

AGENDA

SC Education Oversight Full Committee Retreat
Beaufort Memorial Hospital Education Center
990 Ribaut Road, Beaufort, SC 29902, 4th Floor

Sunday, August 10, 2025

1:30 P.M.

- I. Welcome..... April Allen
- II. Opening RemarksDr. Frank Rodriguez
Superintendent, Beaufort County Schools
- III. Approval of Full Committee Minutes, June 9, 2025 April Allen
- IV. Presentations and Committee Discussion
 - State Superintendent of Education Update The Honorable Ellen Weaver
 - “Can Strategies in Corporate Culture Assist in School Improvement Efforts?”.....
Dr. Patrick Wright
Associate Dean for Corporate Relations, Department Chair
& Thomas C. Vandiver, Bicentennial Chair, Professor of Management,
Darla Moore School of Business
 - EOC Member Discussion Moderated by Sydney Locke & Patrick Wright

5 PM: Depart for *Check-in at Beaufort Sea Island Best Western Inn, 1015 Bay St., Beaufort, SC 29902*

6 PM: *Dinner to follow at the home of Rep. Shannon Erickson, 129 S. Hermitage Road, Beaufort SC 29902 (Carpooling is advised since parking is limited)*

Note: If a member of the public desires to attend the meeting, please contact the EOC Office at (803) 734-6148 or via email at ftennell@eoc.sc.gov by close of business on Friday, August 1, 2025. Because the event will be held at a facility with strict safety protocols, prior registration is required as well as proper identification upon entering the facility.

April Allen
CHAIR
Brian Newsome
VICE CHAIR
Tammy Achziger
Terry Alexander
Melanie Barton
Russell Baxley
Neal Collins
Bill Hager
Barbara B. Hairfield
Sidney Locke
Jeri McCumbee
Melissa Pender
Patty J. Tate
C. Ross Turner, III
Ellen Weaver

Dana Yow
EXECUTIVE DIRECTOR

SOUTH CAROLINA EDUCATION OVERSIGHT COMMITTEE
Full Committee Meeting
Minutes of the Meeting
June 9, 2025

Members Present (in-person or remote): April Allen, Melanie Barton, Representative Neal Collins, Dr. Bob Couch, Representative Bill Hager, Barbara Hairfield, Sidney Locke, Melissa Pender, Dr. Patty Tate, Senator Ross Turner

Special Guests: Heather Bolinger, Tracey Davenport, Dr. Abbey Duggins, Dr. Matthew Madison

EOC Staff Present: Tenell Felder, Gabrielle Fulton, Hope Johnson-Jones, Dr. Rainey Knight, Dr. Matthew Lavery, Dr. Jenny May, Dana Yow

EOC member Barbara Hairfield opened the meeting and asked for a motion to approve minutes from the April 14, 2025 full committee meeting. After a motion was given by Senator Ross Turner, the meeting minutes were approved. Hairfield then asked EOC Executive Director Dana Yow to read the Academic Standards and Assessments (ASA) subcommittee report from the May 19, 2025 meeting as the first action item.

Yow informed the committee that the ASA subcommittee took action to approve the South Carolina Tiered Credential System for use in the upcoming school year and for its integration into the accountability system.

Yow then presented to the full committee an overview of the Tiered Credential System. She informed them the subcommittee received reports on the proposed system and were able to ask questions about the system to Southern Regional Education Board (SREB) staff as well as to the State Department of Education. Yow informed the committee that the current system was an equal weight credential system, and that districts and schools would be able to transition into the new tiered system during the 2025-26 school year, with full implementation not taking place until the 2027-28 school year. She also emphasized the importance of making sure that credentials provided credential currency – real employment values that align with labor market demands and workforce priorities.

Next, Yow reviewed the tier descriptors and how credentials would be organized under the new system. Calling committee members' attention to their meeting packet, Yow stated that credentials highlighted with red were "low use" credentials meaning that they had been used by students less than 50 times in the last five years. She also noted that there were approximately 512 credentials on the list.

Students who entered high school prior to the 2024-25 school year will meet their career ready status under the current system. Tenth graders for the 2025-26 school year will be the first class under the new system for their high school career.

In contrast with the equal weight system where only one credential is required, students will have to earn at least three points under the new system in one of the following three combinations:

- One Tier 3 credential aligned with their career cluster.
- A combination of one Tier 2 and one Tier 1 credential within the same career pathway.
- A Universal Credential (e.g., OSHA 10) paired with a Tier 2 or higher credential within the student's career cluster.

Yow also clarified that for a student to receive their career ready designation, the credentials must align with the student's designated program of study and career cluster.

For the final approval process, Yow explained that all tier placements and TAC recommendations will have to be finalized by Oct. 1. The ASA subcommittee will then review and vote on the list in November and will send the list to the full EOC for approval during the December meeting.

At the conclusion of the presentation, ASA subcommittee chair Dr. Tate informed the committee that the ASA subcommittee unanimously approved the tiered credential system. Questions were then accepted.

Melanie Barton asked for clarification on who would be making the submissions on Oct 1. Yow replied that it was an evolving process that would have to come before the S.C. Department of Education. She stated that the department had created a form that districts could use to submit recommendations and that the window for accepting those would close on Oct. 1.

Barton then asked if Yow could verify that the system was being implemented so that South Carolina public school students would leave high school with employable credentials for high quality jobs with future career options. Yow confirmed that this was the reasoning behind the new system being implemented

Next, Dr. Couch asked for clarification of how many certifications students would need to get to be considered career ready.

Yow clarified that one certification would fulfill the requirement with the following conditions: it must be a Tier 3 certification, the student must have a combination of a Tier one and Tier two

certification, and the student must have completed their career pathway in addition to the first two conditions.

Barton then asked how the Tier designations were determined.

Yow clarified that the EOC along with the SREB and SC Department of Education looked at business and industry requirements internally along with convening with individual TACs.

Following this there were no further questions. Hairfield asked all in favor of approving the tiered credential system to vote for such. The tiered credential system was passed unanimously.

Dr. Tate then informed the committee that the ASA subcommittee received an evaluation of the Biology I End of Course exam with K-12 Assessment Solutions at the University of Georgia. This evaluation was carried out pursuant to section 59-18-320 of the South Carolina Code of Laws for the EOC to review the state assessment program and course assessments for alignment with state stands, level of difficulty and validity. Due to questions that emerged during the presentation at May's ASA subcommittee meeting – no action was taken.

EOC Deputy Director Dr. Matthew Lavery then provided an overview of the assessment noting that a similar review of ELA, English 2 and two other science tests would also be reviewed once those scores were collected. He then turned the presentation over to K-12 Assessment Solutions Co-Director Heather Bolinger to present the evaluation of the biology exam. Bolinger stated that the review included a blueprint analysis, content alignment, a depth of knowledge review, a psychometric evaluation, and the performance classification analysis.

In terms of the test blueprint, Bolinger reported that the EOCEP Biology 1 test blueprint reflected a subset of 2021 SC standards with generally balanced coverage, but that the terminology and categorization differ slightly between the blueprint and the curriculum. It was suggested that this could be refined for clarity. Recommendations also included adding standards to further improve balance across reporting categories and to increase DOK Level 3 items to improve assessment of higher order skills. It was also recommended to revise flagged items in the item validity and alignment review.

Next, Department of Educational Psychology assistant professor Dr. Matthew Madison was introduced to discuss Psychometric Quality and Fairness. He reported that the analyses indicated high quality items and appropriate difficulty, strong reliability and that item comparisons showed negligible bias. They recommended continuing monitoring fairness, considering more flexible IRT models and considering CFA for internal structure validation.

Next, Dr. Madison discussed their review of the Performance Level Classification. Recommendations for this included to add items near cut scores and to explore classification-supportive models.

Following this, questions were accepted.

Barton asked if the Biology I exam was only taken on a computer.

Dr. Lavery confirmed that the exam was primarily and almost exclusively computer based as 99% of students took the exam on a computer while a small population of students could take the test on paper as an accommodation.

As a follow up, Barton then asked how many items on the test were technology enhanced to allow them to analyze data.

Bolinger replied that of the 60 items on the test, 13 were technology enhanced items. Of these 13 items, 3 were field test items and the other 10 were operational items.

