UNIVERSITY OF CALIFORNIA SAN DIEGO

A National Analysis of the Establishment, Design, and Politicization of P–12 District Equity Director Roles

A dissertation submitted in partial satisfaction of the requirements for the degree of Doctor of Philosophy

in

Education

by

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The Dissertation of Andrew Matschiner is approved, and it is acceptable in quality and form for publication on microfilm and electronically.

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ABSTRACT OF THE DISSERTATION

A National Analysis of the Establishment, Design, and Politicization of P–12 District Equity Director Roles

By

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Doctor of Philosophy in Education

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In an era in U.S. public education characterized by the rise of students of Color as the numeric majority in U.S. schools and national attention to racial inequality, P–12 school districts have increasingly created new roles tasked with leading diversity, equity, and inclusion-focused work: district equity directors (EDs). Scholarship addressing central office staff generally remains underexplored, while research on district EDs is especially limited. Using a three-article dissertation format, this dissertation examines recent (a) ED role establishment, (b) ED role design, and (c) ED work and role politicization over the 2020–2022 school years amid national

efforts to restrict district equity work. Articles are based on a qualitative research design using interviews, surveys, and document analysis with over 70 EDs across 29 states and all nine U.S. census divisions. Using theory on social activism, equity-focused labor in organizations, role design, and political contention, findings contribute to the first national analysis of recently exploding ED roles. In Chapter 2, I examine when and why ED role establishment occurred locally, finding nearly 90% ED role growth between 2019 and 2022 among EDs in this study with nearly 40% of the largest 550 U.S. school districts having established such a role as of fall 2021. I further document how internal influence from district employees, intermediate pressure from community groups, parents, and students, and external coercion from state and national organizations led to ED role establishment locally. In Chapter 3, I analyze DEI leader role design trends, including features supporting and constraining role impact. I find roles are most often tasked with addressing "equity," designed as central office "director" level roles, and held by Black leaders and women of Color leaders, with 70% of EDs surveyed serving as the inaugural ED in their district. In Chapter 4, I examine how nationally-coordinated anti-equity organizing targeting district equity work led to district equity "shutdown" enacted by new conservative school board majorities, district leaders, EDs, and educators. I explore three forms of district equity shutdown: censoring equity-focused communication and language, eliminating district equity-focused programming or personnel, and restricting books and learning resources. Further, I find over 90% of EDs reported experiencing some form of the national movement to restrict learning about race, gender, and sexuality in their district; 40% of EDs reported at least one form of district equity shutdown; and nearly 25% of EDs reported experiences of personal intimidation.

CHAPTER ONE: INTRODUCTION

This dissertation analyzes the establishment, design, and work of U.S. P–12 district "equity director" (ED) roles. Federal education policy pressure, the rise of students of Color as the numeric majority in P–12 schools, and broader cultural pressure following summer 2020 continue to bring attention to racial inequality and anti-Black violence in U.S. school districts. Districts have responded in different ways: increasing professional development addressing race and racism, creating equity statements and policies, forming equity task forces, releasing equity reports or "scorecards," and appointing district equity directors (EDs). As this research demonstrates, nearly 40% of the largest 550 U.S. districts now have an ED role (see Chapter 2).

District commitments to "equity work" and the establishment of ED roles build on prior, federally-mandated work providing protections and supports for students with disabilities and linguistically diverse students. The ascendance of an *equity* paradigm in P–12 education and other public and non-profit institutions signals something beyond an *equality* paradigm. Minow (2021), providing one perspective on the recent "turn to 'equity'" in P–12 education, argued, "Rejecting identical resources and identical instruction as insufficient to meet the different needs of different students, education advocates stress that 'equity' calls for something different than the same treatment for all that they associate with 'equality'" (p. 174). So while district ED roles and central office staff-level attention to racial equity are "new" in many districts, efforts to better support minoritized students through work addressing pedagogy, discipline, course placement, Special Education placement, and grading, among others, and research on such efforts are hardly new (see e.g., Ladson-Billings, 1994; Lewis & Diamond, 2015; Oakes, 1985). ED roles specifically represent new, specialized roles with dedicated DEI expertise charged with system-wide impact while demonstrating increased district commitment to addressing racial and

other forms of inequality; yet ironically, EDs are often a single individual appointed to catalyze district-wide equity improvement.

Equity director roles today provide a valuable subject of study for multiple reasons. Equity director roles have rapidly expanded across the country in recent years; as shown in Chapter 3, 60% of EDs surveyed reported their district established an ED role during the 2018-2022 school years. EDs themselves also are asked to embody broader "equity" paradigms increasingly common and foundational to districts (e.g., "equity" as a pillar in district strategic plans), positioning these employees to drive district-wide diversity, equity, and improvement (DEI) improvement (Irby et al., 2021; Irby et al., 2022). Relatedly, ED roles and the work they lead are particularly under attack nationally by a network of conservative organizations, lawmakers, and media efforts seeking to restrict learning addressing race, gender, and sexuality (López et al., 2021; Pollock et al., 2022). More broadly, research on ED roles offers one way of examining how public institutions take up "equity" paradigms, how leaders potentially seek to institutionalize "equity" paradigms within organizations, and how public leaders navigate reactionary pushback to race-conscious "equity" efforts.

Statement of the Problem

Ten years ago, ED roles existed across very few districts—most often in large districts serving a majority of students of Color. Based on data explored in this dissertation, ED roles grew steadily over the 2012–2018 school years. As EDs surveyed indicated, ED role establishment accelerated over the 2018–2020 school years before peaking in the 2020–2021 school year following summer 2020 racial justice protests. Such roles were most often established as mid-level central office "director" roles and overwhelmingly tasked with advancing "equity" across districts.

Given the recent advent of ED roles, research tells us little about these roles. An emergent literature base explores ED role configurations, role vulnerabilities, and role activity (Irby et al., 2022; Ishimaru et al., 2022; Meyer et al., 2022). Yet each example of existing research used limited purposive and network samples with fewer than 15 EDs (i.e., non-national samples with limited role and district diversity) and collected data prior to national attention to racial inequality and rapid role proliferation throughout the 2020-2022 school years specifically. This dissertation thus contributes to the first national portrait of ED roles, addressing foundational questions related to why districts establish ED roles (Chapter 2), how districts design ED roles (Chapter 3), and how EDs and other district leaders navigated a spike in pushback to district equity work over the 2020-2022 school years (Chapter 4).

Overview of Research

Research questions, organized by chapter, are provided and followed by an overview of the dissertation methods. Each chapter provides more detail contextualizing research questions and specific methods and methodological choices. Table 1.1 summarizes the research questions and data collection methods.

Table 1.1
Alignment of Research Questions and Data Collection

Research Question	Data Collection Methods
Chapter 2 on ED Role Establishment Why are U.S. school districts increasingly establishing ED roles and how common are such roles? Why, according to EDs, were ED roles established locally, and with what envisioned impact?	Interviews Document Analysis
Chapter 3 on ED Role Design Across a nationally diverse sample of P–12 districts, how are districts designing ED roles? Who holds such roles and what role characteristics are most common, and to what extent are roles designed in ways that support district-wide DEI impact?	Surveys Interviews
Chapter 4 on ED Work and Role Politicization How are P–12 district leaders responding to current, nationally coordinated local opposition to district equity work, with what consequences for existing equity effort? According to EDs specifically, how, if at all, did reactive, anti-equity contention drive instances of district equity-related "shutdown" locally over the 2020-2022 school years?	Interviews Document Analysis

I conducted a qualitative study using, primarily, a systematic sample drawn from EDs working in all U.S. districts serving 15,000 or more students, and secondarily, convenience and snowball sampling methods to supplement data collection by including willing EDs working in districts serving less than 15,000 students. As detailed in Chapter 2, I built my sample around EDs in larger U.S. districts based on prior work (Greene & Paul, 2021) demonstrating that larger districts are more likely to establish ED roles. I collected data through website review to locate EDs, then ED interviews and surveys, and finally, document analysis when specific documents, articles, or other sources were mentioned by EDs in interviews.

In total, data was collected from over 70 EDs across 29 states and all nine U.S. census divisions between March 2021 and October 2022. Two interviews were conducted with as many EDs as possible throughout the 2020–2021 and 2021–2022 school years; surveys were administered between interviews in order to probe survey responses during the second interview. I collected and analyzed all data for each chapter. I wish to acknowledge Dr. Pollock's support in particular with Chapter 4 given her leadership on prior, related work (Pollock et al., 2022) and its influence on my thinking and analysis throughout Chapter 4.

This dissertation draws on theory from a range of disciplines to comprehensively analyze ED roles. Chapter 2 uses management theory on how organizations respond to social activism to explore ED role establishment. Chapter 3 uses theory on role design to explore ED role design features, supports, and constraints. Chapter 4 uses sociological theory on political contention to study national, state, and local actors' "reactive contention" against increasing district DEI attention. Each chapter also reviews relevant literature in more detail. Chapter 2 reviews the limited literature on ED role establishment; Chapter 3 reviews the literature on ED role design; and Chapter 4 reviews existing literature on the relationship between local politics and ED work.

Positionality

This dissertation brings together scholarly interest and personal experience. As a researcher, this project is a next step in my own prior work exploring leadership for equity: work examining the importance of leaders' reflective interrogation of their positionality (Puente et al., 2023), work exploring school and district-level efforts to further racial equity (Matschiner, 2022; Pollock & Matschiner, 2022), and work analyzing EDs' experiences of the national "conflict campaign" aiming to restrict teaching and school/district efforts addressing race (Pollock et al., 2022).

Personally, I first encountered a district ED and their work as a teacher in Baltimore County Schools through the work of Dr. Lisa Williams and the Baltimore County Office of Equity and Cultural Proficiency. Dr. Williams' work pushed me to examine my beliefs about teaching and learning further in the context of teaching in a predominantly Black school and later center racial equity in my instructional coaching with new teachers. Throughout my time as a doctoral student, I noticed how such roles and offices were proliferating nationally while research on central office staff and EDs remained limited. I thus decided, with much guidance from the committee, to craft a dissertation examining such roles. I am grateful to have learned from these district leaders and am proud to offer findings that I hope make a timely contribution to research and practice. I believe this work offers insight that is relevant across multiple fields and hope it will support efforts to more intentionally design ED roles and increase support and sustainability for the leaders that hold such roles.

Finally, my worldview is indelibly shaped by the ways I experience the world as a white male from an upper-middle-class background. I am committed to research addressing how educational leaders attempt to redress local manifestations of white supremacy and other systems of domination. Through this project specifically, I attempted to center the experiences of the leaders of Color and Black leaders, often women, who frequently hold these roles. I am committed to reciprocal relationships with EDs through co-presenting research findings with EDs at upcoming conferences (i.e., UCEA in 2023 and AERA in 2024) and supporting EDs and their work through convening virtual learning sessions connecting EDs across the country.

Key Terms Used Throughout the Dissertation

I use two common terms throughout this dissertation: "equity directors" (or EDs) and "district racial equity work." While there is some variety in role rank and titles across districts

nationally (e.g., chief diversity officer, coordinator for equity and access), I use the term "equity director" to refer to P–12 district DEI leaders because it is the most commonly used title for these roles (see Chapter 3). Almost 80% of role titles among EDs interviewed invoked "equity" while nearly 50% of roles were designed as "director"-level roles (i.e., a higher percentage than any other role rank; see Chapter 3).

Among the multiple forms of social and economic inequality often referenced in "equity" work, this dissertation focuses primarily on education efforts related to addressing racism and racial inequality. I use the phrase "district racial equity work" to refer to a wide range of activity and policy efforts from EDs and others to attempt to address racialized opportunity patterns and inferior treatment harming students of Color across districts.

I centrally focus on race, racism, and racial inequality in this dissertation for four reasons. First, prior research on district equity leaders points to the centrality of race and racism in EDs' work (e.g., Irby et al., 2022). Second, racialized district opportunity patterns, as explored in Chapter 2, often contributed to the establishment of ED roles. Third, EDs themselves shared that the most significant aspect of their overall DEI work focused on supporting students of Color and addressing racism and racial inequality. Finally, district racial equity work is of specific import following summer 2020 protests against anti-Black racism and subsequent anti-"critical race theory" restriction efforts (see Chapter 4). As further explored across dissertation chapters, issues of gender and language are also central to ED work. For example, many EDs identified as female amid predominantly male district leadership contexts, and EDs reported supporting multilingual learners and related programming in many districts.

In a dissertation focused on efforts to address racial inequality, it is necessary to note the "period effects" at play since the May 25th, 2020 murder of George Floyd. Lewis-Beck et al.

(2011) summarized, “The impact of living at a certain historical time on variables or relationships among variables, ignoring age, is called a period effect or historical effect” (p. 813). The EDs quoted here themselves demonstrate how global attention to anti-Black violence and policing following George Floyd’s murder, as well as national pushback to teaching and training addressing race and racism, clearly shape this particular moment’s societal attention and district prioritization of efforts to address racial inequality. This dissertation is thus a study of ED directors *now* in the current moment.

Situating ED Roles Amid Shifting Central Office Functions

Foreshadowing the rise of ED roles, conceptions about the role of district central offices have shifted considerably over the last thirty years. Traditionally expected to perform a small set of administrative services (e.g., payroll), district offices now provide a range of instructional functions (e.g., mentorship for new teachers and principals; Honig, 2013). National education policy also has shifted central office functions through compliance and accountability-based pressure. The Educate America Act of 1994, the No Child Left Behind Act of 2001, and the Every Student Succeeds Act of 2015 articulated increased academic goals for student subgroups, data reporting requirements (e.g., disaggregated discipline data), and consequences for districts failing to achieve progress on student outcome measures or track and report data. The Every Student Succeeds Act of 2015, for example, addresses academic goals as well as student discipline and school climate outcomes. District central offices have shifted priorities, reconfigured district office infrastructure, and added new functions in order to meet such measures of academic growth as well as address “gaps” in academic outcomes in response to such policy pressure (Honig et al., 2010). Datnow et al. (2005) summarized, “The role of the

district in educational improvement is vital, and districts are taking an increased role in directing school improvement" (p. 448).

Many central offices have reoriented their work to support specific outcomes including addressing inequalities across racial and ethnic student subgroups. District offices continue to respond in different ways in an attempt to reach these goals, meet requirements to collect and share data, and avoid sanctions, including, for example, creating central office positions dedicated to "continuous improvement" aligned with increasing academic achievement. Rorrer et al. (2008), reviewing the role of districts in reform, find districts played four primary reform roles: "(a) providing instructional leadership, (b) reorienting the organization, (c) establishing policy coherence, and (d) maintaining an equity focus" (p. 314). The role and work charge of EDs, and sometimes associated district "equity departments" (see Chapter 3), represent one way districts are attempting to pursue such "an equity focus."

Thus, in response to federal policy pressure as well as increasing attention to various forms of inequality nationally, districts have come to use the term *equity* to organize work addressing gaps in student outcomes (e.g., racialized achievement, discipline, and course enrollment patterns). District leaders also began to dedicate central office positions to "equity work" as early as the late 1990s in response to local incidents of racism and national corrective action, with an increasing number of districts establishing ED roles and equity offices following the murders of Trayvon Martin in 2011 and Michael Brown in 2014, the rise of the Black Lives Matter movement beginning in 2013, newly-emboldened racism in the wake of the election of Donald Trump in 2016, and finally, in the aftermath of the murder of George Floyd and national protests in 2020.

Bridging Educational Change Literature with Research on Racial Inequality

Researchers in education have long studied educational change processes using a variety of frameworks and units of analysis ranging from a single school to entire countries. Scholars use concepts such as change, reform, restructuring, and improvement to conceive of efforts to address particular student outcomes. Researchers have used frameworks from "capacity building" (e.g., Spillane & Thompson, 1997) to "improvement science" (e.g., Bryk et al., 2015), among others, to describe such efforts. Relevant to this dissertation, researchers specifically analyze the significance of contextual and political factors in school improvement efforts, with researchers drawing attention to "the power of contexts" (Chapman, 2013) and local "zones of mediation" (Oakes et al., 1997; Oakes et al., 1998; Renée et al., 2010) to explore the normative and political factors expanding and constraining improvement possibilities.

Empirical work explicitly bridging research on district improvement and racial inequality in schools has historically been limited. Datnow (2013) argued, "We need more dialogue between educational change researchers and those interested in social justice" (p. 65), while Oakes et al. (1998) called attention to, "How a neutral change literature falls short" (p. 953)—how educational change literature sometimes fails to interrogate questions of power and racial inequality. More recently, scholars have explicitly bridged education change literature with research on racial justice (e.g., Datnow et al., 2022; Diem et al., 2022), capacity building literature with research on racial equity in schools (e.g., Irby, 2021; Ishimaru & Galloway, 2014), and organizational theory with research on racial inequality (e.g., Ray, 2019). Thus, this dissertation adds to growing scholarship at the nexus of racial equity, organizational improvement, and educational leadership.

Remaining Chapters

Chapter 2 on ED role establishment is approximately 14,000 words and will be submitted for publication as a journal article. Chapter 3 on ED role design is approximately 13,000 words and will be submitted for publication as a journal article. Chapter 4 on ED work amid anti-equity organizing over the 2020–2022 school years is approximately 12,000 words and will be submitted for publication as a journal article. Finally, Chapter 5 discusses findings from across the dissertation in the context of foundational literature before exploring directions for future research. For ease of access, references are provided at the end of each chapter.

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CHAPTER TWO: A NATIONAL ANALYSIS OF P–12 EQUITY DIRECTOR ROLE ESTABLISHMENT

Abstract

P–12 district "equity director" (ED) roles have grown rapidly over the last ten years. Drawing on interviews and surveys with over 70 EDs across 29 states, this article explores *why*, according to EDs, such roles were established locally. This research finds a gradual increase in such roles prior to 2018 and dramatic role growth between 2018 and 2022, with 60% of EDs surveyed reporting their district created an ED role during the 2018–2022 school years. Demonstrating the national proliferation of ED roles, this research located roles in nearly 40% of the largest U.S. districts. Scholarship on social activism was used to analyze how insider influence from district educators, intermediate pressure from community coalitions, parents, and students, and external coercion from state and federal education departments and civil rights agencies spurred ED role establishment. Specific to insider activism, long legacies of racialized-gendered equity labor from Black educators and women of color often played a critical role in ED role establishment. The benefits and tensions of ED role establishment are considered.

Keywords: equity directors, educational leadership, leadership for equity, racial equity, social activism, school district improvement

Historically, many P–12 school districts have responded to legal decisions and federal legislation such as *Brown v. Board of Education* and the *Individuals with Disabilities in Education Act* by creating specialized plans, personnel, and departments tasked with supporting equal opportunity for students. Desegregation managers, directors of multilingual learning, and district special education departments, among others, have historically been established to support the incorporation of equal opportunity public policy mandates within school districts (see e.g., Elfers & Stritikus, 2013; Rorrer et al., 2008; Skiba et al., 2008). A recent P–12 district role tasked with equalizing opportunity has emerged over the last ten years: district equity director (ED) roles. Such roles have been growing over the last decade (Irby et al., 2021), and as this research finds, nearly 40% of the largest 550 U.S. districts had established an ED role as of fall 2021. As this research explores, ED roles are single roles tapped to lead work across districts, and personally and publicly are asked to embody many districts' increasing commitment to equity. Reflecting the most common role rank and title, I refer to these positions as "equity director" (ED) roles throughout this paper.

Equity directors are a recent organizational development as districts take steps to realize commitments to equity and antiracism and face both internal and external pressure to better support Black, Latinx, Asian American, Pacific Islander, and Indigenous students and educators while building the racial literacy of white students and educators.[1] As this research demonstrates, summer 2020 protests further accelerated ED role establishment which began to rapidly increase in the 2018–2019 school year. Through statements, board policies, and the establishment of

[1] In prior work with co-authors (Pollock et al., 2022), we referred to district equity leaders as "equity officers." This nomenclature reflects higher education DEI roles (see Williams & Wade-Golden, 2013), but as addressed previously and explored more elsewhere (Matschiner, in progress; see Chapter 3), such roles are more commonly established as "equity director" roles across P–12 districts.

"equity director" (ED) roles, many P–12 district leaders took steps to address racial inequality during the 2020-21 school year specifically.

As roles rapidly spread post-summer 2020 in part through leaders mimicking roles in other districts (Lewis et al., 2023), this research set forth to explore this role's emergence, using interviews and surveys with EDs from across the country. Building on emerging scholarship on EDs (Irby et al., 2022a; Ishimaru et al., 2022; Meyer et al., 2022), this study provides the first examination of ED role establishment that is both national in scope and contextualized through many EDs' experiences in local district contexts. This paper focuses on exploring role establishment from EDs' own perspectives. To explore ED *role establishment*, I asked the following: *Why are U.S. school districts increasingly establishing ED roles and how common are such roles*? *Why, according to EDs, were ED roles established locally, and with what envisioned impact*? With data collected throughout the 2020–2021 and 2021–2022 school years, this analysis adds to scholarship documenting how district leaders responded to racial justice protests followed by anti-"critical race theory" attacks on teaching about race, and subsequently, gender and sexuality (López et al., 2021; Pollock et al., 2022).

For this paper, I used interview data from EDs to analyze ED role establishment processes and survey data to examine when roles were established. I attempted to include as many EDs as possible across the country. As explored more in the Methods section, following a prior report (Greene & Paul, 2021), I primarily built this sample through systematic national outreach across districts serving 15,000 students or more (n = 550 using 2019-2020 National Center for Education Statistics [NCES] district data).[2] Analyzing district websites and

[2] Findings on the prevalence of ED roles nationally (i.e., nearly 40% among the largest 550 U.S. districts) build on prior analysis from non-peer-reviewed work published by the Heritage Foundation (Greene & Paul, 2021). Researchers (Fierros, 2022; Rice-Boothe & Marshall, 2022) have criticized this plainly partisan report, raising questions about methodological choices and unsubstantiated conclusions. The report, which categorically states that "CDOs do not and cannot promote equality in student outcomes" (p. 11), is part of the larger attack on district efforts

organizational charts across these 550 districts, I located 213 DEI leader roles as of fall 2021. I subsequently reached out to all such leaders and ultimately interviewed 60 of these leaders. Secondarily, I used web search convenience sampling and snowball sampling to solicit additional EDs. In total, I interviewed 72 EDs between March 2021 and June 2022.

In interviews, EDs reported a wide range of actors, local factors, and forms of influence that led to the creation of ED roles in their district. Thus, drawing on Briscoe and Gupta's (2016) insider-outsider activism framework, I analyze how ED role establishment responded to internal influence, intermediate pressure, and external coercion. I also analyze how EDs raised questions about the ultimate impact of ED roles, referring to role establishment as potentially limited "checkbox work."

Among multiple forms of social and economic inequality addressed by "equity" work, this article focuses on racism and racial inequality in relation to ED roles for four reasons. First, prior research on district equity leaders points to the centrality of race and racism in EDs' work (Irby et al., 2022a; Ishimaru et al., 2022; Meyer et al., 2022). Second, as shown here, racialized district opportunity patterns and related state and federal corrective action often directly contributed to the establishment of ED roles. Third, EDs themselves, in interviews, shared that often the largest part of their overall diversity, equity, and inclusion (DEI) work focused on supporting students of Color and addressing racism and racial inequality. Finally, district racial equity work is particularly salient in many districts following summer 2020 protests against anti-Black racism and subsequent anti-"critical race theory" restrictions. Findings also indicate that issues of gender and patriarchy are central to the ED role and ED role establishment: as explored later, years of advocacy by women of Color and Black women specifically modeled and

to equalize educational opportunities for students of Color. I acknowledge the report here as I similarly analyzed ED role establishment nationally using more recent National Center for Education Statistics data.

pushed districts to institutionalize equity commitments. As explored elsewhere (Matschiner, in progress; see Chapter 3), 52% of EDs surveyed identified as women of Color and 34% identified as Black women. Further, EDs often referenced the predominantly white, male, and race-evasive district contexts that have long dismissed and deprioritized racial equity work (see Matschiner, in progress; see Chapter 3), requiring action that led to ED role establishment. To account for ED experiences of racialized-gendered marginalization in district contexts, I use Lerma et al.'s (2020) concepts of "racialized equity labor" and "cycles of racialized equity labor" throughout this article.

ED role establishment is one of many ways districts may pursue racial equity. Scholarship on other efforts, such as equity audits (Green, 2017; Skrla et al., 2004), school-based equity teams (Galloway & Ishimaru, 2020; Villavicencio et al., 2022), district equity policies, and professional development addressing racial equity (Kohli et al., 2017; Matschiner, 2022) further contextualizes the range of district equity work explored by scholars. Accordingly, through this article, I differentiate between general pressure on districts to prioritize and resource equity commitments and pressure toward ED role establishment specifically. This research finds that ED role establishment is a common, and perhaps the most common, form of district "equity attention" in the current moment.

To situate findings, I first review existing literature related to ED role establishment. I then contextualize the creation of ED roles across school districts with an interdisciplinary lens using scholarship from multiple fields. Next, I detail data collection and analysis methods. Finally, I present findings followed by conclusions and areas for future research.

Research on P–12 Equity Leadership Role Establishment

Equity directors in P–12 settings follow similar roles in higher education (Williams & Wade-Golden, 2013) and corporate settings (Shi et al., 2018). Education, sociology, and management scholars continue to examine how organizations respond to forms of inequality and pressure to address such inequality (e.g., Briscoe & Gupta, 2016; Dobbin, 2009; Kraus et al., 2022). Among other issues, scholars have written about how organizations further inequality through everyday practices (e.g., Acker, 2006; Picower & Mayorga, 2015; Ray, 2019; Tomaskovic-Devey & Avent-Holt, 2019; Wooten & Couloute, 2017) and how organizational leaders respond to "diversity crises" and attempt to resolve such crises (e.g., James & Wooten, 2017; McCluney et al., 2020; Williams, 2008). Scholarship documenting efforts to redress inequality are important within organizations specifically because, as Acker (2006) argued, "much societal inequality originates in such organizations" and because "work organizations are also the target for many attempts to alter patterns of inequality" (p. 441).

Antecedent P–12 roles such as district "multicultural education coordinator" roles suggest that ED roles are not entirely "new." District DEI leadership positions build on legacies of district DEI work including multicultural education coordinators, Title I and Title IX coordinators, migrant education directors, special education directors, family engagement directors, English language learner directors (now often conceived of in terms of "multilingual learners" or "linguistic diversity"), and educators' unrecognized DEI labor (see e.g., Ishimaru et al., 2022; Lerma et al., 2020).

Scholarship analyzing P-12 ED roles is expanding, even as it remains limited to date. Scholarship analyzing ED roles is currently comprised of a series of recent articles and a report based on the experiences of 13 EDs (Irby et al., 2021; Irby et al., 2022a; Ishimaru et al., 2022),

an examination of the role based on 10 EDs (Meyer et al., 2022), an exploration of directors in Minnesota (Mattheis, 2017), and two articles considering how to support and assess ED impact (Lewis et al., 2023; Rice-Boothe & Marshall, 2022). Other information comes from a Heritage Foundation report that negatively positions ED roles (Greene & Paul, 2021).

