graduated from high school i would be the first one, so i really want to do good in school and take some AP classes.

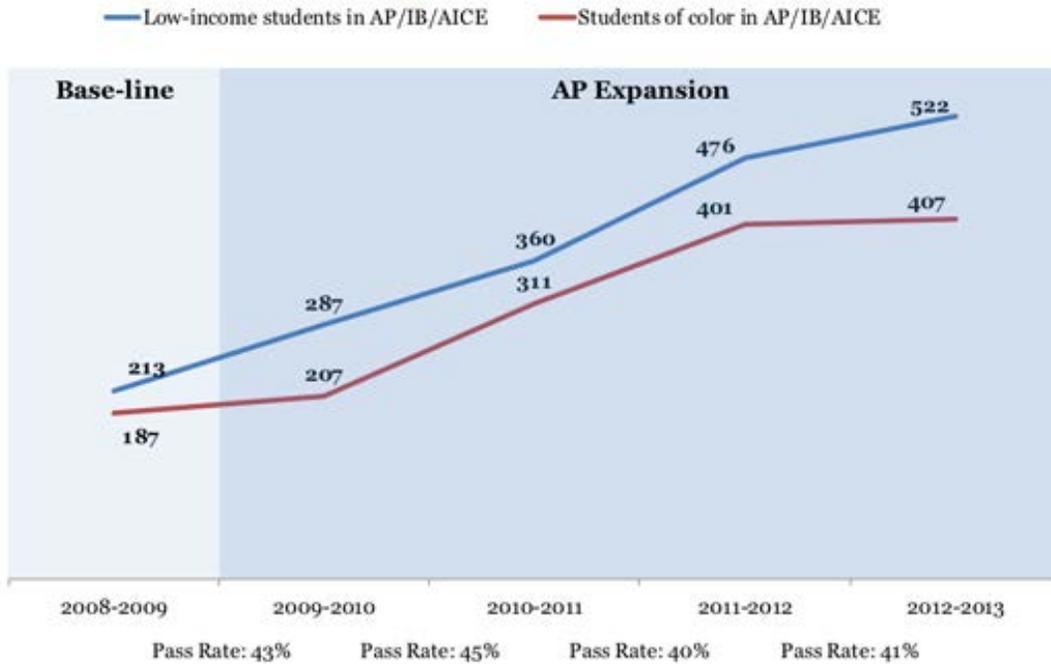
[Return to case](#)

Source: Equal Opportunity Schools.

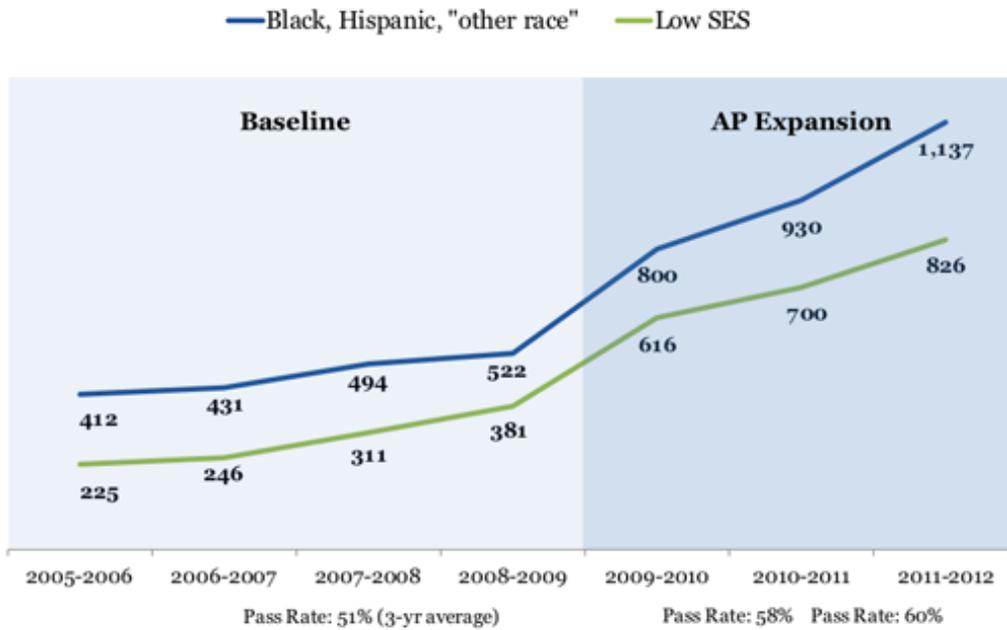
Exhibit 5

Results from EOS Partner Districts

Federal Way School District
AP Access Expansion and Success Data



San Jose Unified School District
AP Access Expansion and Success Data



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Exhibit 6

Source: Equal Opportunity Schools.