Following this presentation, Yow informed the committee that Deputy Superintendent and Chief Academic Officer Dr. Abbey Duggins would respond to the SCDE Biology I evaluation on behalf of the department.

Barton then asked Dr. Lavery to confirm that the test they were looking at was valid and reliable without bias. She expressed that her concern was that the test that was administered this year would be used for accountability before the EOC approved it. She stated the EOC needs to get the process better aligned because it would make a difference to educators – noting it was fortunate the test was found to be reliable since it has to be administered before approval.

Dr. Ferguson replied that he had spoken with EOC Executive Director Dana Yow about the matter – saying the timing of approval for the test could not be helped because it interfered with school report cards.

Yow stated that in a conversation with the University of Georgia, it was determined once science results were received from the department there could be a quick turnaround of one to two weeks. Yow also acknowledged that it was a process.

Barton agreed and responded that two field tests were used previously. She also mentioned that math testing had a high likelihood of possibly requiring changes and urged the committee to keep that in mind. She asked the committee to consider working closer with the Department of Education to resolve the matter as she believed it would benefit educators.

Hairfield stated that the ASA subcommittee had many questions about the Biology I end of course exam because of confusion around the test's blueprint.

Yow then reminded committee members that the present discussion was about approving UGA's evaluation, not the test itself.

Dr. Duggins was then called to provide the SCDE's response to the Biology I exam acknowledging that there was some confusion at the ASA subcommittee meeting that she hoped to provide clarity on. She stated that the SCDE agreed with the report's clarification. She then addressed that a double alignment of items presented by Bollinger led to an accounting error with the SCDE's assessment contractor. Therefore, the biology form 420 D used in the review was constructed based on a correct alignment. She stated that this was a point of clarification that should have been made when the subcommittee met in May.

Duggins then stated that there were two other items in question. For the first, she stated that the office of assessment and standards was in agreement with the testing contractor about having a two-dimensional alignment and aligning with performance expectations. Dr. Duggins clarified that the Office of Assessment and Standards at the State Department of Education agreed the form is valid for all intended uses and apologized for the confusion in the subcommittee meeting. Dr. Duggins then stated that the department was working internally to strengthen their processes to ensure communication both internally and with the testing contractor would be more seamless.

Hairfield thanked Dr. Duggins for her response then asked if the alignment she mentioned addressed the blueprint to which she replied that it did.

As there were no additional questions, a vote was taken to approve the University of Georgia's report. The motion carried.

Next, Dr. Tate informed the committee that the ASA subcommittee also received the 2025 report on the Educational Performance of Military Connected Children from Dana Yow. She stated the report is a requirement of Act 289- the Military Family Quality of Life and Advancement Act. Part five of the act requires the EOC develop a report on the educational performance of military connected children. The report recommended South Carolina school districts should require the collection of military-connected data during school enrollment procedures, and that the data should be populated into the student information system. Dr. Tate also mentioned that the EOC should partner with the South Carolina Department of Veteran Affairs to include a data visualization dashboard on military connected students.

Following this update, Hairfield called forward EOC Director of Qualitative Research & Stakeholder Engagement Dr. Jenny May to discuss the EOC's report on the Educational Credit for Exceptional Needs Children program.

Dr. May stated that the ECENC program is not funded through taxes but through donations and also clarified that the EOC's role is to approve schools for the program. In general, the Lowcountry region has the most schools approved for the program at 39 schools. Dr. May also pointed out that the average amount per student to participate in the program has increased over the past two school years. Another notable trend is that the percentage of ECENC funded students in each grade also increased from the 2022-23 to 2023-24 school year.

The following recommendations were presented in the report:

- To offer summative assessments to ECENC students who attend public schools. This would provide qualitative data to help determine the effectiveness of the ECENC program for students.
- To reconvene the Advisory Committee for the purposes of confirming processes for communication and collaboration on ECENC work and to advise EOC staff on a process to consider school approval when there is a special circumstance or a discrepancy about services offered.
- To consider communication about the ECENC Program and other scholarship programs offered by the state.

At the conclusion of the presentation, questions were accepted.

Barton suggested that the committee consider looking at school level data for assessments, rather than just grade level data, to help measure the program's success.

Melissa Pender then asked Dr. May to confirm if students needed to be tested in public schools. Dr. May clarified that students could be presented with the option to be tested in a way that is compliant with assessment rules. Yow also clarified that it had to do with test security, which was currently not allowable.

Following this, Hairfield asked if there were any additional questions for Dr. May. Seeing none, a motion was presented to approve the ECENC report. The report approval passed.

Hairfield then commented that there were two clarifications that the committee had for Dr. Duggins. The first clarification was asking if the committee had one month to hear from the

department on how the concerns on the Biology I end of course exam would be addressed. Dr. Ferguson responded that he believed the department would have to respond in writing 30 days once the motion was approved. Hairfield then asked if the committee could get a date on when science tests for 4th and 6th grades would be ready to go to UGA for their assessment.

Dr. Duggins replied that the superintendent had a meeting for June 17th and that to her understanding, the scores would be ready then. Dr. Ferguson commented that he believed the scores would be provided later in July as the scores would need to be processed through DRC.

Yow also stated that the EOC would have a meeting with the department to help mitigate issues.

Pender asked for a clarification if the 4th and 6th grade scores would count towards accountability to which Dr. Ferguson replied that they were currently in the accountability manual to count for the current school year. Pender then asked what would happen if UGA came back and reported that the test was not valid. Dr. Ferguson replied that he did not expect that the assessment would not be unreliable.

Melanie Barton then asked if the UGA assessments were used to get the US Department of Education to approve the test. Dr. Ferguson responded he would have to get back to her with that answer.

Following this, Dr. Bob Couch was asked to update the committee on the EIA Budget. Dr. Couch informed the committee that a majority of the committee's recommendations passed, then called on Yow to provide the detailed review. Yow then provided an overview of the EOC's recommendations noting the recommendations that passed and those that did not. She noted the EOC's recommendation to decrease by \$1.4 million the South Carolina State University Bridge Program and reallocating those funds to Call Me Mister was passed. In addition, the committee's recommendation to allocate \$6 million to the Dolly Parton Imagination Library was accepted. She then reviewed the proviso recommendations, noting that all provisos passed with exception of the proviso to reinstate social studies testing.

Following this, Yow provided an update in the 2025 Retreat for August 10-11th asking members to confirm their attendance.

Yow then recognized Dr. Ferguson's new position acceptance as the superintendent of Darlington School District. She expressed gratitude to Dr. Ferguson's service to South Carolina's education system. She also recognized Dr. Couch who served on the EOC since January 2015. Yow thanked Dr. Couch for his ten years of service to the committee.

After thanking the committee for the recognition. Dr. Couch provided a report to the committee on the nomination committee to nominate April Allen and Dr. Newsome to serve as Chair and Vice Chair of the committee.

After the motion carried, the meeting was adjourned.

AGENDA

SC Education Oversight Full Committee Retreat Beaufort Memorial Hospital Education Center 990 Ribaut Road, Beaufort, SC 29902, 4th Floor

Monday, August 11, 2025
8:30 A.M.

Presentations and Panel Discussion

- I. Presentation/Tour of Simulation Labs Russell Baxley,
CEO, Beaufort Memorial Hospital
& Joy Solomon, Education Director,
Beaufort Memorial Hospital/
Director, People Achieving Their Highest (PATH) Program

- II. Beating The Odds Investigative Study (BTOIS) Report.....Dr. Jenny May

Panel of BTOIS Principals..... Moderated by Dr. Salandra Bowman,
Chief Learning Officer, SCETV

Panelists of Principals

Brian Perrin, Merrywood Elementary
Kelli Overcash, Kershaw Elementary
Monique Smalls, Former Kelly Edwards Elementary
Jeremy Sauceman, Honea Path Elementary
Dollie Morrell, Latta Elementary

III. EOC Staff Updates

Be Present SC Campaign..... Tenell Felder

Launch Years / Partnership with Univ. of SCDana Yow

IV. EOC Chair Update April Allen

Lunch will follow at 1 PM. Box lunches will be provided by Beaufort Memorial Hospital

April Allen
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EXECUTIVE DIRECTOR



**SC EDUCATION
OVERSIGHT COMMITTEE**

Reporting facts. Measuring change. Promoting progress.