Researchers often briefly mention general reasons for ED role establishment, but no study to date has focused on why ED roles are created or studied local role creation processes across a range of district contexts. Mattheis (2017), studying district "directors of diversity and equity" across Minnesota—with data collected between 2009 and 2013—explored how director roles were created, at least in part, to lead the "implementation of school integration policy" (p. 522) in the context of state-level desegregation efforts. More recently, Irby et al. (2022a)—with data collected between 2017 and 2019—argued districts are creating equity leadership roles "in response to persistent race-based and other inequities and spurred by mounting pressure from local and national education and political activist organizations" (p. 417) in order to "support the design and implementation of district strategies to improve the social, emotional, and academic experiences and outcomes of students whom districts traditionally underserve" (p. 418). Finally, Rice-Boothe and Marshall (2022) suggested, "Many K-12 districts have hired equity officers to ensure equity is foundational to every part of the school system and that it has a place in every conversation and every decision" (p. 19).

Such summaries provide helpful context, yet general overviews and limited ED samples provide an incomplete understanding of why such roles are established and the role of local actors and contexts. Little is known about the specific actors (e.g., community members, superintendents, etc.) who drove role creation processes locally; the specific concerns (e.g., racialized discipline patterns harming Black students) driving local role establishment; and the

range of tactics (e.g., internal advocacy from staff, state corrective action) used to build pressure locally in support of ED role creation.

Attention to ED role establishment adds to limited scholarship on central office staff, often key actors increasingly supporting school-level improvement and equity efforts (Honig, 2006). Such attention builds on findings demonstrating some positive impacts of creating DEI leadership in organizations, specifically corporations (Dobbin et al., 2007; Dobbin & Kalev, 2015; Kalev et al., 2006). Dobbin et al. (2007) summarized, "Our analyses show that making a person or a committee responsible for diversity is very effective…Firms that put in diversity managers see increases [in manager-level representation] for all groups of women, and for black men" (p. 26). This article is thus informed by the promising potential of ED roles in districts, yet mindful of research demonstrating the challenges of racial equity work within organizations (see e.g., Ahmed, 2006; Lewis et al., 2023; Tichavakunda, 2021; Turner, 2020). Research on EDs and ED work is important in this specific moment as ED roles (and other DEI leadership roles) are targeted by anti-equity organizing (López et al., 2021; Pollock et al., 2022) and as states like Florida and Texas now consider legislation prohibiting DEI offices and staff on college campuses.

Further, attention to ED role-creation processes provides the field with a deeper understanding of the localized and temporal characteristics of the racial politics of district DEI work and ED role establishment. This work follows Scott's (2011) call for educational scholarship engaging social movements and activism that "more comprehensively maps the racial politics of advocacy" (p. 593). In the process, this article contributes to research bridging educational change literature and research addressing racism and racial inequality in P–12 systems, as EDs are tasked with leading for equity across educational systems (see e.g., Datnow

et al., 2022; Ishimaru & Galloway, 2021; Irby, 2021; Welton et al., 2018). Having overviewed existing literature, the following section details the research questions and theoretical perspectives used to analyze role establishment processes.

Research Question and Theoretical Approach

I asked the following question core to this paper: *Why are U.S. school districts increasingly establishing ED roles and how common are such roles*? *Why, according to EDs, were ED roles established locally, and with what envisioned impact*? As analysis began, I noted that in interviews EDs were naming a range of internal and external advocacy foundational to the proliferation of ED roles. Interviewees often suggested that ED roles were created because local people inside and outside districts demanded that districts address experiences of racism (e.g., offensive, demeaning, and exclusionary experiences endured by students of Color) and persistent racialized opportunity patterns (e.g., student achievement, discipline, and course enrollment patterns). For example, reflecting on this pressure, a Black female ED working in a Northeastern suburban district, summarized, "I think there were lots of folks that were calling for this [racial equity] work and pushing on the executive board [and] superintendent saying that this is what needs to happen. So it was internally and externally." I thus leveraged Briscoe and Gupta's (2016) insider-outsider social activism framework to explore activism "in and around organizations" (p. 641) including "insider," "intermediate," and "outsider" activists. Borrowing from Briscoe and Gupta (2016), I explore the actors, forces, and tactics that EDs shared led to ED role creation.

Briscoe and Gupta (2016) conceptualized social activism as "instances in which individuals or groups of individuals who lack full access to institutionalized channels of influence engage in collective action to remedy a perceived social problem, or to promote or

counter changes to the existing social order" (p. 647). Considering the range of actors engaged in social activism, Briscoe and Gupta (2016) elaborated,

> We envision a spectrum of social activist types ranging from non-members or 'outsiders' at one end (such as independent social movement organizations (SMOs) to full members or 'insiders' at the other end (such as employee groups), with partial members (such as shareholders and students) falling somewhere in-between. (p. 673)

While this framework was initially developed by management scholars synthesizing research on social activism in corporate settings, I use the framework to examine school districts as one form of organization responding to social activism. As this analysis demonstrates, district EDs and other staff represent "insiders" often advocating for equity-focused change; community groups, parents, and students represent "intermediate" actors; and state department of education staff and federal Office for Civil Rights staff (as one example) represent "outsider" activists. I document how internal actors modeled and influenced district leaders while intermediate and external actors pressured district leaders to prioritize and resource racial-equity commitments. Throughout, I consider "influence tactics" and "influence pathways" used by actors to push for greater district attention to forms of inequality and for ED role establishment specifically (i.e., "the diverse mechanisms and pathways through which activists influence their organizational targets"; Briscoe & Gupta, 2016, p. 3).

The activism of EDs themselves, often through long personal histories serving students of Color and other marginalized students in their district prior to the establishment of an ED role, proved particularly significant across this research. To analyze such labor and advocacy from these leaders, often Black leaders and women of Color, I use Lerma et al.'s (2020) concept of "racialized equity labor." Racialized equity labor describes the legacies of work EDs engaged in for years, and in some cases decades, advocating for increased prioritization and resources addressing racist treatment and racially disparate opportunity patterns across their district before

becoming EDs themselves. Lerma et al. (2020) detailed racialized equity labor as "the often uncompensated efforts of people of color to address systematic racism and racial marginalization within organizations" (p. 286). They elaborated on such labor in the context of higher education, writing,

> Faculty and staff of color who are not hired for this purpose [official "diversity work"] are also often expected to engage in labor that creates the perception of diversity (Matthew 2016). Many are also motivated to push for substantial change, due to a deep commitment to 'lift as we climb' (Moore 2017). As a consequence, women of color, in particular, experience 'identity taxation,' as their marginalized social identities may lead to high levels of service commitments not experienced by their White peers. (p. 288)

Such racialized equity labor is core to understanding the years of activism, often unrecognized and uncompensated, from Black leaders (62% of EDs surveyed), women of Color (52% of EDs surveyed), and Black women (34% of EDs surveyed) specifically that led to establishing ED roles. Further, Lerma et al. (2020) detailed a four-part "cycle of racialized labor appropriation" through which "leadership appropriates racialized equity labor, and in doing so converts it into a diluted diversity initiative" (p. 287). I return to this cycle throughout the article to consider how such cycles may play out in districts with regard to ED role establishment.

Methods and Data Analysis

This research used a qualitative design to explore ED role establishment. Analysis primarily drew on interviews, after website review across a strategic sampling of districts most likely to have EDs to locate districts with ED roles (see Greene & Paul, 2021); emails to such districts' EDs; and finally, over 100 hours of interview data with 72 EDs working across 29 states and all nine U.S. census regions. I sought to interview as many EDs nationally as possible to inform this study. I sought EDs for this sample primarily by reviewing district websites and organizational charts in all U.S. districts serving 15,000 or more students based on NCES Table

215.10 data in fall 2021. I did this because a prior report (Greene & Paul, 2021) indicated larger districts are more likely to have established ED roles. I located EDs in 213 (i.e., nearly 40%) of the 550 U.S. districts serving 15,000 or more students and reached out to all of them personally to see if they might be interested in participating in this research. Secondarily, I used Google search results (i.e., searches for publicly identifiable EDs using "district equity director" and "district equity officer" keyword searches) and snowball sampling methods (i.e., asking EDs interviewed if they knew other EDs who might want to participate in the study) to locate EDs in districts serving fewer than 15,000 students. As ED roles are established in districts of all sizes, I supplemented national sampling across all districts serving 15,000 students or more with convenience and snowball methods to provide a more comprehensive understanding of ED role experiences.

Across all three sampling methods, I used web searches, analysis of district organizational charts and websites, and analysis of local online news sources to determine whether district DEI-focused leader roles existed in a district. I included all roles that invoked "equity," "diversity," and/or "inclusion" in the role title, with most titles ultimately included in this study combining multiple concepts. I also included role titles that invoked "equity," "diversity," or "inclusion" in combination with other concepts such as roles addressing "equity and innovation" or "equity and access." I did not include roles that did not invoke equity, diversity, or inclusion, except in the very rare case that role titles clearly suggested a focus on supporting minoritized students such as "minority achievement officer." I included district roles regardless of role rank (e.g., coordinator, director, assistant superintendent).

I attempted to contact all EDs by email or through Linkedin when an email was not publicly available. Among EDs ultimately participating in the study, I located 60 EDs based on

the primary sampling method drawn from outreach across districts serving 15,000 students or more. I located 11 additional EDs using web searches and one additional ED based on snowball sampling, with these 12 willing EDs coming from districts serving less than 15,000 students. Appendix B details sampling methods in more depth.

This research then predominantly represents the perspectives of EDs working in districts serving more than 15,000 students (i.e., 60 of the 213 such EDs identified nationally, over 25% of such EDs) plus experiences drawn from EDs working in smaller districts. This sample is nationally diverse in many ways but is not nationally representative of all U.S. districts, and I do not purport to compare small versus large districts in this study.

Across districts where I interviewed EDs, enrollments ranged from less than 3,000 students to over 450,000 students with a median enrollment of approximately 28,000 students. Per U.S. census regions, 35 EDs worked in districts in Western states, 16 in Southern states, 16 in Midwestern states, and 5 in Northeastern states. Per NCES, 43 EDs worked in "city" districts while 29 EDs worked in "suburb" districts; no EDs interviewed worked in "town" or "rural" districts. Over 60% of EDs in the sample identified as Black; over 10% identified as Latinx; and over 10% identified as multiracial (i.e., Latinx and Indigenous). Approximately five percent identified as Pacific Islander while approximately five percent identified as white. One ED identified as Asian American, one ED identified as Native, and one ED identified as Arab. Appendix A anonymously details each of the 72 districts where EDs worked with student enrollment, U.S. region, NCES district locale, and the year of ED role establishment; I notate EDs by region versus state because I promised such anonymity.

Research methods included two 45-60 minute semi-structured interviews and a survey administered using Qualtrics (Fontana & Frey, 2005; Merriam & Tisdell, 2016). In total, I

conducted two interviews with 62 EDs and only one interview with the remaining 10 EDs due to ED schedules and role transitions. Interviews focused on ED role establishment, equity leadership activity, role affordances and constraints, role collaboration, and the politics of equity work locally. In interviews, I specifically followed up on role establishment stories and related details. Interviews were scheduled with an average of four to five months between interviews; the majority of interviews were conducted between February 2022 and June 2022. Interviews took place over Zoom or phone and were recorded using Zoom or Google Voice. Recordings were then downloaded and transcribed. The survey, which I gave EDs between interviews to allow for follow-up questions in the second interview, asked about racial/ethnic and gender identity, ED role establishment year, who EDs report to in their district, ED role location within central offices, and ED experiences of role support. Appendix C provides the interview protocol while Appendix D provides the survey. Analysis in this article almost exclusively draws on interview data, with survey data used only to summarize EDs' self-identified racial/ethnic and gender identities and ED role establishment year. Survey methods and associated data are detailed in a complementary article on role design (Matschiner, in progress; see Chapter 3). I also infrequently used document analysis methods to analyze relevant sources when EDs sent me documents or local news coverage directly related to ED role establishment.

Given the lack of research on ED role establishment, I engaged in open coding using three rounds of inductive coding and analytic memos (Saldana, 2013). In the first round, I identified themes throughout the data related to ED role creation, including "community pressure" and "legal pressure." In the second round of coding, I examined relevant actors such as EDs themselves, superintendents, local community coalitions, and lawyers, developing codes such as "ED prior advocacy," "local advocacy group/coalition," and "state-level department."

Prior to the third round of coding, I assessed the relevance of potential theoretical frameworks. I examined research on racialized organizations (McCambly & Colyvas, 2022; Ray, 2019), institutional legitimacy (Deephouse et al., 2017; Dowling & Pfeffer, 1975), and social activism and organizations (Biscoe & Gupta, 2016; Zald et al., 2005), ultimately selecting Briscoe and Gupta's (2016) insider-outsider activism framework to contextualize ED role establishment. Finally, I conducted a third round of coding using this framework to continue to assess its fit and limitations. In the process, I continued to engage with relevant literature in order to contextualize the data and ED experiences, ultimately selecting Lerma et al.'s (2020) concept of racialized equity labor to attend to the experiences and years of activism now-current EDs engaged in prior to role establishment.

Finally, when presenting ED examples and quotes throughout the Findings section, I use EDs' self-identified racial and gender identity from survey data, region of the country based on the U.S. Census Bureau classification (i.e., West, Midwest, South, and Northeast), and district locale (e.g., city, suburb) based on NCES classification (see Appendix A for complete details). Based on these data collection and analysis methods, I now present ED role establishment findings.

Findings: District ED Role Establishment

Using Briscoe and Gupta's (2016) insider-outsider activism framework, I examine the actors, forces, and tactics driving the establishment of ED roles throughout this section. Before analyzing such activism, I briefly contextualize ED role establishment with data on *when* districts established such roles.

An equal amount (30%) of EDs reported their district created an ED role during the 2018–2020 school years and the 2020–2022 school years. These findings indicate that rapid ED

role proliferation began prior to summer 2020 racial justice protests, spurred by various forces explored throughout the findings section: internal advocacy from educators, pressure from community coalitions, state accountability pressure, federal corrective action, lawsuits filed against district, and local incidents of racism.

Still, 2020–2021 was a particularly accelerated year for ED role growth with the highest percentage of EDs reporting their district created an ED role in school year 2020-2021 specifically. See Figure 1 for ED role establishment details. Accordingly, over 70% of EDs were the first to hold an ED role in their district while roughly 10% of leaders served as an ED in another district prior to their current ED role.

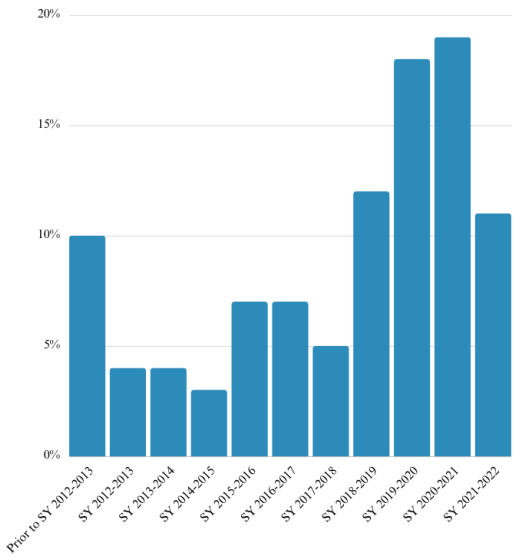

Figure 1
ED Role Establishment Year

"I Want You to Do That for the District...We Need This for the District": Equity Directors and Superintendents as Insider Activists

I begin with an analysis of two fundamental "insider" activists EDs described as central to the proliferation of equity director roles: current EDs themselves, and superintendents. I first explore current EDs' prior work and document how their racialized equity labor (i.e., "the often uncompensated efforts of people of color to address systematic racism and racial marginalization within organizations;" Lerma et al., 2020, p. 286) as insider activists often proved critical to the ultimate establishment of district ED roles. Following Lerma et al. (2020), I find EDs often engaged in unrecognized (i.e., work outside their formal role) and often uncompensated (i.e., unpaid) labor while using persuasion-based, collaborative influence grounded in long-standing relationships and trust with district leaders, including superintendents. For many EDs, the establishment of a district ED role was the culmination of years of unrecognized and uncompensated equity work carried out as teachers, counselors, school administrators, and central office staff across overwhelmingly white and male district spaces (see also Grogan & Nash, 2021; Ishimaru et al., 2022).

This research demonstrates how EDs often leveraged their experience and relationships to influence district leaders to create ED roles through (a) equitable example and equity expertise, (b) exercising their positional power in prior roles, and (c) relationships with superintendents. EDs most often used "persuasive/influence tactics" that were "geared toward convincing decision-makers about the merits of activist claims" through lobbying and "issue selling behavior" (Briscoe & Gupta, 2016, p. 675). Both before becoming an ED and as an ED, many women of Color EDs also shared isolating experiences marked by racial-gender

"organizational double jeopardy" (Ishimaru et al., 2022) as the "first" in schools and decision-making rooms where they drew attention to manifestations of racial inequality.

Equity Directors Influencing through Equitable Example and Equity Expertise

Current EDs reported that they influenced districts to prioritize and resource equity commitments through their own equitable example and their expertise in leading equity work, leading to ED roles. Many EDs interviewed had worked for years in the same district where they became an ED, as teachers, administrators, and central office staff. Over time they garnered reputations for their equitable example in various roles and through their overall equity expertise. EDs that did not work in the district where they would become an ED often had long-standing relationships with district leadership through consulting work or local equity-focused workshops and conferences.

Influencing through equitable example and equity expertise began at the school level for many EDs, including through increased support for students of Color and through raising questions and objections about outcomes for students of Color. A Black male ED in a Midwestern suburb recalled assuming an unofficial equity leadership role in his school, following the police killing of Mike Brown in 2014. He commented,

> So when it [police killed Mike Brown] happened, there was a lot of protests, a lot of eruption, a lot of issues within the school racially. I was the only Black male teacher in the school of about 1,300 students. And as things started to kind of escalate, I had a good relationship with the Black students, and a lot of white students as well, because I taught and coached multiple sports…So I kinda was tapped by administration to help calm a lot of the tension that was around and to kind of be the voice of our, especially our Black students during that time…I was doing a lot of things that probably would've come from the administrative level, but [as the] only Black male teacher, [having] certain relationships with kids, there was nobody else to really go to.

His example illustrates the support for Black students and other students of Color and forms of racialized equity labor many directors reported contributing long before they became

EDs—often unrecognized and uncompensated labor that should have "come from the administrative level." Following such unofficial equity labor and leadership, he became the first ED in his district in the 2020–2021 school year.

Many current EDs recalled leading by equitable example and demonstrating equity expertise as school administrators specifically. A Black male ED in a Southern suburb reflected on his time as a principal, recalling, "I did most of the [equity] work by asking questions," including, "Do you know all the kids that are running for SGA [student government association], do they represent all our kids?" In time, he shared, "Our [school] achievement surpassed even that of schools in wealthier areas…and so I think that's why I'm in the position [as ED beginning in 2010-2011] I am." Another ED, a Black female in a Western city (who became the first ED in her district in school year 2020–2021), similarly described her prior work in terms of raising questions related to the treatment of Black girls in the middle school where she was an assistant principal. She explained, "I went to my boss and told them we really need to work on equity and disparate outcomes and disproportionality…It's putting some of our Black girls out of school for weeks at a time." She drew attention to the fact that many out-of-school suspensions that disproportionately impacted Black girls were the result of minor, subjective interactions deemed inappropriate by predominantly white teachers.

Another Black female ED working in a Western city explained how she led by example as the first Black high school principal in her district. Like many current EDs, her work supporting students of Color at the school level caught the attention of her superintendent. She explained, "In 2017, [superintendent name], the current superintendent calls me to her office and she says, 'You have made some significant changes and have implemented systems at two of our most challenging high schools. I want you to do that for the district...we need this for the

district.'" Another Black female ED in a Midwestern city summarized how leading on equity for many years in a central office student service role influenced her superintendent to create a position formalizing her equity efforts: "And then five years ago, our deputy superintendent was retiring and the superintendent said, 'I don't think I'm going to fill that position with another deputy title, but I think with all of the work that you've done, we're gonna create a Chief Equity Officer position.'"

Equity Directors Influencing through Limited Positional Power

Multiple EDs detailed dual positions where they had served simultaneously as principals or assistant superintendents and led district equity work before their district established an ED role and hired them for the role. Current EDs used often school-level positional power inherent in their roles as district administrators with formal authority to call attention to and often lead district equity work. A Black female ED in a Midwestern city summarized, "I was also the person leading our equity efforts for about five years. And so I had kind of a dual role [as both a school principal and] working with the entire district and providing workshops and…supports."

Another Black woman in a Northeastern suburb with a long history in her district reflected, "I've been taking little incremental steps towards a role like this [ED role] since I started teaching 16 years ago"—a role her district established and appointed her to in the 2020–2021 school year. She reflected on using her positional power as an administrator, and typically the only person of Color in district spaces:

> I think my path is being, in most cases, the only person or one of very few people of Color in whatever school setting I was in and feeling like I was unofficially in some regards in a similar role [to an ED role], even though I was a classroom teacher or an assistant principal or principal. I found myself often in the role of advocating for equity in terms of students of Color, in terms of students from low-income backgrounds. So it was kind of always this informal role that I didn't realize I was serving, but always ended up serving.

A Latinx female ED in a Western city recalled how she used her positional power as a then associate superintendent for teaching and learning in her district to advance district equity work. She recounted, "So as an add-on to my position, I then pulled together a community-based group. We called it the 'equity task force' and started doing a lot of the equity efforts in addition to what my normal assigned duties were." Her positional power as an assistant superintendent helped convene and sustain the equity task force which led to advocacy with board members and the superintendent and the eventual creation of an "equity and access" assistant superintendent role during the 2019–2020 school year.

Finally, a Black female ED in a Western city, who was previously a counselor, described using her positional power on a district-wide committee to push the committee to revise a draft of a board resolution addressing equity and racism which ultimately led to the district hiring an ED. Characterizing initial drafts as vague and race-evasive, she recalled, "I thought for sure they were gonna kick me off…I kept being more vocal…I was coming from the position of a [district] parent and coming from the position of an employee." The district ultimately finalized a resolution and, in part due to her advocacy, "declared racism a public health crisis in our district." Her activism didn't end with the statement. She remembered saying, "Okay, this is great, but what's gonna happen? How are these things gonna get done?" Less than six months later, her district created a coordinator of diversity and equity position and hired her for the role.

Equity Directors Influencing Role Establishment through Relationships with Superintendents

Equity directors reported a final way that they influenced districts toward ED role establishment: personal relationships with superintendents. Current EDs shared that, in many

cases, years of district work produced trusting relationships with superintendents. An ED who identified as Black and multiracial and worked in a Northeastern suburb commented,

> I remember reflecting with our superintendent at the time saying, 'If we want to be real and true about this character work, we need to start to pay attention to student identity and race and equity issues because this character piece without…[addressing student] identity and [associated professional] development is kind of missing the mark. We can't be posters and banners.

Her insider activism relied on trust built over nearly 20 years in the district and a personal relationship with the superintendent, ultimately leading to her being appointed the inaugural ED in her district during school year 2020–2021. She continued, "So professional development started for administrators and I was an assistant principal leading a team of internal, self-motivated administrators to provide professional development to our peer administrators…we developed a task force internally and started on equity work." Even when support for district equity work "died out in a sense," she reported, "I was still saying, 'Well, we got to do something, we gotta do something,' and I think I'd just been beating that drum in advocating that we need a sustained effort—energy, resources, and so forth—towards equity work."

A Black female ED in a Western suburb had recently retired when she got a call from a superintendent who trusted her based on her prior P–12 leadership work. The ED recounted, "The superintendent of [district name] reached out to me and asked if I would consider assisting and being a part of the process of working with students, staff, and parents around the issues of equity in the district…So that's how I got involved, is just being part of the community for so long. And then the superintendent felt he could trust me in this [district equity] journey." Finally, a multiracial female in a Western city recalled how her work locally led the superintendent to ask her to work for the school district as the first ED in the district during the 2018–2019 school

year: “I was chatting with our new superintendent and he was like, ‘You should come work over here.’ And I was like, ‘Well, I’ll consult.’ And then he asked me to stay on full-time. And so I’ve been doing that.”

The Role of Superintendents in ED Role Establishment

In addition to the activism of current EDs, superintendents with equity-focused visions often prioritized establishing ED roles. Despite research drawing attention to a lack of racial and gender diversity in the superintendency (Grogan & Nash, 2021; White, 2023), some superintendents offered crucial support for ED roles and often expedited the creation of such roles. Equity directors identified leadership transitions when districts hired new superintendents as a common period when districts established ED roles. A Black woman ED in a Western city shared, “I would say that the work actually started with our now [Black male] superintendent, Dr. [Last Name].” She recalled, “When he interviewed with us he talked a lot about the work of equity. And as soon as he got here he implemented a strategic plan that has in it the word *equity*.” As a result of the superintendent’s equity commitments and embedding equity in the district strategic plan, an equity policy and ED position soon followed. A Black male ED in a Western city similarly shared, “When we hired her [new superintendent], part of the hiring process, she constantly talked about [equity], so…it was always sort of forefront…that was her mindset coming into the district. I mean that was her focus.” In her second year in the district, this superintendent established an ED role for the district. Finally, a Native male ED in a Western city recalled the superintendent saying to him in 2016, “We don’t really know where to start, but we know that this is important. The diversity is changing. We need to go a different direction. Can you help us?”

The establishment of ED roles in former or nearby districts led some superintendents to mimic such roles in their current district. Equity directors reported that superintendents examined other districts and talked to other superintendents before ultimately creating an ED role in their district. A Latina director in a Western suburb outlined a process where her superintendent "started researching and talking to superintendents locally and nationally" in 2014:

> One of the things that the superintendent did once he was appointed…he started researching and talking to superintendents locally and nationally, and trying to understand the why behind their structures—areas that have been effective, not effective, [and] why. To him, it was really important that he communicated that things that mattered to him needed to report directly to him, and so that was his why and purpose for creating this [ED] position [during the 2014–2015 school year] that had never existed in [Name] School District.

Further, a Black male ED in a Western city recalled a local process based on a neighboring district establishing an ED role during the 2020–2021 school year. He commented, "So when [neighboring district] had an equity coordinator position, all of a sudden that's like, 'Well, [district name] needs to have an equity coordinator position—what's going on? And so they tried to mimic the role off of what [neighboring district] was doing." Such ED role mimetic isomorphism in part contextualizes the rapid expansion of district equity leadership roles over the last ten years, beginning in 2018 and further accelerating following summer 2020 protests against anti-Black racism (see Lewis et al., 2023).

Recognizing and Compensating Racialized Equity Labor

To explore the racialized-gendered nature of insider activism analyzed throughout this section, I return to Lerma et al's (2020) concept of "racialized equity labor." ED experiences demonstrate the significance of "the often uncompensated efforts of people of color to address systematic racism and racial marginalization within organizations" (Lerma et al., 2020, p. 286) and the direct relationship between these efforts and the creation of district-level ED roles.

Superintendents' decisions to create such roles formalized and compensated work long important and carried out primarily by educators of Color. Consistent with the first element of Lerma et al.'s (2020) broader "cycle of racialized labor appropriation" (p. 287), current EDs (and other educators of Color) had long called attention to "problems in the racial environment of their organizations" (i.e., the first element in the cycle; p. 287) while working to address such problems at the school and district level. Furthermore, according to EDs, school and district leaders often were not leading on (or even talking about) issues of racial equity; as one put it, "I was doing a lot of things that probably would've come from the administrative level." Other times EDs reported that senior district leaders responded to issues of racial equity by "blocking efforts and/or denying issues" (i.e., the second element of Lerma et al.'s [2020] cycle; p. 287). Thus, while current EDs influenced district leaders to establish ED roles, efforts to influence district leaders to prioritize racial equity and establish an ED role were not always welcomed without resistance.