Developing Internal Support Profile: Glenbard District #87 Illinois

Jeff Feucht, Ed.D., Assistant Superintendent for Educational Services, believed that partnering with EOS would help his district achieve its priorities. The board had adopted 14 goals, 10 of which were about student achievement and included specific achievement metrics. “Most of those goals we cannot achieve unless we do a better job with our minority students and low-income students. [EOS was] focusing on the minority student achievement gap, and specifically giving them access to AP courses, which we place a priority on.” Feucht’s conclusion was, “We do a good job with two thirds of our kids but that remaining third, we are not going to meet these board goals unless we make major gains with them.”

Beliefs

According to Feucht, “we have core convictions from the school board level down around this issue.” The board had adopted the following beliefs on September 9, 2013:

- All students should enroll in a course sequence that prepares them for college, the global workforce, and personal success.
- Each student should be challenged to ‘level up’ to an honors or AP course in an area of interest.
- We are committed to closing the achievement gaps with all of our students hiring staff that is reflective of our student body’s diversity.

Challenges

1. Glenbard #87 had already done a considerable amount of work around equity, which presented unique challenges in developing internal support for partnering with EOS:

We had done so much work already to level up low income and minority students into honors and AP courses, it was a board goal, it was a board belief, and we’d made amazing gains in data. That makes us attractive as a partner. But because people have done so much work, put in so much sweat equity already, they [wondered], “[Is EOS] really going to find kids that we haven’t already found? And are the few more kids that they can find that we haven’t found yet worth \$29,000? Or can you just give me that \$29,000 to pay for professional development and resources for my teachers who are already working really hard with this broad range of kids we’ve found for our classes?”

Response: Feucht highlighted the fact that Glenbard #87 had been selected by EOS to partner due to the significant gains that the district had already made. “It’s a big honor that they want to partner with us.” He had learned from past work on minority student achievement that “people get really defensive if you just say ‘Hey, you have no African-American kids in calculus’ or ‘You only have two Hispanic kids in AP physics.’” Instead, Feucht acknowledged the gains his district had made and pointed out that it was still far from proportional. He referenced the EOS benchmark citing that less than one percent of high schools nationwide had proportional

representation with low income and minority students in AP courses and flipped this metric on its head to demonstrate the number of kids in AP courses that were middle class or affluent Caucasian. “And then, I would say, ‘Why couldn’t low income white kids be in AP classes at that same rate, given the same support?’ And then, ‘Why couldn’t African-American kids, both low income and middle and affluent kids be in at the same rate?’ When you pose it like that, people understood what their mission was, and that it was possible that we might still have students that we were missing.

2. Some board members were dubious about bringing in an outside organization. “There’s suspicion by boards when outside companies say, ‘Hey, we have a solution to do something that your district’s already been working really hard on for many years.’ People were skeptical about ‘This fancy organization from California having the best ideas, and they’re going to tell us what the best ideas are.’” [Feucht paraphrasing the sentiment, not a quote of Board members].

Response: Staff and board members conducted an Internet search on EOS and found nothing nefarious about the organization. Instead, they were impressed with the results that EOS had achieved and the organizations with which it collaborated.

3. At \$116,000 (\$29,000 per school multiplied by four schools), the EOS partnership posed a significant financial commitment. Feucht explained, “We have an \$143,000,000 budget, so it doesn’t sound like a lot for that size of a budget but almost all of that \$130,000,000 is consumed by teacher salaries, operating expenses, and capital improvements.” He oversaw a portion of the budget for educational services, which included all teaching and learning, special education, instructional technology, and English Language Learners (ELL), “but there aren’t extra funds built into this budget just to do ‘neat’ projects. So, to spend \$120,000 on something that sounds like a neat project is too much.”

Response: Partnering with EOS was not a “neat project.” The board had set an extraordinary goal and to meet it, the district needed to take extraordinary steps. Feucht focused on how collaborating with EOS would support the goal:

We have a really audacious board goal that by 2017, 60 percent of our students will take and achieve a three or higher on an AP test before they graduate. [Considering] our demographics and historical trends, that’s probably not going to happen unless we do something extraordinary. That is how I present it to the board: “You set this extraordinary goal. We have to do something extraordinary if you really want to achieve it.”

Status

The Glenbard #87 board approved the EOS application on June 22nd, 2015.

Source: This profile was developed by case author based on a phone interview conducted with Jeff Feucht, Ed.D., Assistant Superintendent for Educational Services, May 22, 2015.