Beating the Odds Investigative Study

Report I

How Do SC Public Schools with High Rates of Poverty and Other Risk Factors Support High Academic Achievement for Their Students?

Jenny May, PhD

**Amina Asghar; Riley Dixon; Tenell Felder; Gabrielle Fulton;
Matthew Lavery, PhD; Rainey Knight, PhD; and Dana Yow***

**Listed alphabetically as they contributed to the research.*

Introduction & Background

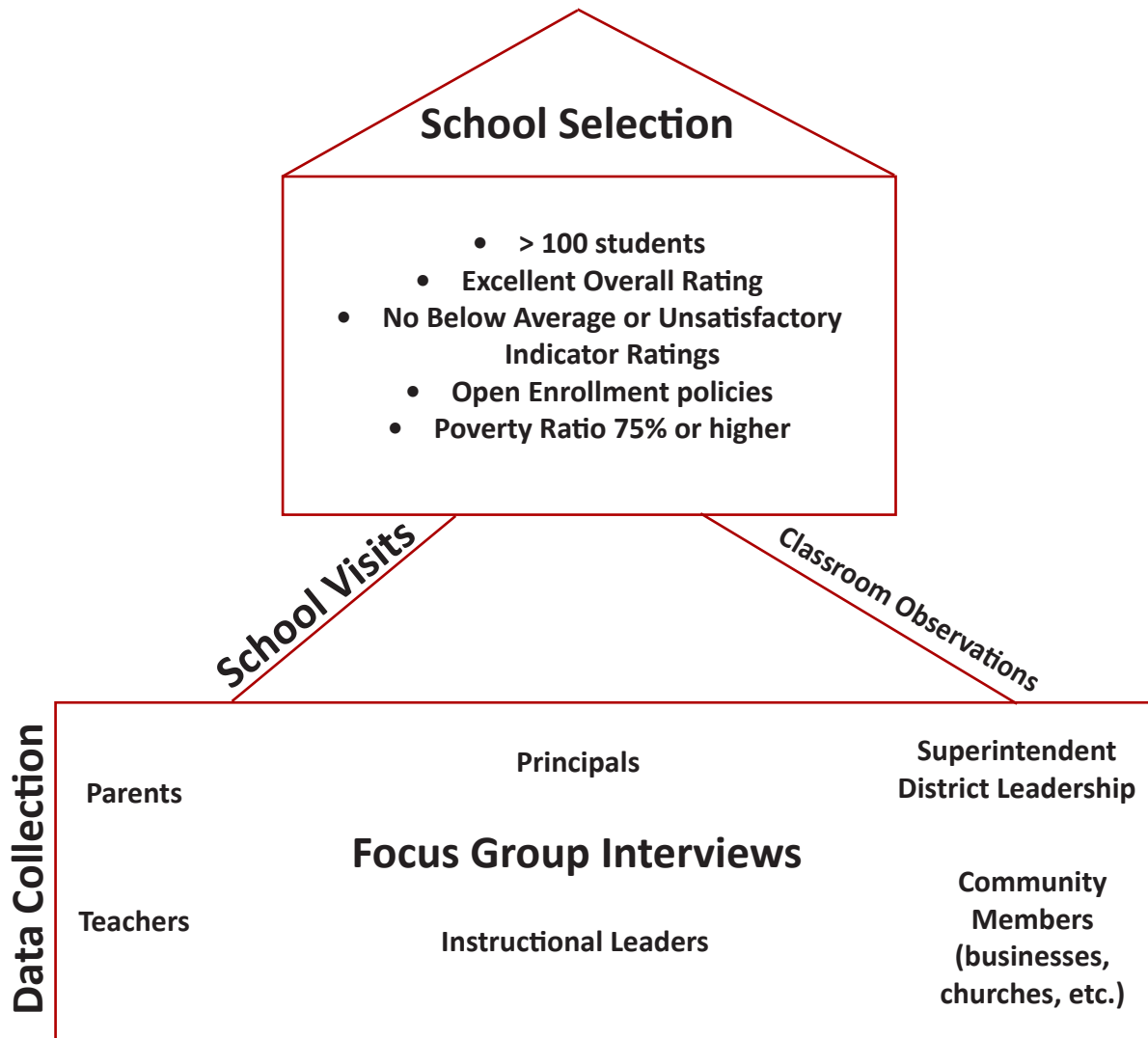
Pursuant to state law, the Education Oversight Committee (EOC) has an obligation to the citizens of South Carolina to gather, analyze and report on data from a variety of sources to communicate school performance to the public. The goal of this research is to support continuous quality improvement in the public school system. A great deal of data visualization is related to accountability including academic achievement, post-secondary or preschool education and school climate. In studying these measures, EOC members and staff found that the data in South Carolina aligned with research conducted on a national scale finding that poverty covaries with a great deal of outcomes related to lower academic achievement than counterparts not experiencing poverty. One EOC member asked, “Where is it going well for students in poverty?” and the Beating the Odds Investigative Study (BTOIS) was born.

Poverty is widely recognized as a contributing factor to low academic achievement. Children from poverty often score lower on standardized tests compared to counterparts who are not in poverty, and Reardon found this achievement gap has grown by at least 30% since the 1970s (Reardon, 2011). Families in poverty are more likely to lack access to books, internet, and other activities that support high achievement such as tutoring and in 1995, Hart and Risley famously found that children in poverty hear 30 million fewer words before they are four years old, than children not in poverty. This “word gap” contributes to deficits in early literacy skills for students in poverty. Poverty is also linked to delays in language, attention, and executive function (Duncan, 2007). Chronic or toxic stress that accompanies food or housing instability disrupts working memory, which is imperative for learning and can impact academic achievement (Evans & Schamberg, 2009). The National Center for Children in Poverty reports that children in poverty are more likely to be transient or truant, yet attendance is a mitigator of the impact of poverty on academic achievement (Chang & Romero, 2008). Additionally, students in poverty often attend schools with fewer resources and teachers may unintentionally or subconsciously have lower expectations for students from disadvantaged backgrounds (Duncan & Murnane, 2011). These multifaceted challenges are being overcome in some schools in South Carolina, and this study seeks to learn how.

There were 161 Elementary schools that received an Overall Rating of Excellent on the 2023 School Report Cards, the most recent data source when this investigation was being launched. The median poverty rate for these schools was 53.8% pupils in poverty. However, the median is potentially misleading since schools can vary greatly in the number of students enrolled. Calculating poverty rates at the elementary schools weighted by student enrollment suggests that only 47.2% of students statewide who attended an elementary school with an Excellent Overall Rating were identified as pupils in poverty. During the same School Report Card year, there were 105 Elementary schools that received a Below Average or Unsatisfactory Overall Rating on the 2023 School Report Cards. The median poverty rate for these schools was 84.5% pupils in poverty. Calculating poverty rates weighted by student enrollment indicates that 80.3% of students statewide who attended an elementary school with a Below Average or Unsatisfactory rating are identified as pupils in poverty. Schools with high levels of poverty were not all destined to receive the lowest Overall Ratings; some schools serving similar students do achieve excellent student outcomes. In this study high poverty schools who earn an Excellent Overall Rating are said to be “Beating the Odds”.

Several questions drove data collection for the Beating the Odds Investigative Study (BTOIS):

1. Of the schools in South Carolina serving high populations of students in poverty, which covaries with low student achievement, what schools are beating the odds?
2. What is happening in these schools to achieve academic outcomes different from other high poverty schools?
3. Are there patterns across schools beating the odds? If so, what are they?
4. Can these practices be scaled up so that all children in poverty who attend SC public schools become high academic achievers?



To answer these questions, criteria were established to describe what it means to beat the odds, and how to identify schools to study. Because student development would account for differences in successful strategies for elementary, middle and high school students, schools in each of these grade bands were considered separately and elementary schools were studied first. This report describes the investigation of elementary schools. Middle and high schools will be studied in the future using similar methodology.