ED insider activism alone frequently contributed to ED role establishment, but ED insider activism by itself often did not lead to the establishment of ED roles without pressure from intermediate or outsider activists. As documented in the following sections, often a combination of internal, intermediate, and external activism pressured districts to establish ED roles among other equity-focused actions—the third element of the "racialized equity labor" cycle or the process through which "external and/or internal pressures force introspection and push leaders to resolve an organizational threat" (Lerma et al., 2020, p. 287). I return to consider the fourth and final step in the cycle of racialized equity labor—the appropriation of equity labor—in the Discussion section.

In addition to internal advocacy from current EDs and superintendents, this research finds local pressure stemming from anti-Black violence and racialized district achievement and discipline patterns also contributed to ED role establishment. In the next section, I explore the role of community members, parents, and students as critical "intermediate" activists (i.e., "partial or temporary members of [the] target organization"; Briscoe & Gupta, 2016, p. 681) who pushed district leaders to establish ED roles among other equity-focused actions.

"They Grew Impatient, Rightfully So, About the [District] Inaction": Community Members, Parents, and Students as Intermediate Activists

Equity directors recounted how parents, community groups, and students advocated for addressing changing student demographics in many districts and racialized district opportunity patterns harming students of Color, specifically Black students. I explore how these intermediate activists leveraged both collaborative and confrontational influence pathways toward district equity prioritization, often accelerated or only possible following local pressure in the wake of high-profile instances of racism. I document instances of activism from "intermediate" actors, frequently in the wake of local incidents of racism or national pressure following summer 2020 racial justice protests, and find intermediate activists often engaged in more confrontational forms of activism. Compared with influence and persuasion tactics often used by "insider" EDs, intermediate and outsider activists more often used "disruptive/protest tactics" that were "focused on creating material or reputational costs for organizations" (Briscoe & Gupta, 2016, p. 675) in order to compel long-resistant districts to establish ED roles and take other equity-focused actions. Less often, such activism was collaborative as district leaders invited parents, community members, and students to take part in equity-oriented committees and district groups. Finally, EDs noted how while ED role establishment was long overdue, local

incidents of racism and/or summer 2020 protest pressure often provided "an opening to step through"—a unique moment that led to ED role establishment in many districts.

EDs shared that racialized achievement and discipline patterns and demographic mismatch between students of Color and predominantly white educators drew community concern. EDs referred to "the community" and "our communities" and "our Black community" when detailing intermediate activist pressure. A Black female ED in a Northeastern suburb reflected,

> So [district name] has in the high eighties, about 85% people of color in the district [with Black students comprising the majority of district students]. So about 15% Latine…and then white is probably about 15% as well. Asian, I think, two [percent]. But it's a very diverse city. And so the curriculum didn't match. The teaching staff is the total opposite in the high eighties—White teachers, of course. I mean, the stats, mostly white females…80 something percent white. And so there was the community folks asking for this [new role] to address the needs of the students and look at equity and inclusion and celebrate the diversity that's in the city.

A Black male ED in a Southern suburb commented, "I think the community had been trying to get a diversity coordinator for quite some time and the previous superintendent just wasn't in line with that kind of vision," while a Latina in a Midwestern city summarized, "our communities have been the ones that have been pushing the district, coming to board meetings and coming to public comments.'" Another ED, a multiracial male in a Western suburb, summarized local efforts from Black community members pushing district leaders over many years amid multiple "race-oriented issues": "So they had developed as a district due to specifically some race, race-oriented issues, multiple race-oriented issues in the community…So there are other ranges [of equity issues], but I would say the central and primary concern has been raised in particular amongst our Black community."

Equity directors called attention to the role of specific community organizations, the majority of which had been advocating for greater equity prioritization from districts prior to

summer 2020. One ED, a Black female in a Midwestern city that established an ED role in 2018-2019, detailed,

> There were families, there was actually a family organization in [location] that's called JUSTICE [pseudonym]. It's a Black family organization and they were expressing their concerns to the superintendent, to the school board, and they grew impatient, rightfully so, about the inaction…There was lots of inaction there.

Another Black female ED in a Southern suburb added that a group called the Black Parents Association [pseudonym] had been "very critical of the work of the district" for years leading up to the establishment of her position during the 2018–2019 school year. Other directors noted how student activism, particularly following the murder of George Floyd, added pressure for district leaders to act. A Black woman ED in a Western suburb explained that student protests played a key role in moving her district to act and create an ED role. She contextualized the creation of the role in her district, reflecting, "I believe that every single district that has this equity position has done so to meet the needs of their individual communities." She continued, detailing how a student-led movement in the summer of 2020 pushed the district to act:

> People felt ill-equipped to address the concerns, real concerns of equity, because more students were involved in the protest. There was more media…students were at home. It was during the pandemic. So they [students] had more time to really reflect and organize. We saw this organizational movement that was grassroots really hit the community at that time.

The combination of internal influence and intermediate pressure often catalyzed ED role establishment—EDs spoke about the combination of internal influence and intermediate pressure in ED role establishment. Yet in other districts, external corrective action was instrumental and necessary for ED role establishment. Corrective action through state and federal agency intervention and lawsuits filed against districts forced long-negligent districts to establish ED roles and prioritize and resource equity commitments more broadly.

"You Need to Get Your Shit Together": State and Federal Agencies and Lawyers as Outsider Activists

Equity directors also identified outsider activism as a significant driver of ED role establishment, pointing to the role of state and federal agencies, often through confrontational tactics including investigations, corrective action plans, and lawsuits. Notably, investigations were used exclusively by outsider organizations such as state departments of education or the federal Department of Education's Office for Civil Rights while lawsuits were used by both outsider activists, and less frequently, intermediate activists. EDs specifically pointed to state departments of education, state departments of civil rights, Department of Justice investigations, Office for Civil Rights investigations, and lawsuits filed by community groups and the American Civil Liberties Union. As shared unprompted by EDs in interviews, at least six districts faced state corrective action, at least five districts faced federal corrective action, and at least four were involved in lawsuits regarding the lack of academic resources, opportunities, and/or achievement for students of Color. This section first explores corrective action from state agencies before addressing the role of federal agencies, investigations, and lawsuits in pressuring, and in some cases, legally requiring district action, including establishing ED roles.

Corrective Action from State Agencies

Equity directors pointed to state pressure emanating from (a) reviews by state departments of education; (b) state designations related to discipline (e.g., "significantly disproportionate" discipline patterns); and (c) combined pressure from state department of education and state department of civil rights officials. An ED in a Northeastern suburb (role established in the 2020–2021 school year) remembered, "We had our district review with the state and a common thread was equity—that there was a lot of work to do with regards to

equity." A Black female ED in a Midwestern city (in a role established in 2018–2019) explained how her district was "cited by the state" regarding "being significantly disproportionate, regarding student out-of-school suspensions, for Black African American males, particularly those who have an IEP [individualized education program]." Reflecting on just how disproportionate discipline rates had become in her district, she elaborated, "To be deemed as 'significantly disproportionate' is really high. They give people a lot of grace to mess up. So if you are actually cited, that means that there is a major problem there."

A Black female ED in a Western suburb similarly explained how discipline disparities noted by the state led to an ED role and shaped the focus of her role. She explained, "We have been identified as a district that disproportionately, and even significantly disproportionately, discipline, suspend, and expel African American students…So between that and then my equity work, which is starting at ground zero, that is my main position." A Black male ED in a Western suburb (in a role established in 2019-2020) added,

> So apparently they were given essentially what is a corrective action order from the [State] Department of Civil Rights. They underwent an audit that turned up some things that were not favorable in the light of the [State] Department of Civil Rights, combined with the Civil Rights Department of the [State] Department of Education…They were compelled to hire someone to begin to address those inequities.

In addition to state agencies, EDs also pointed to the role of federal agencies and lawsuits from national organizations in compelling districts to establish ED roles.

Lawsuits and Corrective Action from Federal Agencies

Directors further pointed to the role of outsider activism stemming from the Department of Justice, the Office for Civil Rights, and outside litigation filed by the American Civil Liberties Union. Given local histories of resistance to integration and long-standing racialized opportunity and outcome patterns, EDs pointed to both the legacies of past rulings and the role of more

recent rulings. A Black male ED in a Southern suburb recalled how the legacy of a lawsuit from the 1990s mandated district DEI infrastructure and paved the way for an ED role. He explained, "It was a lawsuit based on the post-desegregation order filed in the nineties that highlighted nine areas in which the district had institutional processes that contributed to negative outcomes based on your zip code, based on your citizenship status." As a result, the district was forced to examine access and equity questions such as "who had technology," "who had access to advanced placement courses," and "what was the discipline data for schools?" He shared, "It is an ongoing settlement in which they required a diversity committee." Thus, while the equity leadership role in this district was established years later during the 2014-2015 school year, the legal settlement mandated a district DEI commitment that remains today while the ED serves on that diversity committee and acts as a liaison between the district and concerned community members.

ABlack male ED in a Southern city discussed how a lawsuit filed by a parent group ultimately forced the district to prioritize DEI commitments and establish a district ED role in order to monitor progress and regularly share progress with community groups. The lawsuit was filed in the early 2000s, but a new agreement regarding district responsibility to address racialized achievement patterns was reached in 2017; as part of that new agreement, an ED role was created to lead district DEI work and liaison between the district and concerned parents. The parent group, Parents Demanding a Just Education for Black Students [PDJEBS; pseudonym], "filed a lawsuit against the district and that consists of six areas where there's a discrepancy between Black and non-Black students." These six areas included (a) graduation rates, (b) "overall student achievement," (c) "the opportunity to be placed into advanced courses," (d) "the disparity rate between the discipline[d] students—students being suspended and referrals to the

office," (e) the over-identification of exceptional behavior disorder students—we saw more Black males, especially being placed into Special Education classes," and (f) "minority hiring…there has been a decrease in the number of Black teachers being hired in [district name]." In order to address these issues and stay informed of district progress, the ED explained, "PDJEBS wanted to have someone at the table that could report out to them and therefore this [ED] position was created where I was a liaison between the district and the community." He continues to "report out to PDJEBS on behalf of the school district" regarding "where we are with the six goals."

Department of Justice and Office for Civil Rights investigations also catalyzed ED roles. A Black female ED in a Midwestern city remembered, "I went on maternity leave. I came back and they had been kind of talking about creating this position. And so really it [ED role creation] was in response, because we had a DOJ complaint going on, and they said, 'We really need to focus on this.'" A Black male ED in a Western city summarized, "My role came about before George Floyd and what happened there, and it was in response to the ACLU and OCR…some allegations from the ACLU and OCR about our treatment of our African American students in our district." He continued, "So the interim superintendent…appointed me and asked me to become the administrator of equity and [exact title redacted to preserve anonymity] to oversee this work in our district. I said, 'Yes,' and that's where the position was born."

A Black female ED in a Western city traced her role back to a 2007 OCR agreement. She explained that her role was created "because in 2007 we had a complaint filed against the district by a parent at an elementary school because their student was a multilingual learner, [and] was identified with a disability…[and] there were certain processes and policies not followed and

established." As a result, the district "came under an OCR, the Office for Civil Rights, contract [agreement]" that included establishing a role overseeing equity issues.

A Pacific Islander ED in a Western suburb commented, "We started out back in 1996 with a director of educational equity" because "the Office for Civil Rights was here looking at what we're doing as far as diversity awareness and diversity training, but more importantly, they were there because we were not meeting the needs of English language learners." Underscoring the pivotal role of superintendents in establishing equity leadership roles, she recalled, "When I started in [district name], it was a new district, new superintendent…And when he came into [district name] knowing that this was an Office for Civil Rights issue, he decided to be innovative and to create this equity department. And so it is having a lot of different elements together I think that created the synergy for this."

Such "synergy" echoes trends across this article where "outsider activism" in combination with internal and intermediate pressure led districts to act by establishing ED roles and through other equity-focused commitments. In some cases, ED roles were established not as a result of sustained community concerns, but only in combination with and after what one ED called, the "wake-up call" of corrective action for districts that are often "used to being celebrated":

> Our district is an affluent district that is often lauded and is used to being celebrated and used to being number one in all the good things, and to be one of two districts in the entire state cited as 'significantly disproportionate' in this area [racialized discipline patterns] was a major concern. It was a wake-up call for them. And this is coupled with hearing from the concerns from this same demographic community about their experiences. And so they're [district leaders] like, 'Wait, we need to do something about this.'

A Black male ED in a Midwestern suburb in an ED role established in 2019–2020 further discussed the relationship between district "altruism" and corrective action. As an outside hire,

he observed, “They seem to be very altruistic in wanting to get some things done in the district,” yet he concluded, “That altruism may be a byproduct of the first and foremost thing—the [State] Department of Civil Rights saying ‘You need to get your shit together.’” In sum, outsider activism in the form of state and federal corrective action was less common than pressure from insider and intermediate activists but proved a forceful “wake-up call” urging district leaders “to get your shit together” and “do something about this.”

Thus, many districts responded to insider, intermediate, and outsider pressure by establishing an ED role—signaling and ostensibly prioritizing commitments to better serving students of Color. Considering the role of external pressure and legally-mandated coercion in ED role establishment in many districts, EDs raised questions about the sincerity of district leaders’ equity commitments and the potential impact of ED roles. In a final discussion, I consider the tensions of ED role establishment as potentially limited “checkbox” work.

Equity Director Roles: Impactful Role or Illusory Symbol?

Findings illustrate how insider, intermediate, and outsider activists worked internally and built pressure externally to drive ED role establishment. Still, EDs expressed questions and skepticism about why roles were established and what led to role establishment given long histories of local activism and racially disparate outcomes (see Irby et al., 2023 regarding the role of local “interest convergence windows”). This research finds that previously-inactive district superintendents and boards, in some cases, only established ED roles following national or local incidents of racist violence or because they were compelled to by outside agencies or lawsuits despite long histories of local activism and calls to better support students of Color. Accordingly, EDs called attention to how such roles could serve the reputational self-interest of

districts without disrupting existing racial inequalities and changing the daily experiences of youth of Color—potentially representing limited "checklist" commitments to equity.

Several EDs referred literally to this establishment dynamic as "checkbox work" whereby they felt equity leadership roles were only created "to check a box" (i.e., take minimal proforma action to signal responsiveness to community concerns and commitment to racial equity) in response to external pressure. A Latinx male ED in a Midwestern suburb summarized, "Really I believe [the ED role] at the time [was created] to check a box." Another ED, a Pacific Islander woman in a Western suburb, added her analysis of the origins of the ED role in her district: "So it was a checkbox—'Yeah, we've got this, but what do we do with it now?" And a final ED, a Black male in a Western city, who argued ED roles are often created when a "superintendent gets some of the hot water," elaborated,

> Sometimes these roles appear because of an incident in the district. Sometimes something bad happens. A superintendent gets some of the hot water and the board and they say 'okay, we need to create this role.' And what I found…was what I called 'checkbox work,' you know, we're just checking the box.

EDs reflected on assessing district leaders' commitment to racial equity work in the ED interview process specifically. A Black male ED in a Northeastern suburb, reflecting on the ED interview process, recalled, "One of my top questions in my interview was, *why now?*...I wanted to know why was the work important at this time." He noted that district leaders responded by invoking "the death of George Floyd, [they] talked about the racial reckoning" and by mentioning the "need to have some different conversations here." In conclusion, he said, district leaders had summarized, "We wanted to turn a corner and start doing some work—catch up."

A Black female ED in a Western district described how common "we the people" rhetoric (i.e., reactionary and superficial district rhetoric affirming the value of diversity) can create the "illusion" that districts are in fact engaged in ongoing work to disrupt racialized opportunity

patterns. Reflecting on the difference between such superficial rhetoric and more substantial commitments in the context of deciding if she was going to accept the ED role, she shared,

> You know, the famous, 'we the people' speech that we all have heard and know, it just seems like in our society we get a lot of that. These grand speeches and these proclamations and resolutions and all these different things…for the appearance that there's going to be change. And that's what I meant…I'm not here for the appearance, because if that's what I'm here for then I'm out. I wanted action. I wanted to see something happening. I wanted people to be held accountable. I would much rather people be held accountable and systems be held accountable than we write all this down and it doesn't mean anything and it just gets shoved away until something happens, and then we pull it out and say, 'well, we did this back in blah, blah, blah.' So yeah, we are here for the equity and diversity work and inclusion work. But are we really? I didn't want the illusion of [district equity commitment].

Thus, in some districts, commitments to "catch up" and corresponding "grand speeches" potentially signified good-faith effort to serve students of Color better. However, some EDs responded skeptically by raising questions about the timing and sincerity of such commitments and speeches. Accordingly, commitments to "catch up" also likely signified a desire to "catch up" to local pressure for increased organizational DEI commitment while attempting to further the district's reputation as a district that supports students of Color.

Discussion

On the one hand, ED role establishment reflects the voices of educators and community members advocating for remedying long-disparate racialized opportunity patterns and finds support among existing literature. Equity director role establishment is supported by scholarship on organizational DEI-focused improvement (Dobbin et al., 2007; Dobbin & Kalev, 2015; Kalev et al, 2006). Dobbin et al. (2007) explained, "Management experts have long argued that if a firm wants to achieve a new goal, it must make someone responsible for that goal. To hire a diversity manager…is to make someone responsible" (p. 27). Research across hundreds of corporations over multiple decades demonstrated that establishing a DEI leadership role is an effective

organizational intervention associated with multiple positive benefits: "Efforts to establish responsibility for diversity lead to the broadest increases in managerial diversity. Moreover, organizations that establish responsibility [through DEI leaders and/or task forces] see better effects from diversity training and evaluations, networking, and mentoring" (Kalev et al., 2006, p. 589).

Yet as EDs themselves noted, *establishing* a district-level leadership role does not itself ensure broader organizational readiness, commitment, or systemic effort to address racial and other forms of inequality. In the context of higher education literature on "chief diversity officers," Williams and Wade-Golden (2013) argued that "success is…contingent on having suitable resources in a position's formal span of control" (p. 151) if chief diversity officer roles are to provide "more than symbolic leadership" (p. 151). ED roles thus may provide the appearance and illusion of organizational commitment to racial equity through their symbolic value (Lewis et al., 2023; Tichavakunda, 2021) while failing to provide appointed leaders with the resources and authority necessary to drive systemic change aligned with local equity concerns—a dynamic I explore elsewhere (Matschiner, in progress; see Chapter 3). With 60% of ED roles in this study recently established during the 2018–2022 school years, attention to issues of senior leaders' ongoing support for district equity work and ED role support and impact are particularly important.

ED role establishment intended to satisfy "checkbox work" in districts' reputational self-interest echoes recent research on symbolic equity commitments. Lerma et al.'s (2020) findings demonstrating "cycles of racialized equity labor" support ED skepticism about the potentially limited, symbolic impact of ED roles. Lerma et al. (2020) detailed, "When seeking to quell unrest, save face, protect reputation, or address accountability issues, leadership may draw

on racialized equity labor as a valuable resource and take credit for the labor of people of color" (p. 289). Districts then may "absorb the efforts of laborers, but not their goals" (p. 295), take credit for racialized equity labor and associated changes in ways that bolster districts' reputation, and "convert it [transformative equity labor and demands] into benign diversity work" (p. 300).

Recent scholarship supports skepticism about the tensions and limits of ED role establishment. Lewis et al. (2023) cautioned that the ED role specifically "runs the risk of becoming symbolic, only serving to signal or perform an organization's commitment to equity-oriented work without meaningfully attending to its structures, policies, or practices" (p. 5). Research on "Racial Symbols" (Tichavakunda, 2021; see Bell, 1992) further contextualizes the potential dilution of ED role impact: "Racial Symbols are policies, memorials, statements, or leaders, that have abstract or symbolic value, but do little to alter the structural condition and material realities of racially oppressed peoples" (p. 305). ED roles then may become "Racial Symbols" whereby roles seemingly reflect community demands and temporarily resolve district organizational legitimacy and/or diversity crises (see e.g., Deephouse et al., 2017; James & Wooten, 2006) while roles and leaders lack "suitable resources in a position's formal span of control" (Williams & Wade-Golden, 2013, p. 151) to drive district-wide impact. In contrast with limited, symbolic roles, Irby et al. (2022b) summarized findings on impactful ED roles, writing, "Supportive [ED] role configurations offer supervisory responsibility and authority, financial resources and budgetary discretion, influence on superintendent and board relations, and involvement with district professional development and instructional matters needed to fulfill the responsibilities of the job."

Finally, limited, symbolic roles serve to compound an already challenging and potentially isolating role given common experiences of racial-gender "organizational double jeopardy" (i.e.,

Ishimaru et al., 2022), identity taxation (Hirshfield & Joseph, 2012; Lerma et al., 2020), and racial battle fatigue (Smith et al., 2007) experienced by EDs of Color and women of Color EDs specifically. In many ways then, intentional ED role *design*, meaning how roles are conceived of and structured within districts, is crucial to creating impactful roles with adequate capacity and authority and to supporting the leaders of Color, often women, who hold ED roles. Accordingly, building on concerns related to ED role establishment, complementary research explores ED role design nationally (Matschiner, in progress; see Chapter 3).

Conclusion

As insider activists, EDs influenced district leaders to create ED roles through persuasive, collaborative tactics including themselves leading equity-focused programming and raising questions about racial equity issues specifically; through wielding their positional power to argue for greater district-wide prioritization of DEI work; and through personal relationships with superintendents. As previously quoted, EDs shared, "I saw the need," argued, "We really need to work on equity and disparate outcomes and disproportionality," and kept "beating that drum in advocating that we need a sustained effort—energy, resources, and so forth—towards equity work."

For their part, intermediate activists used both persuasive tactics such as testifying at school board meetings, and disruptive tactics such as student protests to argue that district leaders' vision, strategic priorities, and associated staffing should (a) be responsive to their input as intermediate members (e.g., parents, community members, and students) and (b) prioritize and resource DEI commitments in explicit and permanent ways. Local and national incidents of racism and anti-Black violence tragically added credibility to intermediate activists' claims, built

more pressure on district leaders to establish and resource DEI commitments, and offered, in the words of one ED, "an opening to step through" locally.

Finally, outsider activists used disruptive, confrontational tactics to challenge districts publicly and seek to legally compel districts to meet their obligations to students of Color and Black students specifically. Such tactics were framed around the argument that severely disparate student outcomes by race demonstrated that districts were not meeting their obligation to provide a quality public education for all students. As a result of confrontational legal pressure, districts were often served a legally-binding "wake-up call" and "compelled to hire someone to begin to address those inequities."

Future research might explore "how to configure equity director roles for impactful change-making" (Irby et al., 2022a, p. 449) by continuing to examine how districts design such roles, beginning to document the impacts of district equity leadership activity, and learning from "equity directors' agential actions" to shape ED roles "for greater influence and impact" (Irby et al., 2021, p. 441). Following Ishimaru et al. (2022), longitudinal studies of ED work are also necessary to examine how EDs resist the potential dilution of transformative racial equity commitments and drive district-wide equity improvement.

ED roles represent major new roles in districts serving millions of the nation's students and the realization of years of advocacy by educators and community members. Work on ED roles is timely and important for supporting the work of these increasingly common yet politically-targeted roles. Thus, in a moment when many EDs "are essentially building the plane as they fly it" (Rice-Boothe & Marshall, 2022, p. 20), researchers might continue to take up questions of ED role establishment in support of these valuable roles, the leaders who hold them, and more racially equitable schools.

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CHAPTER THREE: A NATIONAL PORTRAIT OF P–12 EQUITY DIRECTOR ROLES AND ROLE DESIGN

Abstract

Existing literature tells us relatively little about how district central office staff engage in equity-focused improvement, including roles specifically tasked with supporting equity-focused improvement work. Over the last ten years, P–12 districts have increasingly established district-level diversity, equity, and inclusion (DEI) leader roles, most often as "equity director" (ED) roles. Beyond creating roles, how are districts *designing* such roles? How do role design features support and constrain district-wide DEI impact? Drawing from interviews and a survey with over 70 district EDs, findings begin to provide a national portrait of ED roles and role design trends. Analysis demonstrates DEI leadership roles are most often designed as director-level roles tasked literally with addressing "equity"; held by Black leaders and women of Color; placed across a range of central office homes, including district DEI departments; and created with limited staff and precarious financial support. Despite the rank of roles increasing over time and EDs often serving on district cabinets, findings suggest district leaders might design ED roles with greater resources and authority to support systemic equity improvement.

Keywords: equity directors, equity leadership, role design, central offices, equity capacity

Many P-12 districts have recently established district-level roles tasked with leading diversity, equity, and inclusion (DEI) work (Irby et al., 2022a; Ishimaru et al., 2022; Meyer et al., 2022). Survey data reveal that such roles grew steadily over the 2012–2018 school years. DEI leader role establishment then began to accelerate over the 2018–2020 school years before peaking in the 2020–2021 school year following summer 2020 racial justice protests. Nearly half of DEI leaders surveyed in this research reported that their district created such a role during the 2019–2022 school years while almost 40% of all U.S. districts serving 15,000 students or more had such a role as of fall 2021. Like corresponding roles in corporations and universities, district DEI roles reflect the process of institutionalizing equality mandates and social justice demands within organizations through roles, departments, and policies (see e.g., Dobbin, 2009; Shi et al., 2018; Williams & Wade-Golden, 2013). District DEI roles, most often designed as "equity director" (ED) roles, are new organizational roles through which superintendents and school boards appoint an individual to lead "equity" work across districts—both increasing district prioritization of DEI work and increasing expectations for district-wide DEI impact.

While ED role establishment is a significant step often reflecting years of internal and external pressure on districts (Matschiner, in progress; see Chapter 2), issues of *role design* may determine the ultimate impact of such roles. Williams and Wade-Golden (2013), studying higher education "chief diversity officers," warned, "It is too often the case that roles are poorly designed and inadequately positioned to be successful" (p. 37). Specific to EDs, Irby et al. (2022a) argued, "Districts did not uniformly extend equity directors the positional power, resources, and authority to carry out the work they expected them to accomplish" (p. 419). Thus,

given the significance of intentionally designing DEI leader roles for success, this research examines P–12 ED role design across a national sample of district EDs.

Role "configuration," "organization," "structure," and "design" are sometimes used interchangeably when researching organizational roles. In this article, I situate "role design" as a broad set of individual and organizational factors that collectively shape "role configurations." I recognize that referring to how roles are "designed," "organized," or "structured" all similarly invoke attention to role characteristics and role positioning within organizations. I opt for the phrase "role design" to signal the importance of intentional decision-making, deliberately aligning role features with desired role aims, and because so many of these roles were recenlty created. By "role design," I refer to an iterative process, guided by desired role aims, seeking to define core role duties, define vertical and horizontal role relationships, and equip roles with resources (e.g., financial) and forms of authority.

Irby et al. (2022a) explored four common ED "role configurations" across 13 EDs: equity "management and compliance," equity "innovation and development," equity "seeding," and equity "collaboration" role configurations (p. 432–433; see Literature section). I sought to build on this seminal research by surveying, in addition to interviewing, a larger and more recent sample of EDs. Thus, using interviews and surveys from over 70 EDs across 29 states conducted throughout the 2020–2022 school years, this research asks the following: *Across a nationally diverse sample of P–12 districts, how are districts designing ED roles*? *Who holds such roles and what role characteristics are most common, and to what extent are roles designed in ways that support district-wide DEI impact*? This article's focus on role design is intended to help researchers understand how superintendents and other district leaders conceive of district DEI roles and how current role design features support and constrain district-wide DEI impact.

In this article, I explore how ED design reflects districts' increasing focus on the experiences of students of Color and district leaders' choices to subsume prior language, student services, and human resources central office functions under the umbrella of "equity work." I then analyze national patterns in DEI leader role design, addressing the *what* (i.e., roles' focus on equity), *who* (i.e., leader identities and leaders' prior roles), *when* (i.e., role establishment year), and *where* (i.e., in this case, the organizational placement of roles within districts) of district DEI leadership roles.[3] I then explore role design features related to possible district-wide DEI impact and role features currently limiting district-wide DEI impact.

I find that among this large national sample, equity director roles are most often held by Black leaders and women of Color, many of whom served in school administration roles prior to assuming ED roles. Roles are designed across a range of central office homes, including increasingly common district DEI departments. Such roles are often created with limited staff to support district DEI work and often precarious financial support. Findings demonstrate that district leaders have increased the rank of DEI leader roles in recent years (compared with leader ranks documented in prior research; Irby et al., 2022a), and increased ED access to district leadership and district leadership decision-making with many EDs serving on the superintendent's cabinet. Despite districts increasing the rank and access afforded to EDs, this research finds limited staff and financial resources routinely undermine ED roles and district-wide DEI impact—role design dynamics I summarize as *rank with limited resources* and *access with limited authority*. Findings suggest that ED roles need greater role support and associated authority to drive district-wide DEI impact.

[3] Future work will examine "where" geographically ED roles are established, including district, student, and local partisan characteristics of districts that have established ED roles.

This article first addresses the literature on ED roles in P–12 settings before reviewing theory on DEI leader role design more generally. Research and data analysis methods are then discussed before presenting findings. Finally, implications and conclusions are presented in support of more effectively designing ED roles.

Literature

District central offices have taken a more active role in teaching and learning functions over the last 30 years. Traditionally expected to perform a small set of administrative services (e.g., payroll), district central offices now provide a range of instructional support functions (e.g., mentorship for new teachers and principals; Honig, 2013), with some districts reconfiguring existing central office infrastructure and adding new functions in order to meet measures of academic growth and address "gaps" in academic and discipline outcomes.

Some such efforts are now often conceived of by educational organizations as addressing and advancing "equity" (see e.g., Jurado de los Santos et al., 2020). Datnow et al. (2005) summarized, "The role of the district in educational improvement is vital, and districts are taking an increased role in directing school improvement" (p. 448), while Rorrer et al. (2008), reviewing the role of districts in reform efforts specifically, argued one primary district reform role is "maintaining an equity focus" (p. 314).

The concept of "educational equity" has long been used by education scholars and practitioners (e.g., Banks & Banks, 1995; Lawrence & Tatum, 1997) with "equity" becoming a central aim of many educational organizations over the last fifteen years (Jurado de los Santos et al., 2020). While *equality* of resources, opportunities, and treatment for all students was central to many twentieth-century educational struggles and legal remedies (e.g., Title IX, *Brown v. Board of Education* rulings, the *Individuals with Disabilities Education Act*), education leaders

and scholars have more recently turned to a focus on *equity* to pursue work attempting to better support students of Color, LGBTQIA students, students experiencing poverty, and other minoritized students, often distinguishing equity from equality. Still, literature on general school district reform finds such efforts often inconsistently center equity issues (e.g., Noguera & Pierce, 2016; Trujillo, 2016). Furthermore, existing literature tells us relatively little about how district central office staff specifically engage in efforts to address persistent forms of inequality, including central office roles specifically tasked with supporting equity-focused district improvement.

Contextualizing an increasing focus on "equity" in districts, Minow (2021) explained, "Rejecting identical resources and identical instruction as insufficient to meet the different needs of different students, education advocates stress that 'equity' calls for something different than the same treatment for all that they associate with 'equality'" (p. 174). Thus, Minow (2021) continues, "The use of 'equity,' especially in the context of schooling, reflects the disappointments of 'equality' and 'equal protection' as interpreted and implemented…The turn to 'equity' marks a search for different results" (p. 171). District ED roles then represent both districts' "turn to equity" and district central office leaders' more active role in attempting to improve student experiences and outcomes, specifically for students of Color, LGBTQIA students, and other minoritized students.

How do districts design central office roles for an "equity focus"? Existing literature on ED role design and configuration is limited, with the important exception of Irby et al. (2022a). Examining role configurations across 13 ED roles with data collected between 2017 and 2019, Irby et al. (2022a) explained, "We use the term 'equity director role configurations' to reference (a) the position of the role within the organizational structure and (b) the forms of organizational

power and authority equity directors are afforded to carry out what becomes their assigned work" (p. 428). Irby et al. (2022a) detailed four equity director role configurations: "equity seeding configurations" (i.e., "leadership activities that plant core equity ideas into the district's guiding documents, policies, and discourses" [p. 430]); "equity collaboration configurations" (i.e., "supporting and working with a broad range of stakeholders to advance equity" [p. 431]); "equity management and compliance configurations" (i.e., roles with elevated responsibility but "overwhelmingly managerial and compliance oriented" work [p. 431]); and "equity innovation and development" configurations (i.e., roles with "a relatively high level of autonomy and influence on the direction of district equity programs and initiatives" yet limited "influence over long-standing organizational units" [p. 440]). Various role configurations call attention to how ED role design accounts for and shapes ED role core duties, role resources and power, and collaborative relationships across district units among other considerations.

Further, Irby et al. (2022a) detailed four common forms of influence and power potentially afforded to EDs: supervisory authority, influence on the superintendent and/or board members, financial resources, and influence over district professional development. Still, regarding ED role design and leader dynamics, Irby et al. (2022b; see also Ishimaru et al., 2022) summarized more skeptically:

> The people who fill the role–primarily Black and other women and people of color–are often made vulnerable because of uncertainty about their role and responsibilities, unclear organizational goals, and racial-gender oppression in the workplace. Despite this, districts continue to create equity director positions. And willing and capable leaders continue to fill them.

Together, existing research begins to paint a picture of ED role design while raising questions about unclear role aims, unclear collaborative expectations with other district units, limited role

resources, limited decision-making authority, racial-gender oppression experienced by leaders of Color and women of Color specifically, and the ultimate impact (or lack thereof) of ED work.

To what extent do previously documented role design patterns hold across a larger, more national sample? How have role design dynamics potentially changed in recent years, particularly with 60% of EDs surveyed reporting their district established an ED role during the 2018–2022 school years? Questions of ED role design are significant now specifically as findings might inform how district leaders design and evolve these now-relatively-common roles and better support the leaders who fill such roles. I now turn to research on DEI leadership "role development" to ground this article theoretically.

Theory on Diversity, Equity, and Inclusion Leadership Role Design

Theory from sociology and management on organizational design (e.g., Galbraith, 2002; Galbraith et al., 2002) points to the importance of role design within broader organizational design processes. In the context of higher education DEI leader roles, Williams and Wade-Golden (2013) explained, "We define organizational design as the creation of roles, processes, lateral structures, and formal reporting relationships within an organization. It is the process used to match the *form* of the organization as closely as possible to the *goals* of the organization" (p. 37). Role design then is one important component of broader organizational design through which organizational leaders attempt to align organizational roles with desired organizational outcomes. Specific to DEI work and roles, researchers have argued that leaders inconsistently attend to issues of design in both higher education DEI roles (Williams & Wade-Golden, 2013) and P–12 ED roles (Irby et al., 2022a). Given such findings, issues of role design appear significant in moving beyond ED role creation to intentionally structure and evolve ED roles.

Creating specialized roles within organizations involves both logical and practical considerations. The logic of role specialization is that "Work can be performed better if organizational tasks are subdivided into individual jobs or groups of jobs that form a department or division" (Williams & Wade-Golden, 2013, p. 38), while the goal of role specialization is to "match an area of work to an individual or a group of individuals who have a specific set of knowledge, skills, and abilities in this functional area" (p. 39). In the process, organizations attempt to "create a standardized ability to achieve the goals associated with each of these units in a more efficient and uniform way than if the dedicated leadership role did not exist" (Williams & Wade-Golden, 2013, p. 39). Specific to DEI work within organizations, Williams and Wade-Golden (2013) summarized, "At the heart of the idea of specialized diversity capacity is a belief that strategic diversity leadership is a knowledge-intensive field that requires expertise and dedicated staff to accomplish" (p. 62).

As organizational leaders consider intentional role design, Williams and Wade-Golden (2013) argued, leaders should be mindful of two important role design dynamics, among others, hindering DEI leader role efficacy and organizational impact: (a) large, organization-wide mandates for change accompanied by limited resources and (b) unclear expectations (and related authority) regarding how DEI leaders might collaborate across existing organizational functions. Regarding limited resources despite a large mandate for change, Williams and Wade-Golden (2013) argued, "Too often, the CDO role is limited in its effectiveness because of a misaligned span of attention, in which the CDO has a broad mandate, but has few staff, material, and budget for human resources to move the diversity agenda forward" (p. 66). Further, (Williams and Wade-Golden (2013), addressing DEI leadership roles as an "integrative leadership role" (p. 78), wrote, "The focus should be on creating a new role that is more than a job or position because it

rests at the center of a network of previously disparate capabilities…all of these disparate pieces must connect with one another if they are to define a core diversity competence" (p. 38). Accordingly, this article attempts to construct a nationally-informed portrait of ED roles and design dynamics contextualized by theory reviewed in this section while contributing to research on impactful ED role design (e.g., resources allocated for EDs' work, collaborative expectations for EDs' work across district functions).

Methods and Data Analysis

This research used a qualitative approach to explore ED role design. Analysis drew on interviews and surveys, after website review across a strategic sampling of districts most likely to have EDs to locate districts with ED roles (see Greene & Paul, 2021); emails to such districts' EDs; and finally, over 100 hours of interview data with 72 EDs and surveys from 64 EDs working across 29 states and all nine U.S. census regions. I sought to interview as many EDs nationally as possible to inform this study. I sought EDs for this sample primarily by reviewing district websites and organizational charts in all U.S. districts serving 15,000 or more students based on National Center for Education Statistics (NCES) Table 215.10 data in fall 2021. I did this because a prior report (Greene & Paul, 2021) indicated larger districts are more likely to have established ED roles.[4] I located EDs in 213 (i.e., nearly 40%) of the 550 U.S. districts serving 15,000 or more students and reached out to all of them personally to see if they might be interested in participating in this research. Secondarily, I used Google search results (i.e., searches for publicly identifiable EDs using "district equity director" and "district equity officer"

[4] Findings on the prevalence of ED roles nationally (i.e., nearly 40% among the largest 550 U.S. districts) build on prior analysis from non-peer-reviewed work published by the Heritage Foundation (Greene & Paul, 2021). Researchers (Fierros, 2022; Rice-Boothe & Marshall, 2022) have criticized this plainly partisan report, raising questions about methodological choices and unsubstantiated conclusions. The report, which categorically states that "CDOs do not and cannot promote equality in student outcomes" (p. 11), is part of the larger attack on district efforts to equalize educational opportunities for students of Color. I acknowledge the report here as I similarly analyzed ED role establishment and design nationally using more recent National Center for Education Statistics data.

keyword searches) and snowball sampling methods (i.e., asking EDs interviewed if they knew other EDs who might want to participate in the study) to locate EDs in districts serving fewer than 15,000 students. As ED roles are established in districts of all sizes, I supplemented national sampling across all districts serving 15,000 students or more with convenience and snowball methods to provide a more comprehensive understanding of ED role experiences.

Across all three sampling methods, I used web searches, analysis of district organizational charts and websites, and analysis of local online news sources to determine whether district DEI-focused leader roles existed in a district. I included all roles that invoked "equity," "diversity," and/or "inclusion" in the role title, with most titles ultimately included in this study combining multiple concepts. I also included role titles that invoked "equity," "diversity," or "inclusion" in combination with other concepts such as roles addressing "equity and innovation" or "equity and access." I did not include roles that did not invoke equity, diversity, or inclusion, except in the very rare case that role titles clearly suggested a focus on supporting minoritized students such as "minority achievement officer." I included district roles regardless of role rank (e.g., coordinator, director, assistant superintendent).

I attempted to contact all EDs by email or through Linkedin when an email was not publicly available. Among EDs ultimately participating in the study, I located 60 EDs based on the primary sampling method drawn from outreach across districts serving 15,000 students or more. I located 11 additional EDs using web searches and one additional ED based on snowball sampling, with these 12 willing EDs coming from districts serving less than 15,000 students. Appendix B details sampling methods in more depth.

This research then predominantly represents the perspectives of EDs working in districts serving more than 15,000 students (i.e., 60 of the 213 such EDs identified nationally, over 25%

of such EDs) plus experiences drawn from EDs working in smaller districts. This sample is nationally diverse in many ways but is not nationally representative of all U.S. districts, and I do not purport to compare small versus large districts in this study.

Across districts where I interviewed EDs, enrollments ranged from less than 3,000 students to over 450,000 students with a median enrollment of approximately 28,000 students. Per U.S. census regions, 35 EDs worked in districts in Western states, 16 in Southern states, 16 in Midwestern states, and 5 in Northeastern states. Per NCES, 43 EDs worked in "city" districts while 29 EDs worked in "suburb" districts; no EDs interviewed worked in "town" or "rural" districts. Over 60% of EDs in the sample identified as Black; over 10% identified as Latinx; and over 10% identified as multiracial (i.e., Latinx and Indigenous). ED identities are presented in full in the Findings section. Appendix A anonymously details each of the 72 districts where EDs worked with student enrollment, U.S. region, NCES district locale, and the year of ED role establishment; I notate EDs by region versus state because I promised such anonymity.

Research methods included semi-structured interviews and surveys with EDs (Fontana & Frey, 2005; Merriam & Tisdell, 2016). Study participation included two 45-60 minute semi-structured interviews and a survey administered using Qualtrics. In total, I conducted two interviews with 62 EDs, only one interview with the remaining 10 EDs due to ED schedules and role transitions, and 64 EDs completed the survey. Interviews focused on ED role design, equity leadership activity, role affordances and constraints, role collaboration, and the politics of equity work locally. Interviews were scheduled with an average of four to five months between interviews; the majority of interviews were conducted between February 2022 and June 2022 while the majority of surveys were completed during the same window. I asked participants to complete the survey following the first interview so I could ask follow-up questions based on

survey responses in the second interview. In interviews, I specifically followed up on role design details. Analysis in this article draws on both survey and interview data, with survey data used to identify trends in ED role design characteristics and interview data used to capture EDs' perspectives on such trends and the impact of trends on their work. The survey, which I gave EDs between interviews to allow for follow-up questions in the second interview, asked about racial/ethnic and gender identity, ED role establishment year, design features such as who EDs report to in their district, ED role location within central offices, budgetary and staff support, and ED experiences of role support. Interviews took place over Zoom or phone and were recorded using Zoom or Google Voice. Recordings were then downloaded and transcribed. Appendix C provides the interview protocol while Appendix D provides the survey.

I used Qualtrics data analysis features to identify aggregated ED role design patterns. I began this process as early as data collection in order to ask EDs about particular role design dynamics in the second interview. I analyzed interview data in order to understand the rationale (or seeming lack thereof) behind particular ED role design patterns. For example, survey responses indicated many EDs—ultimately 40%—reported directly to the superintendent in their district. Thus, in the second interview I asked EDs in such a position about how this reporting structure came to be and the significance of this direct access to the superintendent.

When presenting ED examples and quotes throughout the findings, I use EDs' self-identified racial/ethnic identities, gender identity, and region of the country to contextualize quotes. When discussing particular role dynamics, I often include specific context related to the design dynamic (e.g., including the rank of EDs to contextualize a quote on increasingly elevated ED role ranks). Throughout the findings, quotes and narrative analysis are drawn from interview data while aggregate claims are drawn from surveys.

Finally, this research did not include interviews or surveys with superintendents. As superintendents played a critical role in designing ED roles, per EDs, this is an important area for future examination. Data drawn from superintendent interviews would provide another perspective on ED role design, specifically addressing the thinking behind critical role design and evolution choices.

Findings

In interviews, EDs, many of whom worked for their district before becoming an ED, detailed how two central office organizational shifts in particular informed ED role design: (a) an increasing focus on race and the experiences of students of Color and (b) the choice to combine prior central office diversity, language, student support services, and human resources functions under the umbrella of "equity work." Many EDs shared their experiences with prior district DEI work dating back to the early 2000s, and in some cases, the 1990s. I detail such role design influences here using interview data to account for district DEI-related work pursued prior to the advent of ED roles and to provide initial context for role design dynamics that I detail later in this section (e.g., where ED roles are situated within central offices).

Equity directors shared that ED roles built on prior diversity, multicultural education, and human relations work while ED role design specifically included a new or expanded focus on race and how districts might take action to address racialized district opportunity patterns. A Black female ED in a Western district described prior district work as "the old school diversity kinda, you react to this group of people and respond to this group of people in this way. It was that old school diversity training that was going on" while contrasting that focus with current ED roles focused on work "talking about equity and diversity and how they are different."

EDs with significant experience in their current district recalled little explicit focus on racism or districts' role in reproducing racial inequality in earlier district diversity, multicultural education, and human relations work taking place between roughly 1995 and 2010. Reflecting on his experiences as a staff development specialist during the "early two thousands," a Black male ED in a Southern district commented,

> It was interesting because I had a colleague and we would talk all the time, and at that time we didn't really have a conversation about race. We did on the side, but it wasn't a conversation that the district was having. It was more around poverty and the increase in the number of ESOL students. So it was kind of radio silence for a while as a district.

Current EDs themselves shaped ED role design by advocating for an explicit focus on race and racism in district DEI work while in prior roles. A Black female ED in a Midwestern district shared her struggle shifting district diversity work to address race and racism in addition to an existing focus on poverty:

> I got a lot of pushback at first and it was, 'You talk about race too much. The real issue is socioeconomic status.' And I said, 'Fine, let's talk socioeconomic status.' At the time, we were a 49% free and reduced lunch district. 87% of that 49% were students of Color, even though we [students of Color] were only 19% of the total student population. So I said 'At some point, we're gonna have to come to the acceptance that they're interwoven and really address some issues of race.'

In addition to an increased focus on racism and remedying racialized district opportunity patterns, EDs indicated that ED role design appeared to be informed by district leaders' decisions to combine a range of existing district functions and roles under the umbrella of "equity work." Equity directors reported that ED role design often reflected district leaders' decisions to combine existing diversity, human resources and compliance, language, and/or student support services functions together under a single, new organizational focus now led by EDs. As part of this reorganization process, many district leaders decided to increase the organizational prioritization afforded to such work by expanding the scope of newly-created ED positions and

elevating the rank of ED roles compared with prior DEI-focused roles (e.g., multicultural education coordinator roles).

Equity directors shared stories illustrating how current ED roles built on prior district work or structurally combined prior district functions, often with a larger scope and/or an increased role rank. For example, some EDs described how the design of ED roles was influenced by expanding or mimicking an existing role such as assistant superintendent for student services. A Black male ED in a Southern district who was previously in an assistant superintendent for student services role explained, "Equity was kind of on the scene [in the mid-2010s]…they added the equity approach to my office mainly because of the passion that I had around it. It wasn't formal, but they made it, the district and the board made it a formal part of my job." A Black male ED in a Western district who served for many years as the district director of student services, described how district leaders would "just throw things into my department." He remembers, "They said, 'Okay, you're in charge of athletics and all these other things, but we also want you to be in charge of equity,' is how it normally worked." When a new superintendent began, the ED shared with the superintendent,

> If you want me to do this equity and social justice work, it's just not going to happen. You know you have to take something off my plate if you're serious about this work happening. And if you're not, we'll keep going down the same road we are, but we're not going to get to the results.

The following year, the superintendent designed a new role with a specific focus on equity: an executive director of equity and diversity role.

A Latina ED in a Western district shared how she shaped ED role design through a "rebrand" of her language-focused department:

> And after the first year [in her prior role], that's when I approached the administration and said, 'I would really like to rebrand this department. I would love for—our programs

> were separated into different departments—and so my proposal was to bring all the programs together under the umbrella of 'student educational equity'…and so we rebranded…we named it the 'student educational equity department' and brought all the programs under that.

Other EDs recounted how prior human resources central office work informed ED role design through building on compliance-focused, civil rights work. One ED, a Pacific Islander female in a Western district, shared, "From the very beginning it was just a compliance type of a thing, so that there was an office that dealt with English language learners [given an OCR investigation]. So that was my main thrust when I first got here [in a district leadership role] in 2005, but I just felt like in order for us to stay viable and visible, we needed to grow and reach out because equity is so many other things as well."

Equity director roles were often designed with an expanded role scope beyond work previously organized in student services roles, language-focused support roles, or human resource roles. One ED, a Latina in a Western district, elaborated on how she and an advisory group she convened as the associate superintendent for teaching and learning successfully lobbied district leaders to pursue district equity work through new dedicated central office infrastructure. She summarized this as "So let's recraft, kind of reorg[anize]" while explaining that "the intent from the board and from our superintendent was let's be able to have clear deliverables and a body paying attention to this work throughout the system that can work alongside everyone else." Another ED, a Black male in a Northeastern district, explained how his "assistant superintendent of equity" role, which built on a prior director of community engagement role, was created with "more oversight of some other different resources and staff in the district" in order to provide "a priority that's placed on [equity] efforts in districts that oftentimes isn't the same amount of support as they need."

ED roles were often initially designed with a measure of elevated authority that reflects increasing district prioritization and the desire for "equity work" to transcend any single district unit or function. Having provided context on how prior district DEI roles and work broadly influenced the design of current ED roles, I now turn to analyze the characteristics of such roles and the leaders who hold them nationally.

District DEI Leader Role Design

This section addresses the characteristics of P–12 district DEI leadership roles, providing the first effort at a national portrait of such roles. I proceed by first examining the what (i.e., what is the focus of district DEI roles), who (i.e., who holds such roles), when (i.e., when were such roles established), and where (i.e., where specifically within district central offices are roles situated). Next, I analyze two key role supports named across EDs, followed by two important role constraints. Increasing role rank and elevated access through, for example, cabinet membership appeared to support leaders' efficacy and district DEI impact while limited staff support and precarious financial support appeared to constrain leaders' efficacy and district DEI impact.

Across this national sample, findings demonstrate DEI leadership roles are currently most often designed as mid-level "director" roles with the rank of such roles often elevated over time. The most common concept invoked by role titles, more than "diversity," "inclusion," or "access," was "equity." Such roles were most often held by Black leaders and women of Color who were often internal candidates that held school and/or district administrator roles before beginning as EDs. Among leaders surveyed, nearly 50% of leaders reported that their district established an ED role during the 2019–2022 school years (i.e., within the last three school years at the time of the survey). Roles are now positioned variously across district central offices,

including in superintendent's offices, as part of stand-alone DEI departments, and in other central office departments including often "student support services" offices. Such roles are most often established with comparatively limited staff resources (i.e., compared to other central office departments) and limited and precarious financial support.

The What, Who, When, and Where of District DEI Leader Roles

Nearly 80% of DEI role titles invoked "equity," with "diversity," "inclusion," and other terms invoked far less frequently. Figure 1 illustrates the prevalence of various concepts among role titles. The overwhelming presence of the concept of "equity" among role titles signals the ascendance of an "equity" paradigm in P–12 education (see Minow, 2021) and invites questions about what this common and broad concept means to district leaders and how it is operationalized across districts, including by EDs themselves. As discussed previously, in many districts work now pursued under the label of "equity" brought together various prior district work while often initiating new race and racism-focused district efforts.

What is The Focus of District DEI Roles?

Many EDs shared conceptions of "equity" informed by providing every student with what they need to be successful while contrasting such an approach with "equality" as providing every student the same support. EDs further explained "equity" commitments as involving engaging and disrupting larger systems of oppression, including white supremacy, patriarchy, heterosexism, and "standard" language ideology among others. Reflecting findings from the prior section, ED conceptions of "equity" almost always included additional attention to historically marginalized students, most often Black, Indigenous, Latinx, Asian American, and Pacific Islander students.

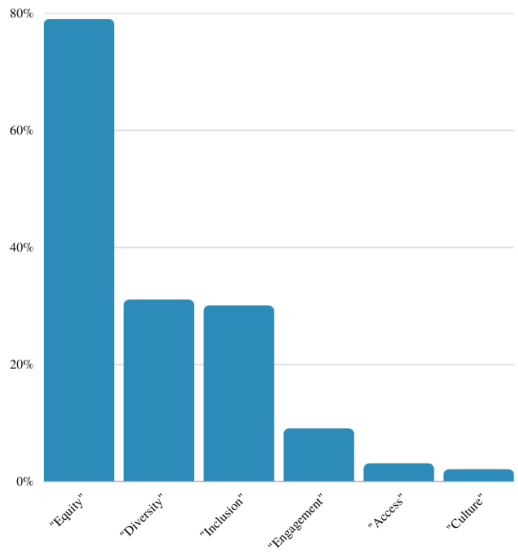

Figure 1
Role Titles by Concept

Accordingly, a Black male ED in a Midwestern district shared a collaboratively-developed definition of "equity" used within his district:

> Equity is a constant act of everyone engaging in purposeful educational social justice leadership to disrupt acts of injustice and to dismantle systems of oppression and marginalization that produces disparities in our schools. This constant act of leadership serves to affirm all students and stakeholders, including those identities who are Black, Brown, Asian and/or Pacific Islander, Latinx, and Indigenous; students who are differently-abled; students who experience poverty; students of different religious faiths; students of different gender and sexual identities; students who are culturally and linguistically diverse; and their intersections.

Across interview data, EDs repeatedly described district equity work as an ongoing, multi-year "journey." A white male co-leader in a Western district described the equity work trajectory in his district, a district he had worked in for over 20 years, calling it "transforming":

> [Initially] our commitment to equity was barely performative at best in saying that it was one of our [district strategic plan] pillars. We were kind of saying, 'Yes, we're equity

> focused because we have in place, like we're an AVID [Advancement via Individual Determination] district. We have AVID for students.' We had a lot of the things, the programs. We were transforming into a standards-based learning system…We've done away with the F grade at the secondary level. So it's been a gradual progression of realizing that we are saying things that we're not backing up with action. And so we continue to try to move from performative to actual equity.

Other EDs shared similar experiences of their district attempting to move from "performative to actual equity" over many years designing impactful ED roles tasked with catalyzing system-wide, "actual equity" improvement work.

Notably, scholars of education raise questions about how district leaders can invoke "racial equity" while not actually pursuing "emancipatory approaches for responding to race and class inequity" (Turner, 2020, p. 12) in favor of managerial and other responses that fail to disrupt racialized district opportunity patterns. Equity directors themselves further raised questions about the specificity of "equity" and the potential for others to co-opt "equity" in ways that might misrepresent EDs' intended meaning and diminish associated efforts. A Black female ED in a Midwestern district reflected,

> That's my new thing right now, pushing 'racial justice' because 'equity' has become a term that everybody throws around, and 'Oh yes I…oh yes, this…' So my team and I, we speak about 'racial justice,' which tells you exactly what we're doing. Equity is kind of out there. People take it and perceive it [differently], but 'racial justice' kind of narrows it down just a little bit more. People still take that and run any kind of way, but it narrows it just a little bit more.