Schools that met criteria for inclusion in the study were identified using quantitative metrics related to accountability and ratings on [SC School Report Cards](#). To complete the study in the time allotted, EOC staff determined that between six and eight elementary schools could be studied in one year of the study. To be eligible as a partner school several conditions must be met:

- ✓ School enrollment must be greater than 100 students.
- ✓ Schools must have an “Excellent” overall rating with no “Below Average or “Unsatisfactory” indicator ratings on the SC School Report Card.
- ✓ Schools must have a poverty ratio greater than or equal to 75%, the same level of poverty necessary to qualify for federal Title I funding.
- ✓ Schools must have open enrollment policies; schools of choice may be considered as long as transportation is provided, and enrollment is not contingent upon academic achievement or the evaluation of an application or audition.

Schools that met these four criteria were identified and then groups of approximately six schools were grouped together to find a cohort of partner schools that were most representative of the state considering geography, size, and other characteristics. Once a cohort of schools was identified, district and building leadership were invited to participate in the study as a partner school, which did require additional time and effort on behalf of the school community for researchers to collect data. Materials to explain the study to stakeholders and recruit partner schools are available in Appendix A. Without the participation of BTOIS partner schools, this study could not be completed and substantially less would be known about how to improve academic achievement in high poverty schools in South Carolina. The EOC and staff thank and commend BTOIS partner schools for their commitment to students in their school, but also to the field of education in general.

Schools that agreed to participate scheduled a day for EOC staff to come tour the school, observe classrooms, and complete four focus group interviews with specific stakeholders: teachers, parents, community members, and instructional leaders. The principal and District Superintendent were also interviewed, occasionally in a focus group with other stakeholders, or individually. Questions used to guide these conversational interviews are found in Appendix B. Interviews were recorded and notes were taken for later analysis during interviews, tours, and observations. For each focus group interview, two research staff met with between 6 and 10 stakeholders to collect data. Not all researchers were able to participate in each interview and visit each school, so staff worked together to analyze data.

Data was analyzed to develop a theory about how high poverty elementary schools foster high student achievement. This systematic methodology is known as grounded theory research and is well suited to allow researchers to explore complex phenomena in the social sciences. It relies on a consistent comparative analysis of data across settings and situations with a focus on actions and interactions. This methodology provides insights grounded in the experiences of participants and utilizes four methodological steps:

1. Data collection from in-depth interviews and observations
2. Open coding to analyze the data across broad themes
3. Axial coding to refine the broad themes and identify relationships between these themes and how they interact
4. Selective coding to integrate themes and relationships across themes into a working theory

EOC staff completed open and axial coding together as a group, and then the working theory was approved by all researchers to ensure all salient features were captured in the theory. After a working theory was developed, this methodology was repeated with the second cohort of elementary schools meeting the same qualifying criteria. The purpose of repeating these research steps for a second year is to confirm that the themes and theory that were developed in Year 1 of the study hold true.

How were the Schools Identified?

Exploratory Phase, Year 1:

From all schools with 75% or more pupils in poverty, those that had Overall Ratings of Excellent with all indicators rated Average, Good, or Excellent were identified. From this group of schools, selection criteria were confirmed, and 15 schools were identified as potential partners. The cohort of seven schools most representative of the state of South Carolina as a whole included: [The Cleveland Academy of Leadership](#) in Spartanburg District 7; [Kelly Edwards Elementary School](#) in Barnwell Country School District; [Latta Elementary School](#) in Dillon School District 3; [Matthews Elementary School](#) and [Merrywood Elementary School](#) in Greenwood 50; [Monaview Elementary School](#) in Greenville School District; and [Waterloo Elementary School](#) in Laurens County School District 55. The decision was made to study two eligible schools in Greenwood 50 school district to determine if there were features specific to the context of the school district and community that would benefit other students by scaling up across the state.



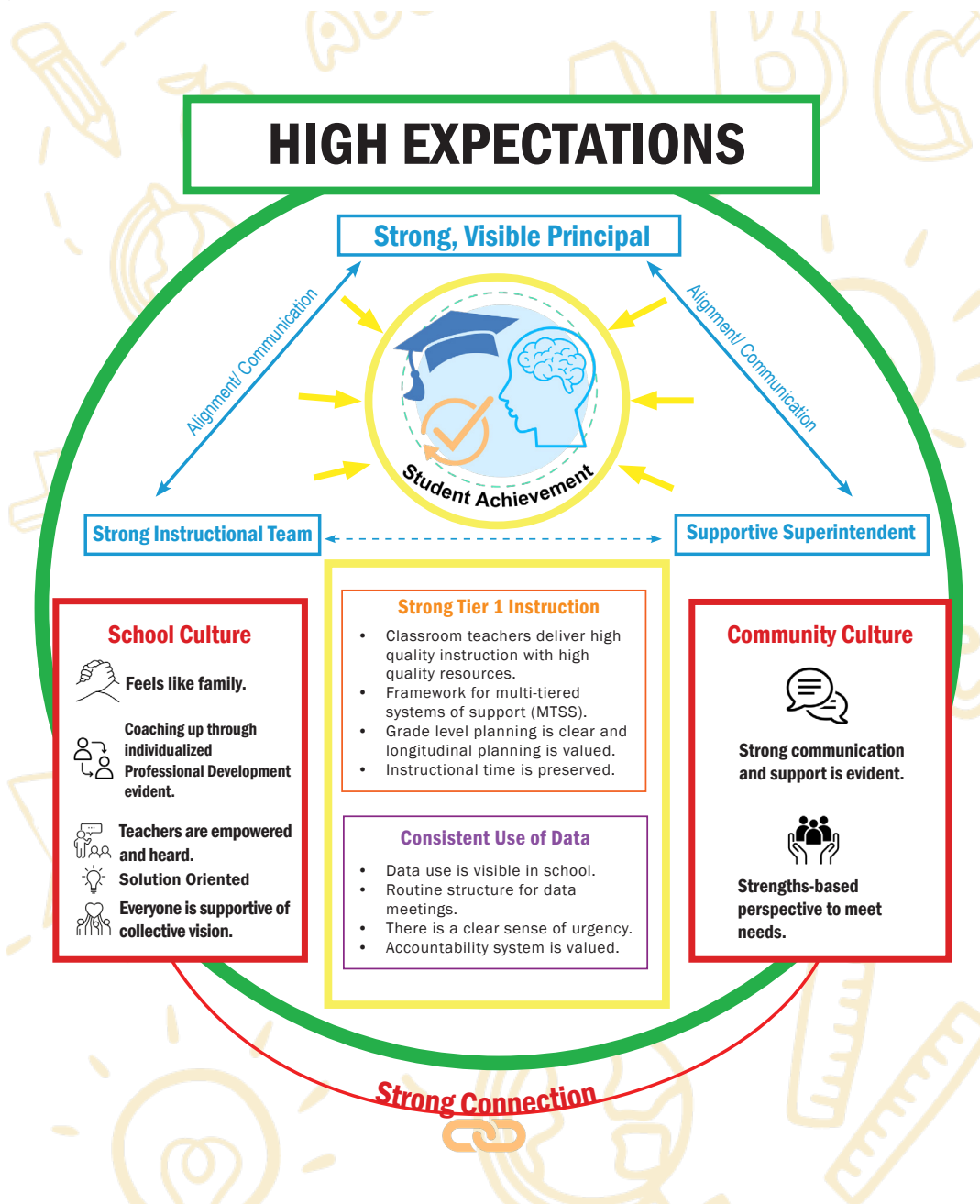
Confirmation Phase, Year 2:

During the second year of the study, 10 schools met the criteria for partnership in the study according to the four criteria described earlier. Schools studied in Year 1 were not selected for observation for the Year 2 confirmation phase. It is expected to see the same strategies in schools across two consecutive years; since researchers were seeking salient actions across schools, a unique cohort was developed. From the list of 10 eligible schools, five were selected and agreed to participate as partner schools. The cohort of five schools most representative of the state of South Carolina as a whole for year 2 of the study included: [Flat Rock Elementary School](#) in Anderson School District 3; [Honea Path Elementary School](#) in Anderson School District 2; [Hopkins Elementary School](#) in Richland School District 1; [Kershaw Elementary School](#) in Lancaster County School District; and [West Pelzer Elementary School](#) in Anderson School District 1.

Findings

Data collected during interviews and school visits was analyzed by the research team of EOC staff and a theoretical framework was developed of the most salient features of schools in South Carolina that Beat the Odds. The framework was confirmed and refined during year 2 data collection and analysis. Figure 1 illustrates the framework.

Figure 1: Beating the Odds Theoretical Framework



Strong Leadership

A strong leadership team was observed in each of the BTOIS partner schools comprised of a principal, instructional leadership and a supportive superintendent. The principal and his/her leadership were central to the success of the school and as a result the superintendent was able to provide support as needed, empowering the principal to meet high expectations for academic achievement without excuse. All superintendents but one met with the research team and were knowledgeable about school events and programs. The presence and awareness of the superintendent allowed for principals to feel accountable to an individual and the broader community while also being supported in their own leadership.

Strong, Visible Principal

The principal in each BTOIS partner school was visible and accessible in the school and the community. Each principal was approachable and built relationships within the culture of the school and community to support teachers and caregivers in focusing on student achievement. All principals used data to inform decisions and hold her/himself accountable as well as the teachers, yet this was not done in a punitive sense, but rather to foster high expectations, and monitor growth/effectiveness of programming and interventions. The team of educators was coached to meet the expectations of the principal and school culture that was developing, but staffing changes were made as seen necessary by the principal. The principals were all steadfast in their goal for high achievement and excuses were not tolerated; rather they were reframed as a need or a problem to solve — then different strategies were deployed to meet goals around student achievement.

“We want to ignite development leaders! The motto for me is to lean heavily on certain leadership to ensure that everyone knows that we are in this together... in roles that are outside of our job description. And that's what we try to instill in everyone else (at the school). This has to be done for kids. That's our number one goal.”

- A BTOIS partner school principal.

Instructional Leadership Team

The instructional leadership team included reading and literacy coaches, assistant principals, behavior consultants, social workers and counselors who the principal would meet with regularly and work with closely with the goal of improving student achievement. Instructional coaches in each of the BTOIS schools were valued and respected and seen as a resource to solve problems that impact the classroom and support teachers. There was a high level of trust between the instructional leadership teams and the teachers who felt comfortable reaching out with questions. Instructional leadership teams developed several supports for teachers including data binders, model lesson and intervention plans, district pacing guides aligned to SC standards, in-class coaching models, and professional learning communities.

Instructional coaches shared the same vision and perpetuated the school culture that was being established by the principal, while working in partnership with the teachers in the building. A strong chain of communication existed between the instructional leadership team and teachers, principals and the district office allowing for efficient decision-making at the building level. Instructional leaders were expected to hold teachers accountable and support strong tier 1 teaching, while building trust and collaboration between teachers in the building. For this reason, the instructional team was described as trusted, warm, and approachable with an important, yet secondary goal of keeping teacher morale high within a culture of high expectations.

“We have collegial conversations around what's working well in my room (we might say) ‘well, this didn't work—why? How can I fix that?’ and that's your support. That's also your appreciation and then holding them accountable. This administration has designed something called induction rounds. We adopted that from the medical field and the three of us along with three coaches get together and create a schedule to go in one teacher's class. So all six of us are in the room watching that teacher teach, and... we have a goal of what we're actually looking for (the teacher knows), and we come out of that classroom and have a discussion about what we saw. Then we provide feedback to the teacher, based on the goal we set together, and this is also connected to what they learned in the PLC (Professional Learning Community). They don't mind all six of us coming in—everyone knows it's going to happen and it's just part of teaching here, we're all lifelong learners.” - Assistant Principal at BTOIS partner school.

"A few months in (to my first year of teaching), I realized my classroom management was a problem---I struggled in that area, so I went to my principal. Instructional coaches came in and supported me and then I was able to go to a training. There was a sub for my class, I learned a great deal then ultimately, I became a trainer in the classroom management strategies! This was a great support for me to have in the school and ultimately outside of the school, and now I can be a support for other teachers here too!"

- Teacher at a BTOIS partner school

Superintendent

Superintendents of BTOIS schools were supportive of the efforts and vision of the principals, yet balanced being aware and supportive of the good work the schools were engaged in with "staying out of the way." In many cases, the superintendent visited the schools and held monthly meetings with principals after monthly board meetings. Building leadership reported that data celebration tours by the superintendent, school board or cabinet would occur. Despite having full calendars and obligations across the district, ten of the eleven superintendents met with researchers and when one superintendent could not attend, several deputy superintendents participated instead. One superintendent came to meet with staff during the busy budget meeting season to "come support the good work being done here." Like principals the superintendents are present, aware of the events and programs happening at schools and in many cases, the approachable characteristics of the superintendent provided a leadership model for principals.

"He became superintendent and is really immersed deeply in every facet of operations. And what that allowed him to do was increase the profile of the district, but also be in the know as things were happening in the community to properly advocate (for what is needed). And so, following that model, I did the same thing."

"(Principals have) heard me say this tons of times, and I've even said it in principal meeting. What I tell my district office is that when you pull up to a school, that school better be cheering, because you're either bringing encouragement or you're bringing resources or you're bringing help. That's the reason we exist, is to support those schools, which in some districts, that is not the case, but that is really important to us."

- Superintendent at a BTOIS partner school.

High Expectations

A culture of high expectations saturated BTOIS partner schools and joyfully influenced the community culture. In BTOIS partner schools, high expectations were maintained by the superintendent, principals, teachers, support staff, community members and students themselves through honest and respectful communication. These high expectations had high support to meet them, which allowed for collaborative problem solving across stakeholders which was seen largely as an asset of the school and community. A resounding belief that "all students can achieve" regardless of their circumstances was fostered and excusing poor academic performance because of poverty or other risk factors was coined "toxic empathy" in one district. In each BTOIS school, there was evidence of an overwhelming belief that students can meet not only high academic expectations, but high behavior and character expectations too. This resulted in a culture of shared excellence, resilience in meeting a variety of challenges, and pride. As challenges arose, there was a tangible solution orientation and adults acted swiftly to remove inhibitors to learning or teach students to achieve despite limiting factors. There was no problem, quality, or characteristic that could limit achievement in the BTOIS partner schools, and appropriate action to solve problems with a shared sense of urgency created an environment where all students could learn.

"I think you've got to not be afraid to set high goals for yourself, and you got to be comfortable with that, even though that's not comfortable, because no one, no one wants to not meet their goal. But if you don't set high goals and hold yourself accountable and take ownership of the student learning, it will never be what you want it to be." - Principal at a BTOIS partner school.

“We’re very honest with our students, because many of them have to be very grown up for a number of reasons outside of this building, so we are very real with them and many of them will hear every year they are here ‘We don’t care where you started, it doesn’t matter what your house looks like or your clothes—what we care about is where you finish.’ And poverty is not an excuse—it is not an excuse for anyone in this building, and even very young children—they understand.” - Principal at a BTOIS partner school.

In BTOIS partner schools, students were on-task in classrooms and challenging themselves and each other to achieve. Adults in the school were engaged in teaching yet were also modeling and guiding the students to take ownership of their learning and achievement by encouraging them to set their own goals. While students were practicing skills with partners or engaged in individual or student led small group work, teachers were visible and able to facilitate learning which allowed for limited interruptions, short transition times and little wasted time in the classroom. To maximize learning time, some principals described scheduling additional intervention time during breakfast and before the traditional instructional day begins. While the traditional school day starts at 7:45, students may come in the building and teachers who volunteer for “early duty” are present and available at 7:15 to conduct a read aloud before the instructional day technically begins. There is no shortage of volunteers, and students get breakfast while discussing literature, reading strategies and listening to a read aloud in banded grade levels. This example illustrates the teachers’ and students’ commitment to excellence and each other.

“We set an expectation---the whole school participates! One of our custodians came to me and asked ‘what can I do in the morning?’ and I said ‘you can read!’ so he reads to first and second grade students. But everyone wants to participate, so I told him if she (the teacher) is reading then you’re crowd control. So when I tell you we have buy-in from everybody... Our expectation is “above and beyond” for the staff and for the kids.” - Principal at BTOIS school.

Similarly interventions are offered during afterschool time for students as well to increase instructional minutes without removing children from Tier 1 instruction.