Given the breadth of "equity" as a central organizing concept, related findings throughout this section contextualize how district leaders design ED roles in light of this general focal phenomenon.

Who Holds ED Roles?

Over 60% of EDs in the sample identified as Black; over 10% identified as Latinx; and over 10% identified as multiracial (i.e., Latinx and Indigenous). Approximately five percent identified as Pacific Islander while approximately five percent identified as white. One ED identified as Asian American, one ED identified as Native, and one ED self-identified as Arab. Nearly 60% of EDs identified as female and over 30% of EDs identified as Black women specifically. Figure 2 documents the most common ED identities.

Consistent with prior research detailing experiences of racial-gender oppression within districts or "organizational double jeopardy" (Ishimaru et al., 2022), women of Color and Black women EDs specifically shared experiences of racial-gender oppression navigating often white and male district leadership contexts and superintendents not adequately prepared to lead for equity (see also Grogan & Nash, 2021; Tienken, 2021). A Black female ED in a Western district reflected, "I'm the first Black woman and probably the first person of color to ever serve on the district cabinet." She characterized perspectives from other district leaders as often "a white male perspective" that pushed back on racial equity work, saying in essence, "'We don't have issues of racism in the city.'" Reflecting on her experiences of racial-gender marginalization, she concluded, "There have to be some cities where it's more progressive and I don't feel like I'm Ruby Bridges and integrating everything that I'm a part of." Relatedly, Ishimaru et al. (2022) wrote,

> We found that particularly women of color equity directors experienced constant limitations and resistance to their leadership as well as racial battle fatigue (Smith et al., 2007) as a result of the racial and gendered organizational dynamics in their districts—a dynamic we refer to as organizational double jeopardy. Yet, they also drew on their racial and gendered experiential knowledge to reshape their roles, increase their access to organizational resources, and enhance their ability to lead change towards systemic equity. (p. 6)

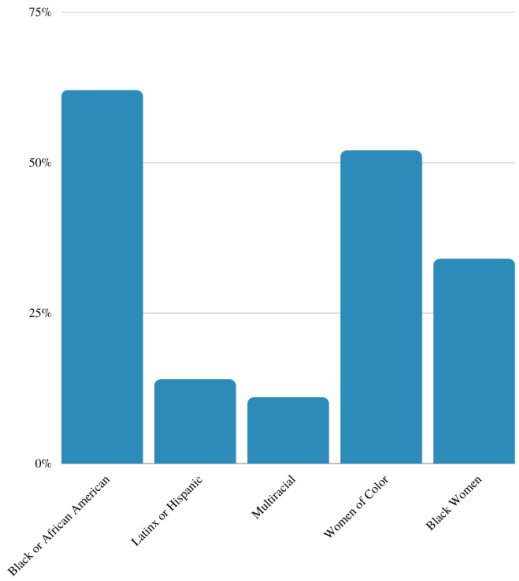

Figure 2
Most Common ED Racial/Ethnic and Gender Identities

I further contextualize the work of Black leaders and women of Color in more depth elsewhere (Matschiner, in progress; see Chapter 2) using Lerma et al.'s (2020) concept of "racialized equity labor," positioning EDs as often crucial "insider activists" (Briscoe & Gupta, 2016) who long pushed districts to prioritize racial equity commitments.

The most common preceding role held by EDs was a school administrator role. Other common prior roles included central office staff roles in student support services departments or departments of teaching and learning. Figure 3 details the most common preceding roles held by EDs, including school administration, central office leadership, and counseling roles.

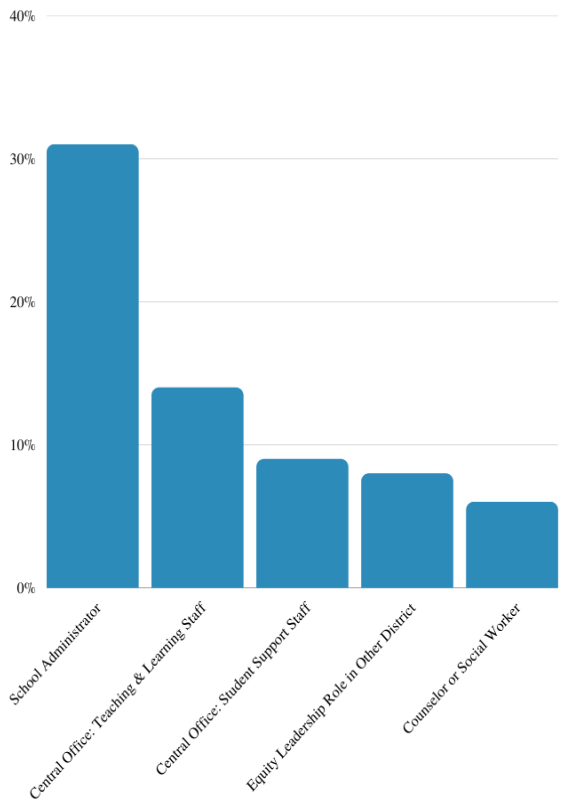

Figure 3
Most Common Role Held Prior to ED Role

In interviews, EDs shared that prior experience with DEI work was one asset they brought to ED roles with some EDs, as documented previously, describing that their ED role expanded and formalized their prior work. A Latino ED in a Western state shared: "I thought it was a fairly easy transition for me given the work that I had done with marginalized kids, especially language learners or language minorities, but also kind of broadening my impact because it affected kids that were not necessarily multilingual learners."

Yet EDs reported differing experiences transitioning into central office leadership roles based on their preceding role. Preceding roles as school administrators were particularly common among EDs hired between 2010 and 2018 as many districts had little DEI infrastructure and associated staff. This was also the case for multiple EDs hired in smaller districts, where

moving from a school leadership role directly to a district leadership role appeared more common than in larger districts.

This transition from school leadership directly to district leadership represents a significant change (i.e., from a single leader with great authority in a school context to one of many leaders with a mid-level rank in a district context) that multiple EDs described as a "transition" or "jump." A Black male leader in a "coordinator" role in a Western district who previously served as a principal, reflected on this school-to-district transition: "I'm kind of in that transitional process…you can't function at the district office the same as running your school…it just doesn't work that way." He elaborated, "I'm trying to bring along initiatives—equity, access, and inclusion—working with different divisions." This ED's experience underscores the significance of horizontal relationships and collaboration (i.e., "working with different divisions") necessary for moving work forward at the district level—relationships, prioritization, and buy-in from a range of other departments that were potentially less relevant when working as the senior leader in a building.

Approximately 10% of EDs came from roles outside of P–12 education. EDs who came from such roles (e.g., working in higher education, working at a law firm), also often noted a steep learning curve related to the current state of DEI work and district processes. A Latina ED who had come from working at a university to an ED role in a Midwestern district reflected:

> It was a very interesting transition because no one prepares you for the beast that K through 12 is…When I started I was really just learning the game, trying to figure out how to do this work because it was really frustrating. I…just didn't realize how K–12 people just didn't understand this work. People were thrown off just by my language. Like when I talked about intersectionality or when I talked about pronouns…people just did not understand what I was talking about. I really did not understand the processes and policies because no one taught me, no one sat me down.

In other cases, EDs who previously held ED roles in another district or who served in other central office leadership roles detailed less of a learning curve (e.g., the ED quoted previously reflecting on a "fairly easy transition"). While it is understandable that EDs with prior central office leadership experience may have "smoother" transitions when assuming ED roles, questions of ED role definition, role clarity, and the work EDs are expected to prioritize offer important questions for designing ED roles for impact (see Irby et al., 2022a).

When Were ED Roles Established?

Findings demonstrate that, among EDs surveyed, ED roles were established as far back as 1996 with 10% of EDs reporting their districts established an ED role prior to the 2012–2013 school year. Districts captured in this dataset established ED roles at a limited and relatively consistent rate over the course of the 2012–2018 school years with between three and seven percent of districts represented by an ED surveyed establishing an ED role during each school year.

Districts began establishing ED roles at a much higher rate in 2018–2019. These findings indicate that rapid ED role proliferation began prior to summer 2020 racial justice protests, spurred by a range of national, state, and local factors (see Matschiner, in progress; see Article 2). Still, 2020-2021 was a particularly accelerated year for ED growth.

The time period in which roles were established may reflect broader historical "period effects" (Lewis-Beck et al., 2011) which potentially shape ED role design. Such period effects appear twofold. While 30% of EDs reported their district created an ED role during 2020–2022 specifically, an equal percentage of EDs reported their district created an ED role during 2018–2020. Thus, data illuminate a broader national effect at play influencing ED role establishment prior to summer 2020. Factors potentially contributing to this effect and

accelerating ED role establishment in the two years before George Floyd's murder potentially included social movement pressure calling attention to racial inequality represented most notably by the Black Lives Matter movement, increasing attention to racism due to newly-emboldened racism encouraged by President Donald Trump, and superintendent's mimicking roles observed in other districts (see Lewis et al., 2023). A more precise period effect driving ED role establishment and a focus on Black students and anti-Black racism occurred over the 2020-2021 school year specifically. For example, in the words of a white female co-leader in a Western district, summer 2020 protests produced a "huge burst of attention and focus on how we're supporting or disadvantaging our Black students and families and staff." Figure 4 illustrates the full range of district ED role establishment years.

Seventy percent of EDs across this research served as the inaugural ED in their district. Rapid role growth over 2018-2022 led to EDs often "learning together" as they navigated roles that were new to their district and even among the first in their state. A Black female in a Southern district reported, "I began to just kind of talk to other people…other districts, and everybody I talked to was new. So we were kind of all learning together."

Where Are ED Roles Established Within Central Offices?

The "organizational position" (i.e., where within districts) of ED roles was split between three "homes" for such roles: larger "DEI departments," the superintendent's office, and other central office departments (e.g., "student support services," "educational services," and other similar departments). As explored previously, the organizational position of ED roles often reflects the focus of prior district DEI work and the role an ED held previously. Figure 5 illustrates ED role organizational homes.

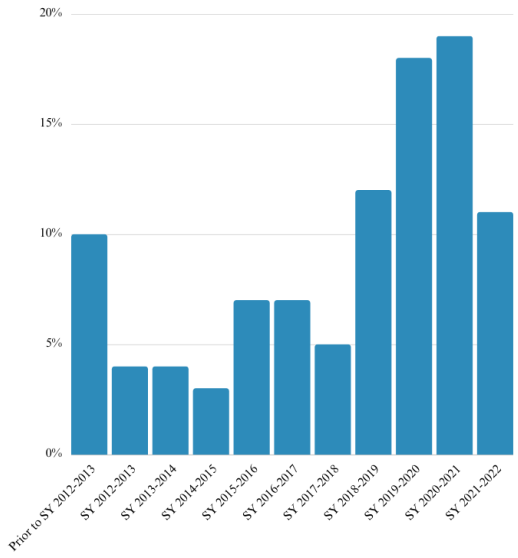

Figure 4
ED Role Establishment Year

District DEI departments appear to be increasing, as prior research (Irby et al., 2022a) found only one DEI leader role (of 13) housed in a "DEI department" or division circa 2017–2019.

Further, Irby et al. (2022a) found one-third of ED roles were housed in "professional development" departments or divisions, with seemingly few roles housed in superintendents' offices. District DEI leader role homes appear then to be changing as (a) districts design stand-alone DEI departments and ED roles are moved to head such departments and (b) the scope of ED roles continues to expand beyond single district functions such as professional development.

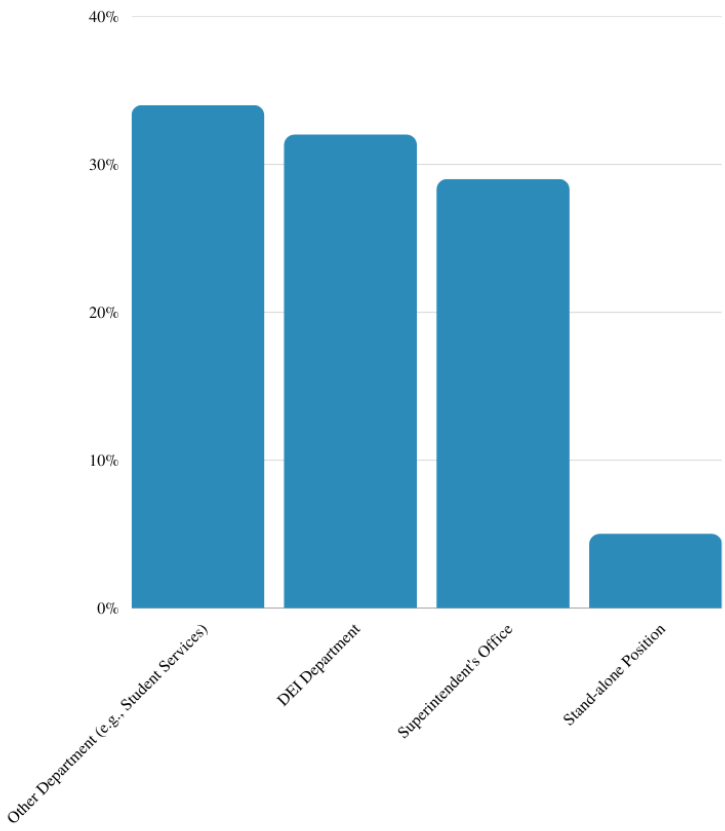

Figure 5
ED Role Organizational Placement within District Central Offices

Both trends are related to role design supports discussed more in the next section. They evidence a broader role scope (e.g., expanding beyond professional development-related efforts) and, in some cases, the increased resource allocation likely necessary for district-wide impact (e.g., designing broader DEI departments with corresponding staff and increased financial capacity).

Pairing broader role scopes with increased resources is important if ED role designs are to support systemic impact. Williams and Wade-Golden (2013) cautioned against the "dilemma" of having a DEI leadership role "defined at a high level of rank" while leaders are still "being pressured into performing duties that are inconsistent with these broader expectations " (e.g., operational duties such as primarily facilitating professional development; p. 60). Thus, while it appears districts are expanding the scope of ED roles beyond PD and other single units such as

human resources, significant staff and financial capacity likely must accompany broader role scopes if EDs are to engage in systemic work and oversee collaborative efforts across different district units.

I now explore these very questions of resources and power in role design. Building on an analysis of the what, who, when, and where of district DEI leadership roles, I explore two aspects of role design that appear to support ED role efficacy and district DEI impact currently and two aspects of role design that appear to constrain ED role efficacy and district DEI impact currently. I refer to these role design dynamics as *rank with limited resources* and *access with limited authority*.

Role Features EDs Indicated Supported Role Efficacy and District DEI Impact

Analysis demonstrates that overall the rank of district DEI roles is increasing when compared to prior trends (Irby et al., 2022a; Ishimaru et al., 2022). Similarly, ED role access (i.e., to superintendents and district-wide decision-making) appears to be increasing when compared with prior cabinet membership and role reporting trends (Irby et al., 2022a; Ishimaru et al., 2022). EDs described both elevated rank and access to district leadership helped increase the potential impact of their equity efforts.

Survey data demonstrates that "director"-level roles were most common, with nearly 50% of district DEI leadership roles designed as "director" roles. These findings extend research findings that district DEI leader roles are most often designed as "equity director" roles (Irby et al., 2021; Irby et al. 2022a). Yet, the rank of DEI leadership roles appears to be changing. While previous research (Ishimaru et al., 2022) with data collected between 2017 and 2019 found less than 25% of district DEI leaders held roles above the "director" level, this research finds nearly 40% of district DEI leaders held roles with ranks above the "director" level (i.e., "executive

director," "chief", or "assistant superintendent" level roles) and over 25% of roles at the "assistant superintendent" or "chief"-level specifically. While nomenclature and role rank conventions are not uniformly consistent across districts nationally, this research suggests a general increase in the rank of DEI leader roles over the last four to six years, and so their potential power to influence district decision-making and priorities. This ascent is consistent with findings demonstrating EDs' ongoing efforts or "agential actions" to "reconfigure" roles for "greater influence and impact" through, for example, advocating for a higher role rank (Irby et al., 2022a, p. 411) to evolve their roles, and the impact of equity-oriented superintendents increasingly centering equity in district work (see Matschiner, in progress; see Chapter 2). Figure 6 provides a full overview of DEI leader role ranks.

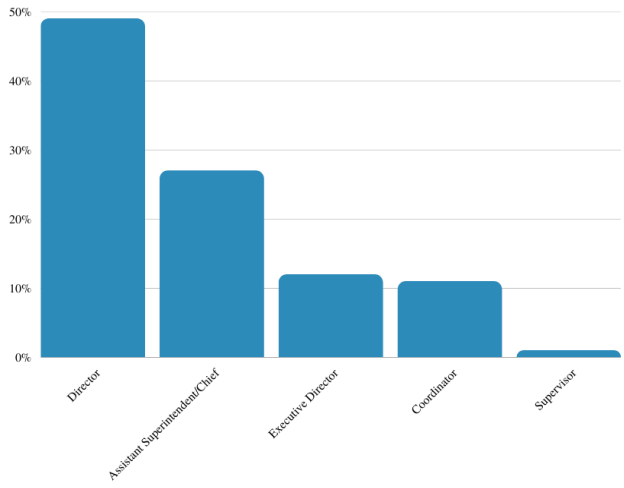

Figure 6
Role Rank

As a Black male ED in a "director"-level role in a Southern district explained, "It was originally just supposed to be a coordinator position, but he [the new superintendent] elevated it to a director position and a direct report position to himself as superintendent." A white male

co-leader in an "administrator" role in a Western district recalled, "So it [the DEI leadership role] was really focused on our instruction and assessment practices and curriculum." After taking the role, he explained, "It was actually moved out of teaching and learning and moved into the office of the superintendent. It was moved to a cabinet-level position. And since then we've actually expanded and there is a co-administrator." Increasing DEI leader role rank potentially signals greater organizational prioritization of DEI work while inviting questions about the extent to which increased resources accompany higher role rank.

In addition to increasing role rank, survey data indicated ED roles were frequently designed or evolved to include membership on district leadership cabinets—one important form of access to superintendents and district decision-making. Over sixty percent of EDs were district leadership cabinet members. An Asian American female in a "director" role in a Western city detailed how elevating the rank of the DEI role in her district and affording her with cabinet membership took place simultaneously: "The position for a director of equity actually came up in this district after the coordinator of equity…had left." She continued, "They [the superintendent and other senior leaders] decided that the coordinator position needed to be revamped and changed into a director role and wanted the director to be part of cabinet. The superintendent knew how important that was." A Pacific Islander female in a "chief officer" role reflected on the impact of her cabinet membership in tandem with her elevated role rank: "By elevating the position out of a director or executive director into an officer [role], [it] allowed me to be on that level with access to him [the superintendent]." She further pointed out that "only cabinet-level people have immediate access to our superintendent as well as sit in on the decision-making for the district. Our executive level directors do not, our coordinators do not sit on the cabinet." Importantly, the ability to "sit in on the decision-making for the district" afforded by cabinet

membership represents one form of access necessary if districts are to center DEI in district decision-making and EDs are to support systemic work across districts.

ED role reporting structure (i.e., who EDs report to within central offices) represents another important aspect of role design contributing to increasing ED access to district-wide decision-making. Over 40% of DEI leaders reported to the superintendent in their district while 20% reported to the deputy superintendent or "chief of staff" (i.e., the second most senior district leader). Accordingly, EDs, equity-oriented superintendents, and other district stakeholders advocated for DEI leadership roles to report directly to the superintendent. A Black female DEI leader in a "chief"-level role in a Southern district summarized,

> The number one recommendation from the [district] task force was for a person to be hired who had senior-level experience and would report to the superintendent or to the superintendent's cabinet so that everyone would recognize this is not just an 'Oh, by the way, we're going to do this. No, this is somebody that has some importance and this is going to be a focus and emphasis of the work of the district.'

Many EDs, then district educators in other roles, first advocated for elevated role access when asked to provide input on the vision for the role. Others advocated for reporting directly to the superintendent during their interviews, including one ED who shared that she told the superintendent she would only consider accepting the role if it reported directly to the superintendent. Such advocacy again underscores EDs' "agential actions" (Irby et al., 2022a, p. 441) to evolve roles in ways that increase the potential for district-wide DEI impact.

In sum, findings illustrate how ED roles have been designed and evolved to include elevated role rank and access to districts' senior-most leaders through cabinet membership and who EDs report to within central offices. While such trends appear to support ED efficacy and district-wide DEI impact, other role design trends appear to constrain such efficacy and impact. Foreshadowing role constraints, Williams and Wade-Golden (2013) wrote, "Although many

CDOs enjoy a high rank, some simultaneously possess narrow spans of control because of limited budgets and staff" (Williams & Wade-Golden, 2013, p. 43). An examination of ED role staffing and budgets suggests serious constraints limiting ED efforts and district-wide DEI impact.

Role Features EDs Indicated Constrained Role Efficacy and District DEI Impact

Staff and financial resources are two important aspects of district capacity to pursue DEI work and enable EDs to actualize visions for their roles. Equity directors reported a wide variation in the number of additional staff supporting DEI work in district central offices and in the budgets provided for district DEI work. Equity directors reported they were most often the only central office position directly supporting DEI work while district DEI budgets were often minimal, temporary (i.e., grant-funded), or undefined.

Nearly 30% of EDs indicated no additional staff reported to them while nearly 20% of EDs indicated only one to two additional DEI staff directly supported district equity work. Thus, roughly half of EDs reported very limited staff capacity to support district-wide impact while multiple EDs used the phrase "department of one" in interviews. A Latina ED in a Western district stated, "I'm a department of one. And so that's another challenge in doing this work when you're the department—a department of one." A Black female ED in a Western district added, "I don't have a staff. I'm not part of any meetings. I don't have a team. I'm a one person, a department of one. I don't have a staff that reports to [me]." Ironically then, district equity work, while often animated by commitments to embed equity across district functions, often falls on a single person charged with systemic impact.

Equity director role design with significantly limited staff capacity may indicate isolated or limited superintendent conceptions of "equity" work and the scope of district activities that

equity work is intended to address, or it could signal a lack of prioritization of equity work among district leaders. Either way, despite many superintendents' and school board leaders' rhetoric pledging to address racially disparate patterns across their district, many leaders continue to design roles in ways that likely imperil EDs' ability to drive district-wide DEI impact.

Among those EDs with large or expanding staff capacity (i.e., three or more additional staff supporting district equity work), EDs shared a range of positions they hired to support district-wide impact across multiple units: positions collaborating with assistant superintendents to increase graduation rates, particularly among student of Color subgroups; positions collaborating with human resource departments on "recruitment and retention programming" increasing the diversity of district educators; positions supporting principals with school-level equity issues and equity-focused improvement; and positions leading equity-focused professional development at school sites. EDs reporting six or more additional staff most often worked in large districts (e.g., districts often serving more than 50,000 students) with long ED role histories and roles established more than eight years ago. Additional staff provided EDs with the capacity to transcend symbolic or limited, advisor-type roles and instead influence and collaborate across functions to better address systemic equity issues.

Over 15% of EDs reported no funding or undefined funding for their work beyond their salary while roughly 35% of EDs reported annual budgets totaling less than $250,000 in districts where other departments routinely were provided budgets totaling multiple millions of dollars. Among EDs reporting a specific budget amount, the median budget for district DEI work, excluding ED salaries, was $300,000.

When asked about budgets, an ED shared simply, “There is no funding allocated specific to equity work.” Another ED added, “My salary and $10,000 as of right now. I am working on obtaining additional funding.” A third ED recalled, “I walked into no budget this year, so I really was handcuffed.” Other EDs reported ongoing efforts to negotiate a permanent budget line item over which they had autonomy, including an ED who had served in her role for three school years before a specific budget line was created: “My god, I just got a budget last year. So when we talk about support for this work, that was one indicator that I did not [have support].”

Many EDs, even those with budgets over $1,000,000, reported not having a dedicated line item in district budgets. Equity directors often reported amalgamating multiple sources of non-permanent funding to support equity work through lobbying superintendents, requesting funding from other central office leaders with dedicated budgets and budgetary autonomy, and using grant funding from federal Elementary and Secondary School Emergency Relief funds. EDs contrasted this precarious budgetary reality with other district leaders in similarly-ranked roles leading other district functions (e.g., human resources, curriculum and instruction). A Latino ED in a Western district described that, despite being the second ED in a district that established the role in 2018-2019, his budget was “vastly, vastly smaller” than budgets for other district units. Figure 7 and Figure 8 detail district DEI staff and financial capacity, respectively.

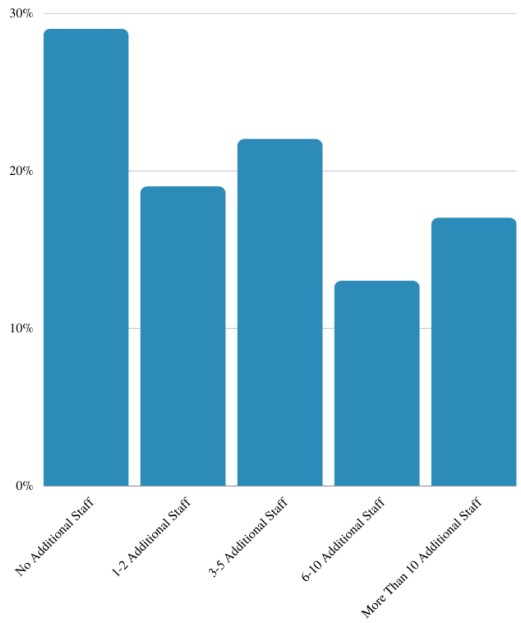

Figure 7
Additional Equity-Focused Central Office Roles Supporting DEI Work

Researchers (Irby et al., 2022b) have cautioned against this very dynamic: "Equity directors have more success when they have access to generous financial resources, including influence and authority over budgetary decisions and allocations" (p. 2). Accordingly, Irby et al. (2022b) further argued, "Supportive role configurations offer supervisory responsibility and authority, financial resources and budgetary discretion, influence on superintendent and board relations, and involvement with district professional development and instructional matters needed to fulfill the responsibilities of the job" (p. 2).

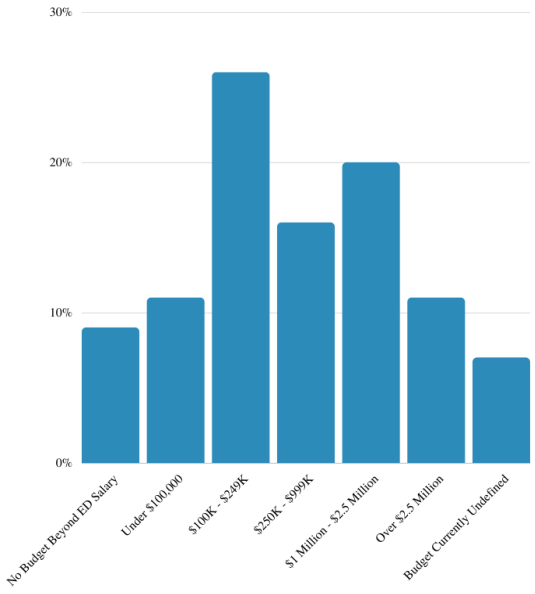

Figure 8
District Equity Work Budget, Excluding ED Salary

EDs described how limited staff and financial capacity offered little authority, with a Black male ED in a Northeastern district comparing ED work without such staff and financial capacity to equity work being "done by puppies and wishes…it'll all fall down on me." He explained,

> I think an island is a very good way to describe it [his DEI work]. What you do is you have cruise ships that occasionally stop by. And what you do is you try to get those people to stay on the island just a little longer, so they can help you with what's going on…[but] there's an endpoint…I'm doing a lot of, 'Let's all have a party' to get people to be a part of this [DEI] work and to just be a part of the work…you know, it's work done by puppies and wishes, that's kind of how this operates…it'll all fall down on me.