Examples of high expectations and a solution orientation changing the academic trajectory for students include a principal electing to participate in a program through one of the Centers of Excellence in South Carolina when attendance was a noted problem in the school. As a result of participating in this program, the principal collected data, analyzed drivers and reduced absenteeism, which is a known contributor to low achievement. Another principal described transiency as a problem in the school community. Upon learning that some families were living in a motel, the principal worked with community partners to create financial stability and empower these families. Ultimately consistency in educational placement and interventions for students was provided by addressing the problem of insecure housing.

“We partnered with them (community partners) to build three houses for families. So these families had to go through a whole mentoring program with families from First Presbyterian Church. They also had to go through counseling support, mental health and physical health support and become an active volunteer here at the school and community. They had to complete 70 hours of financial literacy for a grade. And once they did that, they received the keys to their homes at costs as a percentage... And so each of those families turned the key to their own home with equity. And so I think that’s probably the thing I’m most proud of just positioning those single-mother families in need homes of their own with equity... We did that. Because quite honestly transiency is like I used to say it’s like solving world hunger---but I think we can solve world hunger, so maybe that’s not the right analogy... But I saw it as an opportunity to anchor families. So there’s no better way to anchor folks than to provide constant shelter--them owning their own homes.”

- Principal BTOIS partner school.



Effective Teachers/Strong Tier 1 Instruction:

Effective teaching practice and strong tier 1 instruction are very closely linked to high expectations, which is illustrated by the efficiency of the schedule to make the best use of time, coaching and curricular decisions. Alignment between instructional coaches, strong principals, and supportive superintendents of the leadership teams is a necessary component of strong tier 1 instruction.

“Well, our vision here is in guiding and developing leaders, and so the frequent perspective (is that) we are looking to provide students with the best read aloud, the best activities that go with math instruction, so that we can ignite their mind in the right way so that they can meet and exceed expectations. That’s the overall vision and in the process of that there’s all those leadership skills so that they can lead their own learning.” - Principal at a BTOIS partner school.

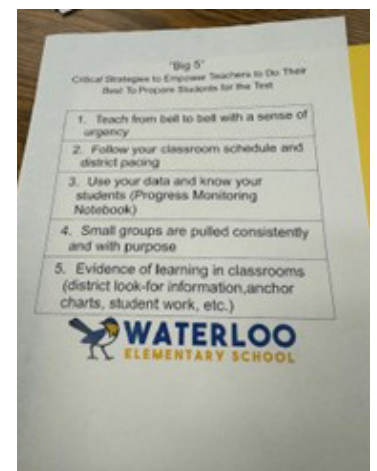
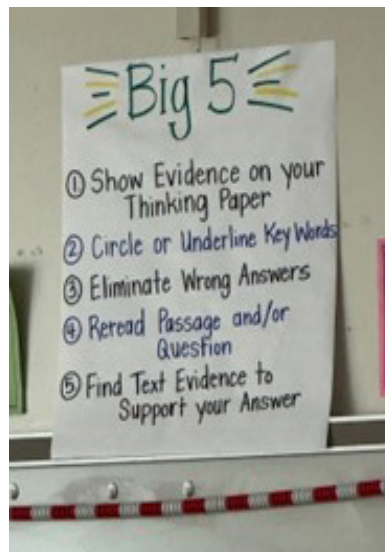
Establishing and maintaining effective teaching practice requires candor and respect when communicating across all stakeholders in the school so that trust and collegial relationships remain even when improvement must be made so school staff can do so together. Examples of this could be seen in each of the BTOIS partner schools, perhaps most notably as staff left a school after BTOIS data collection and passed a principal and teacher debriefing informally and the principal was heard saying “I’d encourage you not to do that anymore in your classroom because...”. This was an authentic moment that demonstrated the respect and honesty in which actionable information is conveyed to team members as part of continuous improvement and commitment to excellence. Another principal described being friends for years with some teachers in the building, and could not allow friendship to obscure professional feedback and leadership saying, “outside we are friends, in here, we have a job to do.”

Classroom teachers are empowered to deliver high quality instruction with high quality resources, and design effective interventions to implement a robust Multitiered System of Supports (MTSS). An effective framework for MTSS was observed in both exploratory year 1 and confirmatory year 2 visits, however, there are scheduling differences to best meet student and teachers needs across these cohorts developed by the principal and instructional leadership team.

“We have an MTSS team that wraps around to attack that entire child just so the teachers can focus on teaching. So we meet weekly, myself the behavior coach, the social worker, parent involvement facilitator. When a referral comes and a kid gets a referral, that family gets a call from all of us. And we try to address (and work) through the problem. So for me... I try to take all the extra stuff off the teachers’ plates, so they can teach.” - Principal at a BTOIS partner school.

Classrooms and schedules were created to facilitate student learning and each BTOIS partner school demonstrated a relentless effort to preserve of instructional time. Time was scheduled for MTSS meetings, grade level meetings, longitudinal planning and PLCs. Teachers used the same language across grade levels to support student learning and executive function through reflection. For example, one school referred to “The Big 5”. While the specifics and complexity of the Big 5 varied across grade levels and subjects, it referred to the priority skills and mastery of concepts students should be able to access after a lesson and served as a tool to support outcomes. Teachers and staff also used the Big 5, so this sustained a cohesive school culture. Another school utilized “I can” statements at the start of a lesson and later to reflect on mastery or supported practice. Classroom environments all had clear areas for whole class instruction, small group work, areas for centers or individual or partner practice. All decorations in the classrooms were used to activate knowledge or remind students about character.

Images 1 and 2: Big 5 examples for students and teachers



Images 3 and 4: Academic concepts illustrated for student use

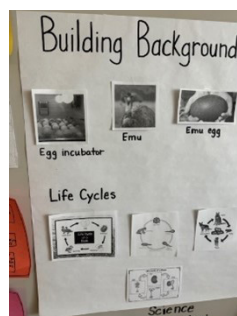
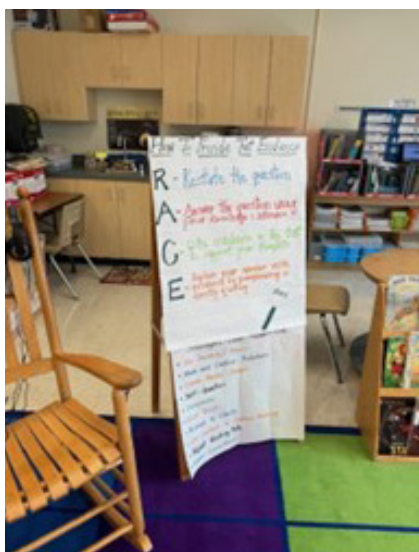


Image 5: Emotional bank account display to encourage support in the school environment and character development

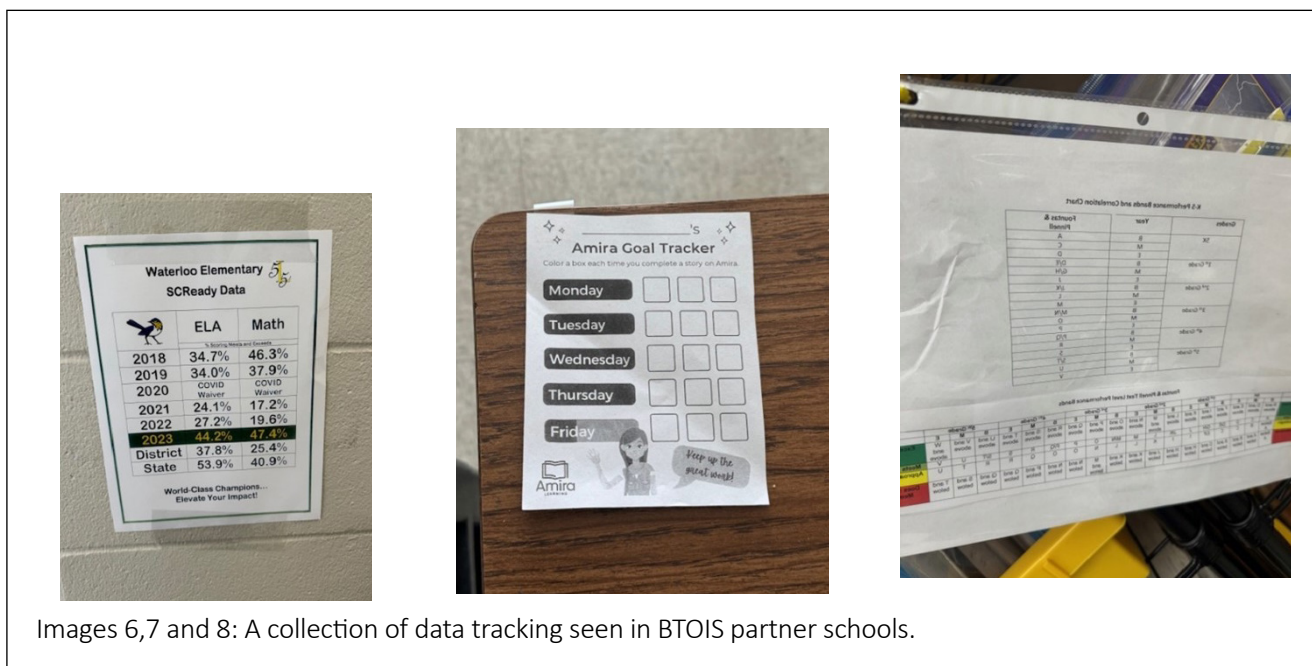


Consistent Use of Data

All BTOIS partner schools displayed data on the walls and used data to celebrate growth and to make strategic decisions to increase academic achievement. Data visibility was central to use as a tool to make instructional decisions and monitor progress, but also to motivate students and teachers in a non-punitive way. Data was used in aggregate form and individual student data was used in a consistent way during regularly scheduled meetings for instructional coaches, leaders and teachers. Data compels a sense of urgency in the school culture and is utilized for accountability within the school buildings and district as well as in the state accountability structure.

Students are involved in data use at the building level and also to promote growth to meet individual goals as part of the culture of the BTOIS partner schools. One teacher reported a sense of supportive healthy competition in classrooms because of consistent data use to meet the vision and goals. “My students will get a little competitive---if one sets a goal to read 3 books at a certain level it’s not unusual to hear another student say, ‘I’m coming for 5 books this week!’” Some principals reported seeking out non-traditional data to answer the questions they have about how students are doing and what might be inhibiting well-being or academic success. There was never a report of using intuition to improve outcomes, rather frequencies were taken of behaviors indicative of need.

“I use data that answers the questions I want to know about---our SRO listens to scanners and knows if there’s been an event where our students are so we can be responsive when they come to school the next day. I know who’s regularly picked up late and who asks for more food at lunch. This tells me who might need different or additional supports.” - Principal at a BTOIS partner school.



Data is used for actionable interventions specific to students’ needs and collaboration across teachers and grade levels often occurs. Professional Learning Communities (PLCs) are developed with student needs and teachers’ skills so that they are relevant and immediately useable. Schools reported taking care to schedule around multiple intervention and/or special education service time so that students did not miss tier 1 instruction. A principal described how data informed instruction by saying “We have 45-minute blocks scheduled throughout the day for each grade level. So during that time, we call it “go time”. During that time, all tier one instruction stops, and that’s when we carry out the plan that we made in that PLC meeting. Here are the groups of kids that still aren’t performing on these standards. So we group them, we determine who’s (teacher) going to do what with them (students), and we carry that out during that 45 minute go time.... Our goal is for every student to have something that’s going to move them forward during that time.”

“But if there’s one thing I would, I would duplicate anywhere I went, is that data room where you’ve got every child’s name is on a board, and every single adult knows about that child, and every single adult knows everything about that child. And then you lead your teachers into that room to have those very vulnerable conversations about what is working for my kid, how I said that, how I did that, what questions I did, and then you require your teachers. We’re going to take the best practices from that conversation and we’re going to disseminate that across the grade level... And that is hard. It’s not complicated. There’s no tricks, but that is hard. You’ve got to do that to make meaningful, sustainable changes. You’ve got to be the leader that can be vulnerable, because the leader has to do that first. You can’t push your teachers in there and say, ‘Okay, y’all be vulnerable. Share your weaknesses’. I mean, (the principal) leads that by example.”

- Superintendent at a BTOIS partner school.

Culture

Culture refers to the implicit and explicit norms that shape actions and decisions within an environment. The BTOIS study illustrated that school culture was nested within and influenced the community culture in a reciprocal fashion.

School Culture

Teachers, principals, instructional leaders and parents reported that the school felt “like a family”. The culture in the school was one of connection and support demonstrated by celebrations of incremental progress, informative and honest feedback, both positive and for corrective purposes. Strong relationships and authentic care for each other characterize the school culture in each of the BTOIS partner schools. Students are greeted by name by every adult in the building from the janitors, coaches, cafeteria workers to their principals. One school reported that when a student lost a sibling in a traumatic event, the child wanted to go to school the next day to let her classmates know she was not injured and to be supported by her peers and school community where she felt safe. Another example of this authentic care for members of the school community was illustrated by a parent whose child required a fanny pack with medication after a medical procedure and was nervous to wear it to school. The principal of the school wore a fanny pack and welcomed the child back to school to normalize the experience, which made the child more comfortable. One teacher reported that her husband would traditionally pack up her classroom for summer break. When her husband passed away, the principal and assistant principal sent her on an errand that was a “wild goose chase” and when she returned to the building, they had packed up her room so she felt supported after her loss.

“Teachers speak to each other every day; we never walk by each other without speaking. The children see that. We support each other—each teacher in the school, whether it’s birthdays, baby showers, loss of a loved one—we make dinners, check in. We’re here for the major parts of life and we really know each other. Everyone knows here, don’t come around to chat before I’ve had my coffee, because they know me and after coffee, we can catch up.”

- A teacher in a BTOIS partner school.

Each principal reported coaching teachers to buy in to the culture of the school, and occasionally coaching teachers unwilling or unable to align actions with the mission, vision, and goals of the school to a new position. Principals also strategically recruited talented teachers who completed student teaching at the school or who they knew from previous positions. Teachers who didn’t agree with or align with the philosophy, mission or vision of the school left voluntarily or were replaced by an individual who shared the collective mindset. Every BTOIS partner school described a culture where each member of the school community was supportive of the collective vision to ensure that students have mastery of academic skills and knowledge aligned with the grade level learning standards. Buy-in across all members of the school community was evident.

“(The Principal’s name) does such a good job getting his teachers to be solution oriented. You know, a lot of times in a high poverty school, you become just completely consumed with all the outside forces that are causing your students not to be successful. And he really has led his people to be ‘there are no excuses’. When they (students) are here, we’ve got seven and a half hours and we are going to make them successful. And they believe it. Every single one of them believes it. That’s one thing. He has done a awesome job at creating that same mindset with his support staff, from his receptionist to the custodians to the teacher aides to everybody. They are all part of making sure that his students achieve as high as possible. And if you were to ask them (school staff), they would say that. I mean, they’re all educators here, every single one of them, and they all believe that.”

- Superintendent of a BTOIS partner school

Teachers in each of the BTOIS partners schools reported feeling empowered, supported, and heard. As needs and challenges arose, teachers reported feeling encouraged to solve and honestly communicate problems and/or solutions. Unencumbered time was protected, yet teachers in one school preferred to meet with instructional coaches and grade-level teams during this time. Building leadership listened to this preference and if the teachers opted to forgo unencumbered time, they could sign a paper confirming this was their choice and set meetings with instructional leaders during that time instead for increased collaboration. Collaboration within and across grade levels and teacher skills sets allows for increased collaboration and healthy communication about strategies that will support high achieving behaviors to solve academic challenges for students not on grade level.

"It's not really an incentive, but it is an incentive, if you're going to get great results with your kids and build relationships with them, all I'm going to do is check in and see what you need, right? Like, I'm going to let you do your job, because I trust you as a professional to do that." Principal at BTOIS partner school.

"During our PLC meetings weekly, we meet on Thursdays. The interventionist is in there, our administrators, myself, our teachers, that's when they determine who needs what. And sometimes it's the teachers will determine, then, 'okay, I'm going to have this group, so here's what I'm going to do', and that sort of thing. So it's a team effort in figuring out (what skills students need and how to teach them), and yes, that problem solving, what do we need to do with this time to give them (students) what they need.... The collaboration, having teachers willing to sit and collaborate and work with each other, and somehow building that ownership of all means all. And it's not your kids and my kids. They're our kids. And the problem is we need them to meet this goal. What are we going to do to meet that goal?" - Principal at a BTOIS partner school.