Thus, without staff and financial capacity, many EDs reported having neither sufficient resources nor authority to advance district DEI work. Irby et al. (2022b) similarly argued, "Configure the

equity director role with adequate power and authority to allow directors to put their equity leadership 'know-how' and skills into action" (p. 1).

A Latina ED in a Southern district reflected on both her limited resources and authority while describing what truly district-wide equity work would look like if she and her team had such resources and authority. Reflecting on the current limitations of her role, she shared,

> Equity is forgotten about. I'm the one person who is doing everything…Overall this commitment is given lip service, but oftentimes in terms of human resources, [it's] marginalized. In terms of capacity building, there aren't many opportunities…what does an office…or the district look like if equity is embedded in everything that you all are doing?

Answering her question about what a district would look like if equity were embedded across district priorities and functions, she continued,

> On the divisional level, if we were saying that we were looking at everything through an equity lens, that means that all these conferences that we hold throughout the year…would have the same common language around equity and equity efforts…when they look at hiring practices…when they look at teacher performance, when they look at student incidences, when we redefine what discipline looks like in schools, when we look at how are we teaching and assessing learning, we would have a common [equity] practice around that. And we would bring in experts in the field, not only for the sake of professional development for teachers but also for those in central office to have an understanding and a clear vision.

Across these sections on role supports and constraints, findings illustrate that district leaders often currently design district DEI leadership roles with elevated rank but limited resources and senior-level access but limited authority. Such choices undermine the district-wide DEI impact that district rhetoric, district strategic plans, and ED role descriptions often invoke.

Equity directors themselves described the potential for ED roles to become limited, symbolic roles using phrases like "these [equity] officers are popping up in name only," while describing aspirations to move their work "beyond just these quarterly meetings." Reflecting on

her experience in a role with elevated rank and access but limited resources and authority, a Black female ED in a Western district shared, "So while there's an equity office, I do have limited resources…Oftentimes I feel brought in, [as] the kind of stamp on something, but I wasn't a part of the creation process." With resignation, she reflected, "I'm starting to feel like these [equity] officers are popping up in name only. There has to be a true deep commitment to really address structural racism." A Black female ED in a Southern district shared her desire to expand her limited impact "beyond just these quarterly meetings." She described,

> I'm a department of one. So we're in budget season, I've asked for two positions…because for me, the next round is to increase the work that's happening in schools beyond just these quarterly trainings. [Next,] it's now direct support to actually begin to implement these practices into the building, into the classrooms.

As this section explored, designing ED roles that transcend a "department of one" setup and have the capacity to support implementing equity-focused "practices into the building, into the classrooms" requires greater staff and financial resources and associated authority. So while it appears superintendents, board members, and other district leaders are increasingly attentive to what Williams and Wade-Golden (2013) refer to as the "vertical dimension" (p. 37) of DEI leader roles (i.e., elevated role rank and increasing role access), it appears district leaders have inconsistently attended to issues of resources and authority necessary for clearly defining the "horizontal dimension" of ED roles across districts. I return to this point in considering directions for future research in the context of district DEI departments.

Discussion and Conclusion

These findings provide a national portrait of ED roles in a crucial moment when many districts have recently established ED roles and roles continue to evolve. This research finds ED roles in nearly 40% of the largest 550 U.S. districts as of fall 2021 with nearly 60% of districts

represented by EDs surveyed establishing an ED role during the 2018–2022 school years. Several findings confirm prior research from Irby et al. (2021; 2022a) regarding the centrality of "equity" in role conceptions, the predominance of DEI leader roles as "director"-level roles, and limited financial and staff capacity to support such work. Other findings draw attention to increasing role ranks over time, frequent cabinet membership, the general nature of "equity" as the central role concept, roles held by inaugural leaders sometimes with no prior central office experience, and the evolving scope of ED work across districts through increasingly common DEI departments.

Findings draw further attention to how current role design choices may confine EDs to advisory role designs without the resources and authority necessary to drive impact across districts. Indeed, researchers point to how ED roles can become primarily symbolic roles (Lewis et al., 2023; Matschiner, in progress; see Chapter 2; Tichavakunda, 2021). Without increased staff and financial capacity then, researchers and EDs are clear that ED roles may become primarily symbolic roles with EDs serving as "stamp-on-something" advisors with limited ability to impact district-wide change while districts benefit from the illusion of prioritizing equity work.

Simultaneously, it is true that designing a new district role and department is a complex endeavor. Establishing a new role, much less multiple supporting staff, a standalone DEI department, points of collaboration with existing district departments, and permanent funding likely will not occur in a single year. This process will also likely include deliberate role evolution over time informed by feedback from EDs and others—"an active, contested, evolving, and hybridizing process within school districts" (Irby et al., 2022a, p. 448). While EDs were aware that district equity work "would continue to emerge," as one ED put it, acknowledging

that such work develops over time need not preclude intentional initial ED role design choices reflecting the district-wide aims of such roles. Advancing ED roles "beyond mimetic isomorphism" (Lewis et al., 2023) and toward deliberate role design and collaborative role evolution merits continued scholarship, including collaborating with EDs and centering their experiences in role design and evolution decisions.

Directions for Future Research

Among areas for future research, scholars might continue exploring EDs' perceptions of role supports and role design decisions, particularly from EDs long-serving in such roles, in pursuit of increasingly impactful ED roles. Researchers might continue to study role design and configuration dynamics, probe role clarity amid broad "equity" mandates, and produce research briefs (see Irby et al., 2022b) synthesizing role design and impact recommendations relevant to EDs and district leaders.

Another direction for future research addresses EDs' horizontal relationships and collaboration across districts. If districts begin to provide EDs with more staff and financial capacity, district leaders will need to also intentionally define horizontal relationships and associated authority dynamics in order to integrate DEI work across previously existing district units. Williams and Wade-Golden (2013) articulated this point as the imperative to "develop a new role that is fundamentally connected up, down, and across the institution" (p. 37). Thus, as district senior leaders continue to consider ED roles upward connections (i.e., who they report to, cabinet membership) and continue to build role capacity downward by increasing DEI staff that report to EDs, district leaders also need to clarify DEI-focused collaboration and integration within districts.

The work of district DEI departments, with now nearly one-third of EDs surveyed leading larger district DEI departments, provides another important area for further study. What forms of equity-focused activity and policy work are such departments most often engaged in, and with what impact? To what extent are existing equity-related efforts such as district family and community engagement work (e.g., Ishimaru, 2019) and restorative practices work (e.g., Zakszeski & Rutherford, 2021) incorporated into newly formed DEI departments? Echoing the prior paragraph, how are DEI department staff collaborating with other central office departments and school staff such as "teaching and learning" and "curriculum and instruction" departments? For example, given many districts had existing special education directors, departments, and associated staff prior to ED role design, initial analysis suggests that special education work continues outside of DEI departments in many districts while language-focused work is often incorporated into DEI departments.

Finally, researchers might continue to examine how dedicated DEI attention through ED roles and DEI departments impacts other employees' perceptions of their own equity responsibility. While this article demonstrates the need for increased resources and authority for EDs, it is conceivable that as formal district DEI infrastructure expands in many districts, other employees might feel less responsibility for such work (e.g., "equity is *their* work").

Equity directors argued that increased ED role resources and authority go hand-in-hand with building collective district DEI responsibility across all functions and roles. In fact, without such resources and authority, as one ED put it, other district employees might continue coming to sessions and saying "Oh, this is wonderful" while EDs have little capacity and authority to support "active implementation" of learning from sessions and other forms of equity leadership activity. A Latina ED in a Western district explained,

> People's mindset needs to shift from whenever they hear 'equity,' them thinking that's my job and them [instead] internalizing that wherever you're at in your own equity journey, equity is also your job and you need to try to put theory into practice instead of coming to any session that I have and telling me, 'Oh, this is wonderful.' 'Okay, great. Thank you for the affirmation. How are you then taking it and implementing it in what you're doing on a day-to-day basis,' which is the piece that I'm not seeing? I'm not seeing that active implementation.

In many ways then, ED role design decisions are the difference between "seeing that active [equity] implementation" across districts and failing to see such equity implementation.

Without intentional role design decisions that further build the capacity and authority of ED roles, roles can remain symbolic (i.e., "popping up in name only"), siloed (i.e., EDs and their work as "islands" in their district), and underresourced with EDs serving primarily as "stamp-on-something" advisors. Thus, district leaders, in partnership with EDs and researchers, should continue to examine ED role design choices in pursuit of impactful roles with the potential to dramatically improve the experiences of students of Color, LGBTQIA students, multilingual students, and other marginalized students across districts.

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CHAPTER FOUR: EQUITY DIRECTORS' EXPERIENCES OF LOCAL ANTI-EQUITY ORGANIZING AND DISTRICT EQUITY SHUTDOWN DURING THE 2020–2022 SCHOOL YEARS

Abstract

Bridging education research with scholarship on contentious politics, this article explores local experiences of P–12 anti-equity organizing over the 2020–2022 school years. To analyze local experiences of pushback against district equity work intended to better support students of Color and LGBTQIA students, I use interviews with 71 district "equity directors" (EDs) across 29 states. Exploring EDs' experiences, I analyze how together national, state, and local forms of reactive contention led to district equity "shutdown"—school board members, district leaders, EDs, and educators suspending, restricting, or eliminating district equity work in three major ways. These forms of shutdown included censoring equity-focused communication and language, eliminating district equity-focused programming or personnel, and restricting books and learning resources. Over 90% of EDs reported experiencing some form of the national movement to restrict learning about race, gender, and sexuality in their district; 40% of EDs reported at least one form of district equity shutdown; and nearly 25% of EDs reported experiences of personal intimidation. This study furthers scholarship on the politics of equity-focused district improvement with attention to how district leaders respond to opposition to district equity work.

Keywords: politics of education, restriction, censorship, equity directors, equity leadership

In the months that followed summer 2020 racial justice protests, many school districts pledged to address outcomes related to racial inequality and better support students of Color (Barnum & Belsha, 2020). Some districts committed to new action supporting students, while others renewed prior commitments to what is often referred to as "racial equity work"—promising to increase academic support for Black students and other students of Color, diversifying curricula, addressing discipline patterns harming Black students and other students of Color, and providing teacher professional development (PD) addressing race and racism (Education Week, 2021). As some districts initiated such racial equity efforts throughout the 2020–2021 school year, organizing against district equity work attempted to rebuff such efforts in the name of stopping "critical race theory" (CRT) and presumed "indoctrination" in schools (López et al., 2021; Pollock et al., 2022). As of April 2023, over 300 state-level "educational gag order" bills have been introduced in 45 states with 21 orders now law in 16 states (Young et al., 2023). Further, as of April 2023, approximately 150 school districts have adopted policies, resolutions, and statements restricting learning about race (CRT Forward, 2023).

This article examines the efforts and local consequences of opposition to district equity work during the 2020–2021 and 2021–2022 school years through the experiences of 71 district "equity directors" (EDs) across 29 states and all nine U.S. census divisions. Equity director roles are mid-level central office leaders tasked with advancing DEI (see Irby et al., 2022; Ishimaru et al., 2022; Meyer et al., 2022). Such roles began proliferating rapidly before summer 2020 protests but further increased during the 2020-2021 school year (Matschiner, in progress; see Chapter 2). EDs' experiences are significant to analyze, because EDs were often engaged in pivotal conversations regarding district responses to local anti-equity organizing, and EDs themselves oversaw initiatives targeted for restriction by local opponents. As what one ED called

"the face of equity" in school districts, further, EDs themselves have been targeted by local opponents—even receiving death threats for their leadership of district equity work, as shown later. Using interview data with 71 EDs, I answered the following research question: *How are P–12 district leaders responding to current, nationally coordinated local opposition to district equity work, with what consequences for existing equity effort? According to EDs specifically, how, if at all, did reactive, anti-equity contention drive instances of district equity-related "shutdown" locally over the 2020-2022 school years?*

This analysis builds on a previous report with coauthors (Pollock et al., 2022) analyzing national pushback to P–12 teaching and district work on race and racism, throughout the 2020–2021 school year.[5] We documented a "nationally connected, partisan-driven" (Pollock et al., 2022, p. 32) effort to restrict and censor teaching and training addressing race and racism nationally, using data primarily from school-level educators, an initial sample of 21 EDs also tapped here, and local media coverage collected throughout the summer of 2021. Building on this prior work, I too conceive of current anti-"CRT" organizing as "a national campaign made real in part through local critics of schooling enacting state and national trends…many local wildfires, one fire" (p. vii). This research extends previous findings with new data collected from central office leaders throughout a critical liminal moment—the 2020–2022 school years—as districts navigated evolving pushback to equity work, including newly passed restrictive laws and conservative efforts to "flip" school boards throughout 2021 and 2022.

This research pairs EDs' experiences of local reactive contention (Tilly & Tarrow, 2015; Wiener, 2017)—colloquially known as "pushback"—with data on district leaders' responses, to

[5] The author wishes to acknowledge *Conflict Campaign* report coauthors Dr. Mica Pollock and Dr. John Rogers for report leadership helping to shape this paper's argument, and particularly Pollock's contributions to ongoing shaping of this paper. In this prior report, we used the term EO or "equity officer" to refer to district equity leaders. "Equity officer" nomenclature reflects the title for such roles in higher education (see Williams & Wade-Golden, 2013), but such roles are most often mid-level central office "director" roles in P–12 settings (Matschiner, in progress; see Chapter 3). Accordingly, I use ED or "equity director" throughout this article.

explore instances of district "equity shutdown." By district "equity shutdown," I mean school board members, district leaders, EDs, and educators suspending, restricting, or eliminating district equity work intended to better support students of Color and LGBTQIA students. Following EDs' own analysis, I use the concept of "reactive contention" (Tilly & Tarrow, 2015; Wiener, 2017) to refer to the ways that EDs saw local community members, stoked by a larger national and state campaign, seek to challenge district equity efforts in reaction to increased district diversity, equity, and inclusion (DEI) attention following summer 2020 pledges to better support students of Color. Pointing to reactive contention targeting district equity work, one ED summarized, "The new anti-CRT movement…it's a very concerted effort to put some stops to any DEI efforts in school districts, that I think is a reaction to some of the overall support for DEI efforts in school districts."

Since 2020, such reactive contention actively contesting district and school efforts to support students has targeted an evolving group of efforts, including remote learning, masking, learning about race and racism, and policies inclusive of transgender students, connected by alleged concerns for "parents' rights" in education (see e.g., Bouie, 2023) and led by many of the same national organizations. Throughout the 2020–2022 school years, organizations including the Heritage Foundation, the American Legislative Exchange Council, the Center for Renewing America, 1776 Project Political Action Committee, 1776 Action, Parents Defending Education, No Left Turn in Education, Fight for Schools and Families, Moms for Liberty, and other groups organized parents, community members, and elected officials against district rhetoric, programming, curricular materials, and policies (López et al., 2021; Pollock et al., 2022). Conservative media has further spread these coordinated efforts. As explored throughout this article, EDs described how local reactive contention was often supported by national pressure

(e.g., anti-"CRT" talking points and "playbooks" distributed by national organizations) and state-level influence (e.g., restrictive state laws and anti-equity rhetoric from governors) and acted on by community members (e.g., electing new conservative school board majorities, seeking to intimidate EDs into ending district equity work through local death threats). This research explores such reactive contention through EDs' own experiences and crucially, also explores district responses.

Based on EDs' experiences, this article provides one of the first windows into district leaders' responses to local opposition to equity work, specifically in districts where such opposition was often strong. District leaders' responses to local opposition are significant as they often impact thousands of educators and tens of thousands of students, with educators often looking to district leaders for guidance and equity advocacy. I use "shutdown stories" from eight districts to provide a glimpse at local experiences of district equity shutdown. I draw attention to initial issues shaping district equity shutdown using these eight shutdown stories while pointing to issues for next research to examine in more depth. I do not make comparative claims across contexts.

Findings indicate how combined national, state, and local forces fueled anti-equity contention and led to district equity shutdown. Findings detail three forms of shutdown as opponents targeted district equity efforts: district actors censored equity-focused communication and language, suspended, or eliminated equity-focused programming or personnel such as PD and ED roles, and restricted books and learning resources.

This analysis builds on ED interviews with a nationally diverse group of 71 EDs representing 71 districts across the country during the 2020–2022 school years. I focus on local opponents' anti-equity contention with a primary focus on race and racism and secondary

attention to gender and sexuality (see Methods). As explored more throughout the findings, I found over 90% of EDs interviewed reported experiencing elements of the national campaign to restrict teaching about race, gender, and sexuality. Further, efforts by local anti-equity opponents led district leaders and EDs to suspend or stop at least one form of district equity work in 40% of districts. Almost one-quarter of EDs recounted personal experiences of intimidation where local opponents threatened the physical safety and job security of EDs in attempts to shut down district equity work. Finally, while future research (Matschiner, in progress) documents "success" stories of districts and district leaders protecting equity work in the face of reactive contention, this research focuses on EDs' stories of district equity shutdown (see Pollock et al., 2023 regarding a range of leader responses [e.g., supported, silenced] amid restrictive pressure).

Before exploring instances of local reactive contention and "shutdown" of district equity work, I first examine literature on the politics of district ED roles and district equity-focused reform. Then I overview theory contextualizing "reactive contention" and responses to such contention before detailing methods and data analysis. I then present findings followed by conclusions and areas for future research.

Research Questions and Literature

Analysis of EDs' experiences of local opposition to district equity work—and their take on the impact of opponents' reactive contention targeting district equity efforts—offers a timely window into how state and local politics influence district leader decision-making. Exploring EDs' experiences over the 2020–2022 school years to examine district equity-related shutdown, I asked the following:

> How are P–12 district leaders responding to current, nationally coordinated local opposition to district equity work, with what consequences for existing equity effort?

(a) According to EDs specifically, how, if at all, did reactive, anti-equity contention drive instances of district equity-related "shutdown" locally over the 2020-2022 school years?

As research is increasingly noting, EDs are key decision-makers leading district DEI work and often operate as the public embodiment of district equity work and a local lightning rod for criticism. Emergent scholarship on ED roles addresses role vulnerabilities (Irby et al., 2022), EDs' experiences of racial-gender oppression in their roles (Ishimaru et al., 2022), and ED activity more generally (Meyer et al., 2022). Researchers have less often examined how local sociopolitical contexts shape ED work: as one Black male ED in a liberal Southern suburb explained, "I'm in a constant state of political whirlwinds when it comes to this work…the politicization of equity work." Two articles to date take up this issue, while my own in-progress work examines this dynamic in the context of ED role establishment (Matschiner, in progress; see Chapter 2). Mattheis (2017) argued EDs operate as "boundary-spanning policy intermediaries" (p. 522; see Honig, 2006) navigating different interpretations of equity-focused policy. For example, in the context of state-led integration efforts, Mattheis (2017) found that EDs negotiated "implementation conflicts" based on "differing interpretations of the purpose of desegregation policies and integration funding" (i.e., "education for social justice" versus "education for economic interests"; p. 537).

More recently, Meyer et al. (2022) interviewed EDs who drew attention to "the challenges they faced due to the history and politics of their region" (p. 6) and concluded, "Although many equity directors received support from the administration and school board, the broader school community was more divided in its views about DEI work" (p. 7). EDs' experiences today reflect local climates of heightened division, exacerbated by nationally-coordinated efforts to restrict and eliminate district equity work. Related to these

findings, I document here how, in addition to community members being divided on equity work, school board members, superintendents, and even educators were sometimes hostile to equity work and initiated multiple forms of equity shutdown.

Opposition to district work intending to better support students of Color, LGBTQIA students, and other students clearly predates 2020–2022 school year pushback. Education researchers contextualize district equity efforts broadly in terms of the "racial politics" of P–12 education (e.g., Noguera, 2001; Scott, 2011; Scott & Holme, 2016)—politics playing out across issues of school funding, curricula, course access and enrollment patterns, and more. Other education researchers have long argued that local division regarding district equity efforts represents "a battle over contextual turf" (Welner, 2001, p. 223) playing out within local "zones of mediation" (Oakes et al., 1998; Renée et al., 2010; Welner, 2001). Relatedly, sociological scholarship addresses how local government organizations (e.g., school districts) advance (or, fail to advance) racially egalitarian policy (see e.g., Gooden, 2017). Many school districts, like other local government organizations, are increasingly attempting to go beyond "measuring the extent to which disparities exist" and to design and evaluate "their approach and performance in reducing social inequities" (Gooden, 2017, p. 822). This article thus adds to prior literature on the politics of district equity-focused improvement, the significance of local "zones of mediation" in shaping district equity reform possibilities, and the role of local government in potentially redressing racial inequality, while contributing to emerging research on EDs.

Driven by "white backlash to a perceived loss of power and status" (Jefferson & Ray, 2022), the national anti-"CRT" "counter-reckoning" (Jefferson & Ray, 2022) echoes historical patterns of "racial reform" followed by "racial retrenchment" (Crenshaw, 1988). As a Black female ED argued, "It's American history—a step forward, there is always a step backward."

Summer 2020 protests and demands, like those throughout the Civil Rights movement, challenged dominant "strictly color-blind policies" while attempting to advance "race-specific remedial policies" (Crenshaw, 1988, p. 1337).

The months following summer 2020 protests provided a political opportunity context (see Meyer, 2004) in which right-wing organizations and leaders sought to rebuff efforts to redress racial inequality while engaged in "issue entrepreneurship" or "mobilizing conflict on a new issue dimension" (De Vries & Hobolt, 2012, p. 247). Less than two months before the 2020 presidential election, then-President Trump's September 2020 Executive Order 13,950 targeting "offensive and anti-American race and sex stereotyping and scapegoating" ignited an issue that served to rebuff increasing national support for more racially egalitarian policy while "mobilizing conflict" in service of Republican electoral advantage (López et al., 2021; Pollock et al., 2022).

To contextualize the national movement to restrict district DEI work, I draw on theories of contested politics, specifically theory on "reactive contention." Theory on contentious politics (Tilly & Tarrow, 2015; Wiener, 2017) helps contextualize anti-equity organizing as a "contentious campaign" that emerged in reaction to increasing district equity effort—"arrays of actors, including movements, interest groups, political parties, the media, interested onlookers, and state agents" united by an opposition to district equity work (Tilly & Tarrow, 2015, p. 15). In Pollock et al. (2022), we dubbed such nationally-connected efforts a "conflict campaign" to underscore how conservative organizations, media, and politicians manufactured and stoked "conflict" nationally to mobilize people against district, school, and classroom DEI efforts.

Wiener (2017) argued that reactive contention specifically operates as "a social practice" with opponents "objecting to norms (principles, rules, or values) by rejecting them or refusing to

implement them" (p. 109). As equity efforts grew in the months following summer 2020, local anti-equity opponents pushed back against increasingly empathetic attention to the experiences of students of Color and LGBTQIA students. Opponents engaged in reactionary, public social practices "rejecting" attention to inequality and making claims on school board members, superintendents, EDs, and state legislators (i.e., demanding they prohibit discussions about gender in classrooms, end "racial bias" training, ban specific books).

EDs noted how local opponents, using organizing infrastructure initially built to contest COVID-19-related school closures and masking policy, shifted from contesting COVID-19-related policy to contesting learning addressing race and then learning addressing gender and sexuality. For example, one ED reflected, "I mean it's just one thing after another…mask mandates, the bathroom issues, banning books." Another ED added, "'Critical race theory' of course comes up as a buzzword for everything and that is hard. LGBTQ is also a hot topic right now with gender identity."

Confronted with reactive, anti-equity contention against learning about race, gender, and sexuality, how do district leaders respond? This type of question has received much less attention. Tilly and Tarrow (2015) say less about how government leaders respond to opponents' demands. Education researchers offer related work on district leaders' sensemaking in the context of curriculum and instruction decisions (e.g., Coburn et al., 2009), but more limited work addressing superintendents' or district-level actors' efforts to advance equity amid contested district climates (e.g., Coviello & DeMatthews, 2021; Kruse et al., 2018). Relatedly, management scholarship calls attention to leaders' perceptions of an organization's reputational vulnerability amid actors' claims and disruptive tactics as one factor influencing if leaders act on such claims (e.g., King, 2008). Building on such research and theory, this article seeks to explore

district leaders' potential equity advocacy and related decisions in contexts where EDs reported strong pushback to equity work. Before presenting the findings, I detail data collection and analysis methods.

Methods and Data Analysis

This research used a qualitative design to explore EDs' experiences of local opponents' attempts to restrict district equity efforts, and subsequently, district responses to anti-equity organizing locally. Analysis primarily drew on interviews, after website review across a strategic sampling of districts most likely to have EDs (see Greene & Paul, 2021) to locate districts with ED roles; emails to such districts' EDs; and finally, over 100 hours of interview data with 71 EDs working across 29 states and all nine U.S. census regions.[6] I sought to interview as many EDs nationally as possible to inform this study. I sought EDs for this sample primarily by reviewing district websites and organizational charts in all U.S. districts serving 15,000 or more students based on National Center for Education Statistics Table 215.10 data in fall 2021 (i.e., reflecting 2019-2020 school year enrollments). I did this because a prior report (Greene & Paul, 2021) indicated larger districts are more likely to have established ED roles. I located EDs in 213 (i.e., nearly 40%) of the 550 U.S. districts serving 15,000 or more students and reached out to all of them personally to see if they might be interested in participating in this research. Secondarily, I used Google search results (i.e., searches for publicly identifiable EDs using "district equity director" and "district equity officer" keyword searches) and snowball sampling methods (i.e.,

[6] Findings on the prevalence of ED roles nationally (i.e., nearly 40% among the largest 550 U.S. districts) build on prior analysis from non-peer-reviewed work published by the Heritage Foundation (Greene & Paul, 2021). Researchers (Fierros, 2022; Rice-Boothe & Marshall, 2022) have criticized this plainly partisan report, raising questions about methodological choices and unsubstantiated conclusions. The report, which argues that "CDOs do not and cannot promote equality in student outcomes" (p. 11), is part of the larger attack on district efforts to equalize educational opportunities for students of Color. I acknowledge the report here as I also analyzed ED role establishment nationally using more recent National Center for Education Statistics data.

asking EDs interviewed if they knew other EDs who might want to participate in the study) to locate additional participants.

Across all three sampling methods, I used web searches, analysis of district organizational charts and websites, and analysis of local online news sources to determine whether district DEI-focused leader roles existed in a district. I included all roles that invoked "equity," "diversity," and/or "inclusion" in the role title, with most titles ultimately included in this study combining multiple concepts. I also included role titles that invoked "equity," "diversity," or "inclusion" in combination with other concepts such as roles addressing "equity and innovation" or "equity and access." I did not include roles that did not invoke equity, diversity, or inclusion, except in the very rare case that role titles clearly suggested a focus on supporting minoritized students such as "minority achievement officer." I included district roles regardless of role rank (e.g., coordinator, director, assistant superintendent).

I attempted to contact all EDs by email or through Linkedin when an email was not publicly available. Among EDs ultimately participating in the study, I located 59 EDs based on the primary sampling method drawn from outreach across districts serving 15,000 students or more. I located 11 additional EDs using web searches and one additional ED based on snowball sampling, with these 12 willing EDs coming from districts serving less than 15,000 students.

This research then predominantly represents the perspectives of EDs working in districts serving more than 15,000 students (i.e., 59 of the 213 such EDs identified nationally, over 25% of such EDs), plus experiences drawn from EDs working in smaller districts. As ED roles are established in districts of all sizes, I supplemented national sampling across all districts serving 15,000 students or more with convenience and snowball methods in order to provide a more comprehensive understanding of ED role experiences. This sample is nationally diverse in many

ways but is not nationally representative of all U.S. districts, and I do not purport to compare small versus large districts in this study.

Across districts where I interviewed EDs, enrollments ranged from less than 3,000 students to over 450,000 students with a median enrollment of approximately 28,000 students. Per U.S. census regions, 35 EDs worked in districts in western states, 15 in southern states, 16 in midwestern states, and 5 in northeastern states. Per NCES, 43 EDs worked in "city" districts while 28 EDs worked in "suburb" districts; no EDs interviewed worked in "town" or "rural" districts. Over 60% of EDs in the sample identified as Black; over 10% identified as Latinx; and over 10% identified as multiracial (i.e., Latinx and Indigenous). Approximately five percent identified as Pacific Islander while approximately five percent identified as white. One ED identified as Asian American, one ED identified as Native, and one ED self-identified as Arab. Appendix A anonymously details each of the 71 districts where EDs worked with student enrollment, US region, NCES district locale, and the year of ED role establishment; I notate EDs by region versus state because I promised such anonymity.

Research methods included interviews and surveys with EDs (Fontana & Frey, 2005; Merriam & Tisdell, 2016). Study participation included two 45-60 minute semi-structured interviews and a survey administered using Qualtrics. In total, I conducted two interviews with 61 EDs and only one interview with the remaining 10 EDs due to ED schedules and role transitions. Interviews focused on ED role establishment, equity leadership activity, role affordances and constraints, role collaboration, and the politics of equity work locally. In interviews, I specifically followed up on EDs' responses regarding each district's local context and EDs' experiences with anti-"CRT" pushback. Interviews were scheduled with an average of four to five months between interviews; the majority of interviews were conducted between

February 2022 and June 2022. Interviews took place over Zoom or phone and were recorded using Zoom or Google Voice. Recordings were then downloaded and transcribed. The survey, which I gave EDs between interviews to allow for follow-up questions in the second interview, asked about racial/ethnic and gender identity, ED role establishment year, who EDs report to in their district, ED role location within central offices, and ED experiences of role support. Appendix C provides the interview protocol while Appendix D provides the survey. Analysis in this article almost exclusively draws on interview data, with survey data used only to provide EDs' self-identified racial/ethnic and gender identities. Survey methods and associated data are detailed in a complementary article on role design (Matschiner, in progress; see Chapter 3). I also infrequently used document analysis methods to analyze relevant sources when EDs sent me documents or local news coverage directly related to local pushback against district equity work.

While this article does not offer a structured comparison of demographic contexts, I include some such information as general context for the reader. Building on prior work with coauthors (Pollock et al., 2022), I include shorthand labels to refer to the partisan lean of congressional districts where school districts are located; whether EDs worked in districts with formally passed anti-equity restriction measures, using CRT Forward data (2023); and, when applicable, if EDs worked in states with restrictive state laws (Young et al., 2023). I attempt to show EDs' own analysis of their experiences in both state and local contexts whenever their quotes indicated this. Finally, I use NCES locales (e.g., city, suburb) and U.S. census regions (e.g., West, South) to contextualize the districts where EDs worked.

Approximately 75% of EDs interviewed worked in states where legislators had filed anti-equity bills as of April 2023, with bills now introduced in 45 states nationally. Nearly 20% of EDs worked in states with passed legislation restricting learning about race, gender, and/or

sexuality as of April 2023 (Young et al., 2023) and approximately six percent worked in districts where school boards or local county officials passed policy limiting learning about race, gender, and/or sexuality (CRT Forward, 2023).

I focus on local opponents' anti-equity contention with a primary focus on race and racism and secondary attention to gender and sexuality. EDs indicated local opponents of district equity work targeted both work supporting students of Color and LGBTQIA students. I developed interview questions in spring 2021, asking EDs about the national anti-"CRT" effort to restrict teaching about race and racism, given race and racism were the initial focus of what would become a broader effort seeking also to limit learning about gender and sexuality. Reactive contention targeting issues of gender and sexuality soon followed attacks on "CRT," often with the same groups targeting both (e.g., Florida's "Stop W.O.K.E." House Bill 7 and "Don't Say Gay" House Bill 1557 were introduced and passed in quick succession in early 2022). Thus, while interview questions in 2021 asked about race and racism-related restrictions, EDs sometimes responded by drawing connections to restrictions on teaching and training addressing gender, sexual identity, and policies intending to support transgender students (see Meyer et al., 2022 regarding ED work supporting LGBTQIA youth).

I engaged in two rounds of open, inductive coding of data (Saldaña, 2015). I first focused on EDs' experiences of a range of factors fueling reactive, anti-equity contention locally (e.g., national guidebooks with anti-equity talking points, restrictive state laws, school board testimony demanding district leaders end PD equity programming). I then conducted another round of coding examining data for instances of district reaction, including what I came to call "equity shutdown." This second round of coding focused on and ultimately identified three forms of commonly named equity "shutdown" explored in the findings. I include below some totals of

each form of equity shutdown that almost certainly represent undercounts of such instances. This research detailed such instances based on whether EDs explicitly and proactively mentioned various forms of district equity shutdown in response to general questions about current anti-"CRT" activity. Thus, as opposed to specific questions about various forms of contention locally or a survey item asking about each form of district equity shutdown, this research is limited by its reliance on general questions about anti-"CRT" pushback. Specific questions or survey items would have produced likely higher counts.

Findings explore, according to EDs, how reactionary, anti-equity contention brought about district equity-related "shutdown" over the 2020–2022 school years. Through eight shutdown stories, I use EDs' experiences to pair reactive, anti-equity contention and district reactions to provide a glimpse at how equity shutdown occurred locally. I selected these eight stories given the level of detail EDs provided about both reactive contention and shutdown and given how the stories clearly illuminated specific forms of shutdown. These eight stories provided more detail than other shutdown stories not profiled where EDs nonetheless noted that district equity shutdown occurred. ED stories from these eight districts provide a sense of how together national, state, and local pressure contributed to reactive contention locally, how district actors responded, and ultimately, three common forms of district equity shutdown. I ultimately focused on instances of equity shutdown because such shutdown risks severely restricting students' and educators' learning opportunities and efforts to better support groups long-underserved by U.S. schools. I further explored equity shutdown to add to limited research on district leaders' reactions to local reactive contention and to explore any common forms of district equity shutdown across the country.

Findings

I organize shutdown stories according to the primary form of equity shutdown that EDs detailed. EDs particularly detailed three forms of equity shutdown resulting from contention over district equity efforts: censoring equity-focused communication and language, suspending or eliminating district equity-focused programming (e.g., PD) or personnel (e.g., ED roles), and restricting books and learning resources. In total, 29 of 71 EDs described at least one form of equity shutdown occurring in their district. In total, 14 EDs reported their district suspended or stopped using equity-focused and/or race-and-racism-explicit language; 11 EDs reported their district suspended or stopped equity-focused programming or PD for educators; and eight EDs reported their district temporarily or permanently stopped using books, curricula, or other learning resources addressing race, gender, or sexuality. I analyze two stories illustrating communication shutdown, two stories exploring programming and personnel shutdown, and two stories of book and learning material shutdown. Finally, I explore two stories in which multiple forms of equity shutdown occurred simultaneously. As seen throughout these shutdown stories, EDs detailed different district decision-makers who decided to shut down district equity work: school board members, district senior leaders, EDs themselves, and school-level educators.

Shutdown of Equity-Focused Communication and Language

A Black male ED in a contested southern city shared how, in a context of nationally supported local organizing against equity work and multiple restrictive state laws—with both laws targeting P–12 schools specifically and together restricting instructional materials and training that "promotes" "specified concepts" about race, sexual orientation, gender identity, and national origin—the superintendent and ED limited equity-focused communication. The ED described the local influence of organizing coordinated by Moms for Liberty, explaining,

> There's a campaign across the country... [including] Moms for Liberty…they [local chapter of Moms for Liberty] make it a point to come to each school board meeting, and if there's anything that deals with equity or contradicts what the governor is saying, they make a point to speak on it. So we constantly have it in our face…You have an organized group that goes to all school board meetings and it is an organized approach where they all push back on critical race theory.

In addition to local organizing, the ED connected communication shutdown to multiple restrictive state laws. He shared,

> Because of the laws passed by the governor when it comes to equity, we've been trying to work around [the laws]…being careful of how we use the term *equity* in order for it to not draw unwarranted attention, unnecessary attention…You can't ignore it because it is the law. It is the legislature. The school board holds the superintendent accountable, and the superintendent holds us accountable to make sure that we're not in violation of the law.

The district superintendent and the ED himself engaged in communication shutdown. The superintendent now avoided conversations about equity, race, and gender generally while the ED reported self-censoring equity-focused language in his public communication. The superintendent was choosing to take a "let's not talk about it" approach in response to local reactive contention:

> Author: What has support or lack of support looked like from your school board and superintendent around issues of equity and racial equity?
>
> ED: Avoidance.
>
> Author: By avoidance, you mean let's not talk about it?
>
> ED: Yeah, absolutely. That's it. 'Let's limit our conversations about it. Let's not talk about it. Let's not take sides.' And we basically say, 'We're not teaching that.' But that does not stop the critics.

The ED detailed how he too censored his communication when talking to community members "currently," explaining,

> They [local opponents of equity work] want us to take the word equity out of our language, like right now we are having a conversation [and they say], 'You can talk to me, but you can't use the word *equity*.' So that is currently happening in our district…I need to find a synonym for the word *equity*.

Thus, this story illustrates how district actors responded differently to restrictive pressure, with both the superintendent and ED still ultimately censoring communication. The ED chose to limit his use of specific language—notably the word "equity"—to "not draw unwarranted attention, unnecessary attention" from local opponents, while the superintendent ceased communication about equity work more broadly, as per the ED, "politically, he [the superintendent] basically sided with the governor."

As explored more later in this section, this story provides a first indication that multiple, connected forms of shutdown sometimes occurred simultaneously. In addition to ceasing equity-focused communication, the superintendent decided to eliminate the equity department altogether in the district in 2022. The ED detailed, "Well [the department will be eliminated] because of the political, the way that the governor has defined equity as being something negative, that we need to address it differently" before concluding, "But, I don't know how you address it differently."

The need to "address it [equity work] differently" through censoring equity-focused language or even remarkably eliminating equity departments points to the range of responses district leaders considered amid restrictive pressure at multiple levels. The next story provides another example of language shutdown—this time in a district with strong local opposition in a state without restrictive legislation.

A Latino ED in a contested midwestern suburb in a state without restrictive laws described how, in a context of widespread community opposition to district work addressing race and equity, he too engaged in language shutdown.

He described persistent local contention at school board meetings targeting his work: "Every board meeting I think we've had there has been something about CRT said in it, about my office…the town I live in, it's a trip." As a result of local pressure, the ED explained, "Momentum-wise, we're [him and his staff] just being a little bit more conscious about how we do things and how it sounds…the presentation of it is gonna be a little different or skipping on certain words." Reflecting on how he believed limiting race-specific language was necessary in the current moment for preserving existing equity work while not inviting more pushback, the ED commented,

> The strategy that you have to take is a lot more low-key and consistent, even though internally, you might wanna say, 'stop doing that shit'...or 'do it like this.' You really can't because it won't stick. And not only will it not stick with staff, but the community will immediately turn their back on you. I guarantee you that if I were to start getting close to the edge of that 'CRT thing' and start talking about 'white supremacy' out here and those kinds of words, I'm telling you, I would have the mayor, I would have the police chief, I would have everybody saying 'Oh don't mess with [ED name] and his office.'

The ED elaborated that in current trainings he would not make comments such as "white supremacy is a real thing" or "you guys…are very privileged and there's a lot of people that don't have the privilege you have." He concluded by stating, "So I have to be very strategic."

This example of ED language shutdown demonstrates that, alongside the restrictive impacts of nationally-coordinated organizing and restrictive state laws, equity shutdown also occurred in districts without such laws or the obvious presence of local chapters of nationally-supported organizations. Further, this example again illustrates how EDs believed they

might protect equity work by reducing their use of specific equity-focused words and concepts targeted by local opponents—echoing the prior EDs' comment about reducing equity-focused language in order "to not draw unwarranted attention, unnecessary attention" to district equity work.

Together, these two stories draw attention to how superintendents and EDs considered different communication approaches from "skipping on certain words" to "Let's not talk about it. Let's not take sides" in response to current anti-equity organizing—with both superintendents and EDs believing that limiting equity and race-focused communication might reduce further pushback. I return to consider this dynamic later in the Discussion and Conclusion section. The next two shutdown stories illustrate district equity programmatic and personnel shutdown initiated by superintendents and school board members.

Shutdown of Equity Programming and Personnel

A Black female ED in a contested western city detailed how misleading flyers distributed by Foundation Against Intolerance and Racism (FAIR) contributed to a climate of opposition to district equity work and led community members to personally attack the ED:

> This group called FAIR they [local chapter of FAIR] are actively sending out flyers…to all union members. It was really, really gross—'Your union loves CRT.' And on the front, there's an audience of white people, white adults, and children. And there's an inappropriately dressed, overweight Black woman, like in a catsuit, and she's next to an easel that says 'All white people are evil' or 'I hate white people,' something like that. And so those flyers are showing up in our doctor's offices, it's all throughout the community. It's super saturated. So just like that, we went from nothing to within a month I got my first racist phone call and I have folks telling me 'the work you're doing is a lie from the depths of hell.'

Influenced by FAIR organizing and local media supporting conservative school board members, community members voted in four new anti-equity candidates in 2021, successfully "flipping" the school board. In interviews prior to the conservative board majority taking power, the ED

described how precarious support for equity work was and how quickly district equity programmatic and personnel shutdown could occur. She shared,

> So right now the majority is progressive and believes in the work of equity, but in November it could look really, really different…It could look like me not being here. It could look very, very different….I think the equity work will stop. So that is the immediate kind of political context.

Within six months of winning control of the school board, the new conservative majority had eliminated the ED role, eliminated the district equity department, and removed an "equity and inclusion" page from the district website. Thus, as the ED predicted, newly-elected conservative school board members executed an extreme form of programmatic and personnel shutdown by quickly eliminating all central office support for equity work. This story offers another example of how nationally-supported organizing effectively mobilized action locally, and the swift and devastating consequences of newly-elected conservative school board majorities for district equity work.

A Latina ED in a conservative midwestern city described how, in a context of a 2021 lawsuit filed against the district stemming from district PD addressing "equity" and "antiracism," the district legal counsel dictated total programmatic shutdown. Plaintiffs—two district employees who took part in PD sessions in 2020—alleged that the training violated their First Amendment rights by compelling particular speech and discriminating against their viewpoints. The lawsuit sought both monetary compensation and a permanent end to the training. The lawsuit named the ED and another staff member who led the training and was ultimately dismissed by a judge who referred to the claims against the ED and another staff member as "frivolous."

The ED described how the lawsuit nonetheless led to the district legal counsel ending multiple equity-focused programs, explaining, "The litigation…because they're saying it [training for educators] was violating these things, it was told to us [district equity staff] that we just can't move forward…literally, I can't do certain things because our legal counsel has made recommendations [against those things]." More specifically, she shared, "Our legal counsel has been creating barriers all over the place…right now it's like navigating through barrier after barrier."

The ED detailed how district leaders stopped much-needed educator training addressing support for LGBTQIA students. She commented,

> Right now we can't move forward with our mandatory trainings. We were supposed to do our mandatory trainings this school year…we couldn't because of the litigation. We were actually gonna start on LGBTQ+ 101 training because that's another population in our district that I don't feel gets the support that they need…I've had principals ask me what the alphabet means in 'LGBTQ,' like really foundational learning even though we've done some training for that for our principals. But this was gonna be districtwide.

She further described how shutdown extended to programming intended to support a more diverse teacher pipeline. She explained that current litigation created a ripple effect where the senior district leaders were worried the lawsuit would "cause more litigation": "If anything that [lawsuit] makes people think, it's going to cause more litigation…to create a grow your own [teacher] program is—we're getting comments about the questions we're asking even though they're the most basic questions about DEI."

This story of programmatic shutdown enacted by district leaders is notable as a single lawsuit that was ultimately dismissed, nonetheless halted PD intended to support LGBTQIA students and an initiative attempting to diversify the district teaching force, among others, for nearly a year. This story is further notable as it illustrates how school-level educators, in addition

to senior district leaders, school board members, and EDs, shut down or attempted to shut down district equity work. While many EDs across this data described educators reaching out to them for guidance regarding if or how to adjust their instruction based on new restrictive state laws, two educators in this story sought to proactively further district equity shutdown by suing their own district.

Together, these two programming and personnel shutdown stories are notable for how they illustrate near-total and often immediate district shutdown enacted by school board members and senior district leaders. As a result of such shutdown, virtually all "equity" programming was ended in the first district while the ED in the second district argued that educators across the district lost the opportunity to engage in "really foundational learning" regarding support for LGBTQIA youth while the district suspended an effort to recruit more diverse educators. The next two shutdown stories illustrate district book and learning resource shutdown initiated by district leaders and school board members.

Shutdown of Books and Other Learning Resources

A Black male ED in a contested western city detailed how, in a context of hostile conservative media coverage influencing community members, including school board members, board members executed book and learning resource shutdown.

The ED summarized the impact of national conservative media on local equity work: "It's…the conservative media that trickles into the people's mindset that then spews out of their mouth…I…get clumped into whatever the narrative is in the media about this [equity] work." More specifically, he detailed how a "political television show" turned community members, including board members, against district equity work by priming them to identify local efforts to "brainwash us" or "indoctrinate us":

> You can have a conversation with someone, explain to them what equity, access, and inclusion is…They're all with it. 'Yes. I love that. That's a great idea.' And then a week later they watch some political television show and then they were like, 'Oh see, no, you're trying to brainwash us' and all this stuff. 'You're trying to,' the most interesting one I got is, 'you're trying to indoctrinate us.'

The ED noted how school board members influenced by critical media coverage turned on district equity work and ultimately enacted learning resource shutdown.

In 2021, a majority of school board members voted against renewing an online, supplementary learning platform due to the platform allegedly providing, what one community member called "biased materials and stories," during school board testimony. The ED shared that board members told him, "You're trying to support this propaganda." The learning platform, used by many districts across the country, is in fact intended to supplement district curricula with articles on current events and related questions and is not affiliated with a partisan organization. The ED concluded by pointing out the swift change in board member support for district equity work over the last three years: "Like really, that's what you really think about me?! [I'm trying to support propaganda], Because when you appointed me [to the ED role in 2019-2020], you didn't think that." This story again illustrates the power of conservative school board majorities and the considerable scope of learning material shutdown—in this case, a curricular supplement with thousands of resources used by students in multiple grades. The next story details book censorship based on a single, passing reference to the Black Lives Matter movement in the context of the Civil Rights movement.

A Black female ED in a contested southern city shared how multiple state laws—with both laws targeting P–12 schools specifically and together restricting instructional materials and training that "promotes" "specified concepts" about race, sexual orientation, gender identity, and national origin—mobilized local efforts to restrict access to texts: "So we had people that came

with book lists and wanted to get in schools and look through the books and fill out all these book lists." Asked what was driving local attempts to restrict books, she responded simply, "It's that state legislation."

The ED explained how district leaders, in partnership with state DOE staff, decided to ask a publisher to remove a reference to the Black Lives Matter movement from a vocabulary book used in elementary classrooms due to local pushback. She detailed,

> Four weeks ago, there was the mention in a text, one of our newly adopted texts, a vocabulary lesson for fifth graders [in an] advanced course…And they [the texts] were telling a story about one day they [child in the text] and their dad went to a Black Lives Matter protest. And it [local pushback] just went from there…there was backlash…saying, 'We need to look at all the books'…It really wasn't an issue…It wasn't written as a fact…they were just talking about what happened when they went to this protest. They talked about the Civil Rights movement, and it seemed that the father was explaining it to the son…it just didn't make any sense, but that's what they [anti-equity community members] did [target the text for restriction].

She proceeded to explain that as a result of local contention targeting the text and in light of the restrictive state laws,

> The district got together with DOE and curriculum people and they decided that they would, along with the book manufacturing [company], they changed the verbiage in there [the vocabulary book]…It was a meeting between the superintendent, the directors of curriculum, the Department of Education, and the attorney, and they felt that the best thing was to remove that sentence.

This story of book censorship draws attention to how restrictive state laws can both mobilize local opponents of district equity work and contribute to local and state leaders taking restrictive action—in this case, deleting a reference to a social movement advocating for equality and justice for Black communities. Together, the two stories in this section are notable as they illustrate how national conservative media attacking district equity work and restrictive state laws activated local actors who then brought about book and learning resource

shutdown—shutdown ranging from a single sentence to an entire curricular supplement with thousands of resources.

Multiple Forms of District Equity Shutdown

Two final shutdown stories illustrate multiple forms of district equity shutdown occurring simultaneously. A Black female ED in a contested western city described how, in a context of a state law—targeting P–12 schools specifically and banning "instruction that presents any form of blame or judgment on the basis of race, ethnicity or sex"—and local personal intimidation, district senior leaders and educators engaged in multiple forms of shutdown. Asked to clarify the timing related to restrictions on equity work in her district, an ED explained that equity work ended,

> When an assistant superintendent came to my office and said to me, '[ED name] oh, the [state] CRT law. Equity is over for this year. Just find things to do.'...It stopped when we had a calendar for the [racial equity] lecture series and they're asking me for all the presenters to share their PowerPoint before coming. I'm like, 'What?' That's a level of policing I'm not comfortable with…So that's when the work stopped…everything just stopped…things came to a screeching halt.

Thus, senior district leaders dictated equity shutdown they attributed to the restrictive state law, bringing multiple equity-focused initiatives "to a screeching halt." The ED described how programmatic shutdown also included a "six-hour PD for all [district name] employees, part of our onboarding process" focused on supporting diverse learners that was "stopped," as a result of local pushback and a direct mandate from her assistant superintendent.

In addition to a restrictive state law, the ED called attention to the role of local community members targeting equity work through direct threats against the ED, and local organizing. She shared, "I was getting death threats…death threats on social media…I get threats, whether voicemail or email sent to me. I am seen as a 'threat to democracy.'" She further

described how local organizing against equity work contributed to a climate where local opponents succeeded in "pushing equity away" when senior district leaders chose to stop equity work for the year:

> In the beginning, there was still pushback, but earlier on, we had this very inclusive group of White parents, Black parents, Latino, Asian, LGBTQIA, and all of their parents coming together as a group promoting equity, they come to every board meeting. [More recently] they have a band of Republican parents who came more against the work. So it's kind of been very divided, but this past year, they appear to have 'won' in terms of pushing equity away.

The ED further explained how some district librarians initiated book and learning material shutdown by refusing to accept books with protagonists of Color and LGBTQIA protagonists. She shared that librarians in her district "sent the books back to me because it says 'woke' or it's about Thurgood Marshall saying 'I might use the system to make change.' And I'm like, 'sending the books *back*?" In response, the ED asked, "Well, don't you have Black kids in your building? Or Latino kids in your building? Or Asian kids…We have kids who have two moms, [we] have kids who have two dads. We have kids who are transgender and they're here and they have a right to be here. They have a right to see themselves in books and the library in your building."

This story is notable as it provides another example of how a state law restricting learning about race, ethnicity, and sex directly led senior district leaders to end multiple forms of equity work. With restrictive laws passed in 16 states, such state-driven censorship now risks limiting equity programming and learning opportunities for hundreds of thousands of students across states with such laws. Finally, this story provides another example of school-level educators themselves restricting learning about social differences and opposing diverse representation in

books. The final story similarly analyzes multiple forms of shutdown driven by national-state-local reactive contention.

A white female ED in a contested western suburb described how, in a context of nationally supported local anti-equity organizing and horrific threats against her and her family, community members "flipped" the school board and new board members carried out programmatic and personnel shutdown. The ED detailed how national influence through the "Christopher-Rufo-kind-of guidebook things that are going around" fueled local contention. She explained,

> I think politics is the number one thing that undermines our work, and the connectedness that we have in our system to the powers that be—to the Christopher Rufos of the world. I hear quotes from that playbook every day, so people are using it, they know about it. They're very well educated in how to fight the [equity] work, and I think it comes down to politics.

The ED characterized local opposition to district equity work by saying, "They're very powerful. They have a lot of funding and it's very well organized."

The ED explained how local opponents of equity work "flipped" the school board in 2021 and quickly moved to execute programmatic and personnel equity shutdown. The new conservative board majority put stops to a range of district equity programs, including firing the superintendent who was publicly supportive of district equity work, ending a professional learning pathway for district educators focused on equity, and passing a board resolution condemning equity programming spelled out in the district strategic plan and equity policy. She detailed,

> All of the CRT/anti-CRT conversation and arguments have really derailed a systemwide approach to equity work…Most of the educational equity next steps in our strategic plan are paused…We also had…a professional learning pathway [on "equity-focused topics"] with a group called [name redacted] and that was actually stopped…We are now working very much through English Language Development because that is where we have the most support. And right now without a superintendent, every single day is an interesting

> conversation because my position is hated by our board of education…Along with terminating the superintendent, they [new board members] have posted a resolution that directs the [new] superintendent…to propose changes to the [existing equity] policy...The [board's anti-equity] resolution statements are very much directly opposing some of the statements in our equity policy.

The anti-equity resolution, passed in 2022, rejected the significance of "group identity" in district instruction while stating that district instruction should honor America for its commitment to prosperity, individual freedom, and equality of opportunity.

Attempting to preserve remaining equity efforts, the ED added that she and district leaders deliberately attempted to avoid inviting further reactive contention by engaging in communication and programmatic shutdown amid further nationally connected local opposition. She shared, "We have some very powerful organizations [in the area], including Proud Boy leaders and Koch brothers and others who are very much against this work and put a lot of money into being against this work." The ED explained that district leaders thus encouraged programmatic restriction, saying generally, "Oh no, you don't wanna do that. It'll cause too much of a firestorm. So don't do that."

The ED also shared that death threats against her and her family understandably made it difficult to "make any forward progress" on district equity work and specifically detailed her own communication shutdown intended to "lower the temperature" amid horrific threats. She detailed,

> I was getting threats of harm through voicemail or through email, people saying that 'if you talk to my child, we will find you and either kill you or hurt you or find your kids,' things like that. So that piece is very hard, especially when I'm a member of our community…Whether it's [threats of] harm or job security or death… we're used to difficult conversations—but you can't actually make any forward progress if you're being threatened.

The ED explained how she and other district educators were starting to censor previously used equity and race-specific language in training and general communication. She shared, "In [name] County it's very difficult to say 'diversity' or 'equity' without a conservative backlash…We do avoid saying *privilege* because it's such a trigger word in our community." Thus, attempting to preserve limited, remaining equity work, the ED reduced her use of equity-focused language while district leaders proactively encouraged her to avoid any new equity efforts.

This story demonstrates how national and local reactive contention contributed to conservative community members flipping the school board and enacting widespread equity shutdown, including firing a superintendent and passing a resolution condemning equity efforts. Further, this story draws attention to how district leaders and EDs engaged in programmatic shutdown and language shutdown in attempts to reduce district vulnerability to further opposition targeting equity work. While earlier stories addressed this dynamic in the context of communication shutdown (i.e., "skipping on certain words" in hopes that it might reduce pushback), this story illustrates how senior district leaders categorically shut down future equity-focused programming in addition to equity-focused communication.

ED Reflections on District Equity Shutdown

Across shutdown stories, EDs themselves consistently described attempting to strategically navigate local shutdown pressure and continue district efforts to better support students of Color and LGBTQIA students. One ED shared, "So we have to tread very lightly, but at the same time, we can't not protect our students. And so that's kind of the game we're playing right now." Another ED added, "You play this fine balance of trying to make sure you don't get this person [superintendent supportive of equity work] fired by pushing the envelope too much, but not watering down what you do to not even do the work. So it's a fine balance."

While working to preserve district equity efforts amid local opposition, EDs drew attention to the serious consequences of such shutdown for students and teachers. One ED summarized, "It's gonna harm students of color and our other marginalized kids. And that piece I think is very critical." A second ED shared, "It's hard because, at the end of the day, I feel like we're bending over to the whims of the opposing side, which means it's hurting our students and our staff." A third ED elaborated on the consequences of district equity shutdown for educators, arguing that restrictive state laws specifically would "push some of our great educators out of the school system" because, as he argued, "I don't know if conscientious teachers are able to just say, 'Okay, well, I can only tell half the story' and be okay with it."

Despite common experiences of equity shutdown, EDs shared that many teachers in fact recognized the need for district equity efforts. One ED shared, "Teachers are saying to me, 'We need this work.' They're asking for it." Another ED added that community members criticized district leaders' responses to equity shutdown such as removing books from schools, with community members asking, "What are you gonna do now? Everything they [critics] say, you're gonna remove from books?"

Targeted by local attacks on district equity work, EDs largely remained resolute in their commitments to students and educators. A Black female ED summarized her commitment in the face of near-constant attacks from community members: "They send the emails, 'Shut it down, shut our equity down in [district name].' And I'm like, 'Shut it down?' I'm not gonna go anywhere. I am here until I retire." Equity directors' "I'm-not-gonna-go-anywhere" resolve merits recognition as does their leadership in this pivotal moment for district equity work.

Discussion and Conclusion

This article adds to research on the current national movement to restrict and end schooling efforts supporting students of Color and LGBTQIA students in P–12 education. Exploring EDs' experiences throughout the 2020–2022 school years, this article analyzed how together national, state, and local forms of reactive contention led to district equity "shutdown"—school board members, district leaders, EDs, and educators suspending, restricting, or ending district equity work—using shutdown stories from eight districts. Findings demonstrate how reactive contention targeting district equity work led to three common forms of equity shutdown: censoring equity-focused communication and language, suspending or eliminating district equity-focused programming such as PD, and restricting books and learning resources. These eight stories offer glimpses into larger national patterns, with EDs in 29 of 71 districts reporting (unprompted) at least one form of district equity shutdown and EDs in 12 of 71 districts reporting (unprompted) more than one form of district equity shutdown.

EDs' shutdown stories illustrated how multiple sources of national, state, and local restrictive pressure and a range of local contentious practices contributed to district equity shutdown. Among sources of restrictive pressure, nationally supported local organizing, conservative media attacks on district equity work, and restrictive state laws often fueled local contention seeking to end district equity efforts. Among local contentious practices, local actors consistently turned out community members to testify against district equity work at school board meetings; ran for and "flipped" school boards; campaigned to remove specific books and learning resources from district classrooms, libraries, and websites; attempted to intimidate EDs through death threats; and filed a lawsuit against district equity staff members. EDs' shutdown stories called attention to two specific sources of restrictive pressure and one contentious practice

that consistently led to sweeping equity shutdown. Such sources of pressure included *restrictive state laws* discussed in three of the shutdown stories and a *lawsuit* filed against a district detailed in one shutdown story. One contentious practice specifically led to district equity shutdown consistently: *conservative community members running for and "flipping" school boards*.

Data indicate that district actors moved to shut down equity work for a range of reasons: fear of legal consequences amid state censorship laws, caving to local pushback or the fear of further pushback, fears for personal and familial safety, strategic efforts to protect equity work by reducing equity-focused language specifically known to draw pushback, and in some cases, ideological agreement with restriction. These reasons point to ongoing issues deserving attention, including, consistent conflict over a similar set of equity-focused concepts in districts across the country; the role of public messaging from senior district leaders potentially defending equity-focused work and its benefits; the extent to which self-censoring equity and race-focused language potentially undermines district efforts to serve students of Color and LGBTQIA students (see Pollock et al., 2023); and the potential reality that, regardless of what language district leaders use or what words they limit, attacks against district equity work and EDs will likely continue given the political utility of such attacks for Republican candidates (see e.g., De Vries & Hobolt, 2012).

Consistent with prior findings drawing attention to how pushback to district equity work is particularly common in politically-contested districts (Pollock et al., 2022; Rogers et al., 2023), it is notable that seven of the eight districts profiled in these equity shutdown stories—which themselves represent districts where EDs talked more thoroughly about shutdown experiences—were in politically contested congressional districts. EDs themselves called out the influence of contested partisan climates on district equity work. For example, a Black female ED

summarized, “So we are a microcosm of our community, right here in the district. So our community is about a 50–50 on everything district…So that is just an ongoing thing that you recognize [in leading district equity work].”

Equity directors’ shutdown stories, building on prior research on the politics of district improvement, draw further attention to the central role of “political” and “normative” factors in district equity-focused improvement work (Oakes, 1992) and how contested partisan climates in the current moment likely contribute to more challenging local “zones of mediation” (Oakes et al., 1998). Researchers then might continue to explore district equity work and leaders’ equity advocacy (or lack thereof) in contested districts (see e.g., Coviello & DeMatthews, 2021), districts with local restrictions, and districts in states with restrictive laws.

Findings also draw attention to the precarity of district equity work currently despite significant equity commitments from many senior district leaders less than three years ago in the wake of national racial justice protests. District equity shutdown represents the second of two waves of rapid political mobilization—first in support of district equity work and ED role establishment (see Matschiner, in progress; see Article 2), and next in opposition to such work.

Reactive anti-“CRT” contention against district equity work rapidly followed districts’ summer 2020 equity commitments and efforts, with district equity shutdown suspending, restricting, or eliminating a variety of recently-initiated equity efforts established following summer 2020 protests—including eliminating ED roles and equity departments altogether. Such “racial policy whiplash” (Mayorga & Bradley, 2023, p. 126) across educational contexts over the last three years, demonstrates the precarity of recent steps to center equity in districts and draws attention to how organizations such as school districts are often a battleground for differing movements’ competing claims and demands. As a previously-quoted ED whose role was

eliminated by a new conservative school board majority, stated, “Right now the majority is progressive and believes in the work of equity, but in November it could look really, really different.” Her ED role, which was established with community support in early 2020–2021, was eliminated less than two years later. Researchers then might explore cases where district and school leaders successfully protected recently established equity efforts and DEI-focused roles amid local pushback. Relatedly, researchers might also continue to explore how such rapid shutdown contributes to educator burnout and turnover (see Jayakumar & Kohli, 2023) and how educators and students organize to protect equity work.

Finally, findings raise questions about which stakeholder concerns district leaders prioritize when determining how to respond to local opposition. Multiple EDs drew attention to how conservative, often white parents who opposed district equity work appeared to drive equity shutdown despite other community members and educators supporting such work. An ED who detailed multiple forms of district equity shutdown in her district, shared: “There’s still this big roadblock that says, ‘We’re doing whatever makes the white people feel comfortable. We’ll move as much as…they’re still comfortable...They [senior district leaders] will start, and white folks will get offended, and they will stop.” This reflection suggests that district leaders’ “policy responsiveness” (see Berkman, 2005) on issues of equity may be driven by conservative, often white community members opposed to district equity work. On this issue, Pollock et al. (2023), argued, “The phenomenon of bending to a highly vocal minority…demands deep reflection today” (p. 47). Researchers then might continue to explore the extent to which district leaders are “bending to a vocal [often white] minority” when enacting district equity shutdown.

Courageous leadership from EDs, and other individual education leaders, is necessary yet ultimately limited in the face of a national movement to restrict learning about race, gender, and

sexuality. Within school districts, coordinated resolve and messaging protecting equity work is needed as are investments in district equity leadership capacity that builds distributed, district-wide equity capacity across schools and district units (see Galloway & Ishimaru, 2020). More broadly, sustained national and state organizing beyond powerful but limited summer 2020 mobilization is also required to build and sustain coalitions that more consistently exert power locally in support of district equity work. Together, such efforts can support the necessary work of protecting and advancing district equity efforts amid pushback while supporting students of Color, LGBTQIA students, and other minoritized students in districts across the country.

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CHAPTER FIVE: CONCLUSION

I conclude with a summary of each chapter before considering ED roles in the context of foundational educational improvement literature introduced in Chapter 1. I then synthesize areas for future research from across chapters.

Exploring ED role *establishment*, Chapter 2 analyzed how combined insider and outsider activist pressure catalyzed ED role establishment in districts across the country. Equity director roles rapidly proliferated nationally over the 2018–2022 school years, with 60% of EDs across this research reporting their district established an ED role during the 2018–2022 school years.

Examining ED role *design*, Chapter 3 addressed ED role and leader characteristics and common ED role design dynamics. "Equity director" role designs were most common across EDs surveyed and most often held by Black leaders and women of Color, with EDs indicating in interviews how elevated role ranks and access to district decision-making supported ED work while limited resources and authority constrained ED work.

Addressing the *politicization of district equity work* over the 2020–2022 school years, Chapter 4 analyzed how connected national, state, and local restrictive pressure targeting district equity work led to district "equity shutdown"—school board members, district leaders, EDs, and educators suspending, stopping, or restricting district equity work—in eight districts nationally. Across my sample, roughly 40% of EDs reported that their district suspended or stopped some form of district equity work during the 2020–2022 school years, while eight shutdown stories illuminated how reactive contention drove equity shutdown in the form of ending district programming, restricting books and learning resources, and censoring equity-focused communication and language.

Revisiting Foundational Literature

Historically, districts have paid limited attention to their role in perpetuating inequality, with Rorrer et al. (2008) arguing, "Only recently has maintaining an equity focus become prominent as an explicit value in reform implementation or research focus" (p. 328; see also Noguera & Pierce, 2016; Trujillo, 2016). Synthesizing research on district reform, Rorrer et al. (2008) argued, "Districts can, and have historically, institutionalized inequity" while, at the time of their review, finding "a modest collection of research" (p. 329) on district reform efforts with an explicit equity focus.

District leaders have often undertaken DEI work through limited interventions (e.g., heritage month celebrations, isolated book groups) and temporary reform initiatives (e.g., a single year of professional development) with such work often led or supported by external consultants and researchers as opposed to district staff (see Matschiner, 2022; Singleton, 2018). Accordingly, Singleton (2018) argued district leaders have often engaged in "event- and incident-driven piecemeal approaches" to DEI work (p. 31).

District leaders' establishment of ED roles and often broader internal district DEI infrastructure signal important efforts to institutionalize "equity work" beyond limited "piecemeal approaches" (Singleton, 2018, p. 31) to district DEI work. The elevated rank and access of ED roles, including often cabinet membership, expanded district DEI infrastructure through increased staff capacity and standalone DEI departments, and a central focus on racial equity among district leaders are increasingly common across U.S. districts. District leaders have increasingly prioritized a focus on race and how districts further racial inequality and continue to build out dedicated district infrastructure to support racial and other forms of equity work. In sum, district leaders' "turn to 'equity' marks a search for different results [than prior efforts]"

(Minow, 2021, p. 171) with district "equity" commitments representing an "expansion and escalation of reforms tethered to a [new] value commitment" (Rorrer et al., 2008, p. 334) and newly established district ED roles tasked with overseeing such commitments. District leaders in many districts have thus institutionalized equity value commitments through ED roles and other efforts such as equity policies and school-based equity teams within districts in hopes of better supporting marginalized students and students of Color in particular.

Equity director roles, along with related district DEI staff and district DEI departments, potentially provide structures of support and infrastructure for equity-focused, capacity-building work long called for by researchers. Such DEI infrastructure potentially provides a "structure of support for [equity] implementation" (Payne & Kaba, 2007, p. 33) within districts. As many educational reforms "fail" due to limited or temporary implementation support (see e.g., Payne & Kaba, 2007), a dedicated DEI support structure inside districts represents a promising organizational development aligned with prior work on educational improvement and reform. Research would deem such increased support necessary not only for initiating a range of equity-focused improvement efforts, but for the ongoing work of coordinating, supporting, and sustaining equity improvement efforts across district systems (see e.g., Coburn, 2003).

Increasing district DEI infrastructure is also aligned with research findings demonstrating the central role of "capacity building" when attempting to spread improvement across educational systems. Bryk et al. (2015) argued that often, "Districts and states lack the individual expertise and organizational capacity to support these changes [large-scale improvement efforts] at scale" (p. 5). Intentionally designed ED roles and broader equity infrastructure potentially provide leadership for ongoing equity-focused capacity-building work for employees across district units. Building equity-focused capacity among educators, school administrators, service

staff, paraprofessional staff, and central office leaders is necessary as DEI staff alone, particularly single EDs, cannot carry out the full scope of DEI improvement work called for within districts. Scaling district DEI work across district systems is necessary if district DEI leaders are to integrate DEI commitments and DEI ownership across all district units and functions (see e.g., Coburn, 2003; Spillane & Thompson, 1997). Williams & Wade-Golden (2013) called attention to this reality—to achieve desired organization-wide DEI impact, "equity work" must become an "integrative" priority (p. 78). Such integrative work in P–12 districts likely involves integrating equity commitments across other key district units, including teaching and learning departments, student support services departments, human resources departments, facilities and transportation departments, and more. Ironically, district senior leaders are often initiating district DEI work by establishing a single role (i.e., ED roles) tasked with integrating equity commitments and efforts across all district units.

Recent research (e.g., Galloway & Ishimaru, 2020; Irby, 2021), building on education reform and capacity-building scholarship, provides insight into developing, what Irby (2021) called, "capacity for racial equity improvement" (p. 4) across schools and districts. Like other district improvement efforts, efforts to build "capacity for racial equity improvement" face challenges. In addition to recent conservative pushback against district equity efforts detailed in Chapter 4, findings from educational improvement literature draw attention to other inherent challenges. For example, educators often prefer to "graft new approaches onto existing practices without altering classroom norms or routines" (Stein & Coburn, 2008, p. 586). This preference is particularly concerning in the context of district racial equity work. Researchers (e.g., Lewis & Diamond, 2015; Tyson, 2011) continue to document how district and school practices and routines further racially stratified outcomes. Thus, even with ED and other DEI staff support,

educators' proclivity for grafting "new approaches onto existing practices" without restructuring such practices continues to make district DEI efforts inherently challenging.

Implications and Directions for Future Research Drawn from Across the Dissertation

Connected to building district capacity for racial equity improvement, the breadth of "equity" as a central organizing concept and differing conceptions of "equity" (even among supporters of such work) are issues meriting further scholarly attention. Specifically, scholars might continue to examine how educational leaders, including EDs, district senior leaders, and principals, conceptualize "equity" commitments in their daily work. Researchers might continue to examine how leaders' conceptions of "equity" influence their approaches to building district and school-level racial equity capacity and inform broader equity-focused theories of change (see e.g., Ishimaru & Galloway, 2021). Such research is likely best informed by studies of district equity work over multiple years and across multiple districts to explore the full range of "equity work" pursued by district leaders, how "equity work" likely differs across district contexts, and the ultimate impact of such work over time. For this dissertation, I chose first to lay the groundwork for such future analysis by looking nationally at the recent creation, design, and current experiences of this newly-widespread role. I intend to build on this initial study through subsequent analysis of ED work, including work probing EDs' conceptions of equity and the impact of these conceptions in ED work over time.

This dissertation drew attention to the significance of context, both organizational and sociopolitical, in leading district racial equity work. Chapter 2 findings pointed to the role of "insider activists" within organizations in catalyzing the establishment of ED roles, the role of superintendents in prioritizing and accelerating such establishment, and district leaders' responses when pressured to address racially disparate organizational outcomes harming students

of Color. Chapter 3 pointed to the significance of deliberate ED role design and invites broader questions about organizational design in the context of elevating ED roles and attempting to scale DEI work across district units. Despite increasing district infrastructure intended to support racial equity work, racialized organizational routines (e.g., racialized resource patterns, informal practices often advantaging white staff) still will likely undermine such efforts (see e.g., Ray, 2019; McCambly & Colyvas, 2023). Thus, researchers might continue to explore how organizational contexts, organizational logics, and organizational routines both support and constrain efforts to redress racial and other forms of inequality (see e.g., Rigby, 2014).

Findings across this dissertation also pointed to the significance of local sociopolitical contexts in shaping district equity work. Chapter 2 illustrated how local incidents of racism and community coalitions increased pressure on district leaders to establish ED roles, influencing where and when ED roles were established. Chapter 4 further illustrated how local organizing and pressure, this time in response to increasing district equity efforts, led to district equity "shutdown" that EDs described in nearly 40% of districts where EDs worked—itself likely an undercount since EDs were not asked explicitly for shutdown stories. Findings in Chapters 2 and 4 also called attention to how varying national and state-level actors and organizations, in combination with local sociopolitical contexts, spurred ED role establishment through corrective action mandates (i.e., Chapter 2) and later galvanized anti-equity organizing across the country (i.e., Chapter 4). As addressed in Chapter 4, researchers might continue to examine district racial equity work specifically in politically contested contexts and contexts with official state or local restrictions—a growing phenomenon.

Findings also invite questions related to ED role impact. This initial effort to analyze ED roles references forms of ED activity in Chapter 4 (e.g., leading PD, supporting

"grow-your-own" teacher programs to increase teacher diversity), but did not set out to analyze common equity leadership activity engaged in by EDs or the impact of such activity. Research on higher education CDO roles (Leon, 2014) points to common strategies used by CDOs (e.g., communication, educational, and accountability strategies), but research on P–12 EDs is very limited in its examination of ED strategies, activity, and potential impact. Such activity and potential impact are important topics for next research—questions again likely best answered with longitudinal studies across multiple districts. Again, I laid an initial foundation with this dissertation by examining ED roles nationally, and I look forward to future work analyzing common forms of equity leadership activity and the potential impacts of such work on both students and educators.

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Appendix A

District Details and ED Role Establishment Year

District Size	District Locale per NCES	District Region per U.S. Census	ED Role Establishment Year
Large	City: Large	West	2005-2006 SY
Large	Suburb: Large	South	2014-2015 SY
Large	Suburb: Large	South	2005-2006 SY
Large	City: Large	South	2014-2015 SY
Large	Suburb: Large	South	2005-2006 SY
Large	City: Large	West	2020-2021 SY
Large	City: Large	South	2012-2103 SY
Large	City: Large	South	2015-2016 SY
Large	Suburb: Large	South	2013-2014 SY
Large	Suburb: Large	West	2015-2016 SY
Large	City: Large	South	2018-2019 SY
Large	City: Large	South	2016-2017 SY
Large	Suburb: Large	West	2018-2019 SY
Large	City: Large	West	2015-2016 SY
Large	Suburb: Large	West	1996-1997 SY
Large	Suburb: Large	West	2018-2019 SY
Large	Suburb: Large	South	2017-2018 SY
Large	City: Large	Midwest	2019-2020 SY
Large	City: Large	Midwest	2020-2021 SY
Large	City: Large	West	2018-2019 SY
Large	City: Large	West	2019-2020 SY
Large	City: Large	West	2017-2018 SY
Large	City: Small	South	2021-2022 SY
Large	City: Mid-size	West	2017-2018 SY

Large	City: Small	West	2013-2014 SY
Large	City: Large	West	2020-2021 SY
Large	City: Large	West	2018-2019 SY
Large	Suburb: Large	South	2020-2021 SY
Large	Suburb: Large	West	2016-2017 SY
Large	City: Large	West	2017-2018 SY
Large	Suburb: Large	Midwest	2012-2013 SY
Large	City: Small	West	2020-2021 SY
Large	Suburb: Large	West	2018-2019 SY
Large	Suburb: Large	Midwest	2019-2020 SY
Large	City: Mid-size	West	2019-2020 SY
Large	Suburb: Large	South	2015-2016 SY
Large	City: Mid-size	Midwest	2021-2022 SY
Large	City: Mid-size	South	2019-2020 SY
Large	City: Mid-size	West	2021-2022 SY
Large	City: Large	West	2020-2021 SY
Mid-Size	City: Small	West	2018-2019 SY
Mid-Size	City: Midsize	Midwest	2019-2020 SY
Mid-Size	Suburb: Large	West	2020-2021 SY
Mid-Size	Suburb: Large	West	2020-2021 SY
Mid-Size	City: Large	Midwest	2018-2019 SY
Mid-Size	City: Mid-size	West	2012-2013 SY
Mid-Size	Suburb: Large	West	2021-2022 SY
Mid-Size	Suburb: Mid-size	West	2021-2022 SY
Mid-Size	Suburb: Large	West	2021-2022 SY
Mid-Size	City: Mid-size	West	2013-2014 SY
Mid-Size	City: Small	West	2020-2021 SY
Mid-Size	City: Mid-size	West	2020-2021 SY

Mid-Size	Suburb: Mid-size	South	2010-2011 SY
Mid-Size	City: Mid-size	Midwest	2017-2018 SY
Mid-Size	Suburb: Large	West	2021-2022 SY
Mid-Size	City: Mid-size	West	2016-2017 SY
Mid-Size	City: Mid-size	Midwest	2019-2022 SY
Mid-Size	City: Mid-size	Midwest	2018-2019 SY
Mid-Size	Suburb: Large	Northeast	2021-2022 SY
Mid-Size	Suburb: Large	Midwest	2019-2022 SY
Small	Suburb: Large	Northeast	2020-2021 SY
Small	City: Small	West	2014-2015 SY
Small	City: Midsize	West	2015-2016 SY
Small	City: Small	South	2021-2022 SY
Small	City: Mid-size	Midwest	2020-2021 SY
Small	City: Small	Midwest	2000-2001 SY
Small	Suburb: Large	Northeast	2020-2021 SY
Small	City: Small	Northeast	2018-2019 SY
Small	Suburb: Large	South	2019-2020 SY
Small	Suburb: Large	Midwest	2016-2017 SY
Small	Suburb: Large	Northeast	2019-2020 SY
Small	Suburb: Large	Midwest	2020-2021 SY

Appendix B

Sampling Methods Summary

Sampling Method	Technique	Number of Participants Located Using Each Method
Systematic	Email outreach to 213 EDs located across the 550 districts serving more than 15,000 students as of fall 2021	60
Convenience	Email outreach to 58 EDs located through a web search using the phrase “district equity director” or the phrase “district equity officer”	11
Snowball	Email outreach to other EDs recommended by an ED participating in the study	1

Appendix C

Interview 1 Protocol: Personal History, Role History, and Approach to District Equity Work

Tell me a bit about yourself and your journey to your district equity leadership role.

What is the history of the equity leadership role in your district? When and why was it established?

Diversity, equity, and inclusion can refer to many different things. What experiences, identities, and issues does your DEI work addresses most often?

> What role does race and issues of race play in your overall DEI work?

Some educators talk about "the work" and "doing the work" when it comes to racial equity. If you were going to tell someone one story about "the work" currently in your district that would illuminate what you do when it comes to racial equity, what would it be? Probe details.

Another idea that sometimes comes up with educational change and equity work is "building capacity." How, if at all, do you think about "building capacity" for racial equity? What does that mean to you and your work?

> What types of capacity? What types of capacity beyond individual equity literary or racial literacy? Probe school-level details.

Thinking across your district, what factors are most essential in moving racial equity work forward? I'd love to hear a story about what this looks like and sounds like.

Thinking broadly across your district, what factors make equity work challenging or most undermine racial equity work? I'd love to hear a story about what this looks like and sounds like.

How, if at all, has the ongoing pushback against "critical race theory" across the county played out in your district? What's a recent story about this pushback and its impacts?

What, if any, restrictions or censorship, have resulted from this pushback?

What other local contextual factors are most relevant to racial equity work in your district? What's a story that illustrates some of these factors?

This is my last question for today. Given your experiences in the role, what do you feel researchers should be asking and examining in order to better understand P12 equity leadership roles? Why?

Interview 2 Protocol: Role Configuration, Collaboration, and Impact

What has your work looked like since we connected last spring/last connected a couple of months back?

Who do you report to and how does this relationship impact your work? What's a story of a recent interaction or conversation with them?

How does your rank as an [RANK HERE] impact your ability to carry out your work, and what's an example of this impact? Ask for examples.

How does your role as a [RANK HERE] compare to other [RANK] level roles within the district? How is it similar and different from other director-level roles? Most similar other [RANK] level role?

IF OTHERS: Are there others on your team, and if so, what roles do they play in supporting district equity work?
IF NOT OTHERS: What would your ideal staff positions and responsibilities look like if you could create such a team? Probe details.

To what extent do you have knowledge and autonomy over a budget? How so?

How do you think about influence in your role? What forms of influence do you rely on most often to effect change? How so?

Which other district central office staff do you interact with most often and what are examples of some common interactions and collaborations? Why do you interact most with those people?

Reflecting on your role configuration and the role dynamics you've named, what are the pros and cons of the current configuration of your role as it relates to your ability to create DEI-related change?

What would success look like in your mind if you came into your district/schools one day and your work had been really successful, what would you see happening and what would you hear?

I can't thank you enough for sharing yourself, your time, and your work with me over these two interviews. I truly appreciate it. Are there any final thoughts or additions you would like to add before we wrap up?

Appendix D

Survey Protocol

Name and School District? (Only used for data analysis) [open-ended]

When did you begin in your current P-12 equity leadership role? [multiple choice]

What role did you hold most recently before your current equity leadership role? [multiple choice]

Which best describes the equity leader role in your district? [multiple choice]

How do you identify racially and/or ethnically? [open-ended]

What is your gender identity/expression? [open-ended]

Who do you report to within your district (i.e., position title)? [open-ended]

How many other staff, if any, directly support equity work in your district? [multiple choice]

Which best describes your equity leadership role within the district organizational structure? [multiple choice]

Is your role a cabinet-level role within your district? [binary yes/no]

What is the approximate budget for equity work in your district, including programmatic funds and salaries? [open-ended]

Is there anyone else in a similar K-12 district equity lead role you recommend I reach out to for this project? [open-ended]