Each individual in the BTOIS partner schools viewed problems or challenges as information about a need that could be addressed through intentional actions and not a permanent condition or sentence to low achievement. Even if a systemic or multigenerational problem was not solved, the immediate environment a student was functioning in was improved so the child can be successful in school. This mindset is illustrated throughout several examples across BTOIS partner schools including one principal's solution to transiency by working with community partners to stabilize housing for single-mother families, another's participation in technical assistance to reduce absenteeism, and efforts to connect to students who are multilanguage learners and include their families in the school culture. One school reported a portion of the student population who speak a Russian dialect, making translation a challenge. A parent who also speaks the dialect and is fluent in English volunteered to shadow each student when they arrive at school. Over the first day, the parent supports a child she has never met through translation and facilitates learning some unfamiliar school norms such as how to get lunch from the cafeteria, where the restrooms are, etc. Another school with a high population of Spanish speaking students, hosts a family literacy night where read aloud books are given to families and read in English and Spanish. This practice provides books in the home, in English and Spanish which will facilitate literacy and family engagement in literacy rich activities.

Image 9: Multilingual Read-Aloud Night in English and Spanish



Image 10: Character expectation signs in English and Spanish in a school with a high Spanish speaking student population

"Overall, I think this (work) is an effort to provide for this community what it rightfully deserves and that is an institution (of public education) that it can be proud of. But also, that equips students to one day live the American Dream that so many of our society just don't have access to. And so, when we took on the mantle of leadership here we all were very committed to the idea of what it means for black and brown children to have high quality education to shift their trajectory. And that's what it's been about over the last five years. We've been working so our students have options and we've been given the power and knowledge and the confidence to be those leaders that we talk about (with our students) ...every single day."

- Principal at BTOIS partner school.

Community Culture

"Everyone is committed to reaching a shared vision by doing the same things." Community member at BTOIS partner school.

The characteristics of the community's culture, both those that facilitate student learning and those that inhibit, were seen and understood by the individuals at the BTOIS partner schools. The schools operated within the context of the community culture capitalizing on strengths, and engaging community members as partners to supplement and support student learning. Some stakeholders in the community include churches and business that can systematically provide volunteers to mentor or read with students, while others operate to raise funds to support the needs of the students in the school.

"We have a math intervention lab...First Presbyterian Church raised \$70,000 to help us create a math lab and pay the salary for individuals for one year. After proving the success of that model, the district agreed to funds to pay that position, but this is the last year of funding so we're going to look into funding that position a different way." - Principal at a BTOIS partner school

Connections between School and Community Culture

Members of the community were committed to the success of the school and students in it, and the school was commonly thought to provide value to the community. Similarly, characteristics of the community were valued by the school community. The school did not attempt to explicitly modify the community culture, but rather utilized a strength-based perspective of the unique characteristics that distinguish the community from other places.

Businesses allow employees time away from work to come mentor students on a consistent basis. Members of local churches and parents in the school also come to volunteer or send in needed items for classrooms such as paper or Clorox wipes. This practice moves from a scarcity perspective to a collaborative one and would not be possible if the school was not an open, warm place to be while communicating needs with community members.

Inter-related Nature of Culture and Other Themes

Culture is the foundation upon which all the other themes manifest. The culture of the school developed and maintained by the leadership team of principal, instructional team and superintendent sets high expectations that drive strong tier 1 instruction through a consistent use of data, thereby sustaining the school culture and promoting high achievement within the community culture.

"Well, one, I want a teacher that's going to fit in with our culture. First and foremost... I want a teacher that's not going to be afraid... 'I don't want to be in a tested grade or I'm afraid of the accountability'. I want someone that says, Nope, that's, what it's going to be, and I'm okay with that. I want teachers that are willing and want to collaborate with each other, because I think that's a huge part of the success, is you got to be willing to open up and share things you're good at, and be willing for other people to pour into you and share some things that they're great at. That makes us stronger. It's the culture. First and foremost. We can teach them (teachers) some skills, and we can develop teachers within that, but they've got to be willing to be a part of a team that we expect us to function at a high level, and we expect to get good results, and you got to be comfortable with that." - Principal at a BTOIS partner school.



Reconciling Differences in Year 1 and Year 2 Findings

There was one primary difference between the findings in the exploratory and confirmatory years of this study related directly to the schedule, but more broadly to leadership style and sustainability. In the exploratory Year 1 of the study teachers reported being empowered to change their schedule as they felt necessary to support the learning of their students. In the confirmatory phase of year 2 data collection, there was little authority over the schedule as intervention and differentiation occurred across grade levels in the school. As a result, if one teacher changed the schedule, it would disrupt the synchronized interventions that occur across the school, impacting multiple children.

Similarly in year 1, few principals discussed sustainability of the academic growth and achievement in their school should they move to a new position or retire. Conversely, most principals in the year 2 study had a succession plan for leadership in the school as they near retirement and were planning for sustained high academic achievement. Several principals in partner schools during the exploratory phase of year 1 transitioned to other positions, and in year 2 schools that had qualified as partner schools no longer met the criteria. It appears that leadership changes in BTOIS partner schools impact students achievement; however, this theory must be tested using additional data. For this reason, participating schools in the confirmatory phase of year 2 will be reviewed during the 2025-26 year and the theory will be updated to reflect if planning for sustainability and scheduling is seen to stabilize continuous high academic achievement and growth.

Other Findings of Note

Principals at each of the BTOIS partner schools across the exploratory and confirmation phases work incredibly hard in positions that have long hours and a great deal of emotional stress. Of the seven principals in the exploratory year 1 cohort, four transitioned to new positions and all principals in the cohort described symptoms of burnout. Inconsistent leadership inhibits sustained school success, so this finding is worthy of policymakers' time and attention. While many principals in confirmation phase year 2 described intentional efforts of self-care and succession planning like training assistant principals and instructional leaders so success is sustainable, factors that contribute to burn out remain. It is recommended that schools with new leadership are observed to see if high student achievement is maintained after transitions in leadership and that further research on preventing burnout be conducted and intentional efforts be piloted for principal retention in schools with greater than 75% poverty.

Discussion

While there were differences across the partner schools in the Beating the Odds Investigative Study, these differences were born from the same tenet of meeting students where they are to support their academic achievement. Students in different communities with different needs require strategies and solutions to support them in the context they are in. The framework for elementary schools holds across the exploratory and confirmatory years of the study, aligns with frameworks on leadership and culture, supporting children in poverty, and transforming schools for increased success.

Eight Critical Elements of Organizational Life

BTOIS showed that building leaders are paramount to improving academic outcomes for students in poverty. Research on leadership and organizational life describes strategy and culture as the primary influencers at the disposal of top leaders making these elements worthy of attention (Groysberg et al, 2024). The meta-analysis on leadership and culture published in 2018 and updated in 2024 entitled the Leader's Guide to Corporate Culture, states "Culture expresses goals through values and beliefs and guides activity through shared assumptions and group norms. Strategy provides clarity and focus for collective action and decision-making. It relies on plans and sets of choices to mobilize people and can often be enforced by both concrete rewards for achieving goals and consequences for failing to do so (Groysberg et al, 2024)."

"Getting everyone to buy in and be comfortable with here's where we are and here's where we want to be, and what are we going to be willing to put in the work to get where we want to be. I had to get staff to buy into that, or either, if you're not going buy in, then for yourself, you probably need to find somewhere else, but it fits me more within with what you want to do. So that was a challenge early on, and then even a few years into that, I felt like we're on that track."

- A Principal from BTOIS partner school.

Too often, culture seems elusive to leaders attempting to improve organizational performance, and in the context of BTOIS, allowing for that condemns educators and students in a culture of poverty and scarcity. While strategies are simpler and often managed well by leaders, it's often said that 'culture eats strategy for breakfast', so even when utilizing evidence-based best practices and sound strategies, culture can and must be managed by leaders to meet desired goals. Groysberg et al, define culture as:

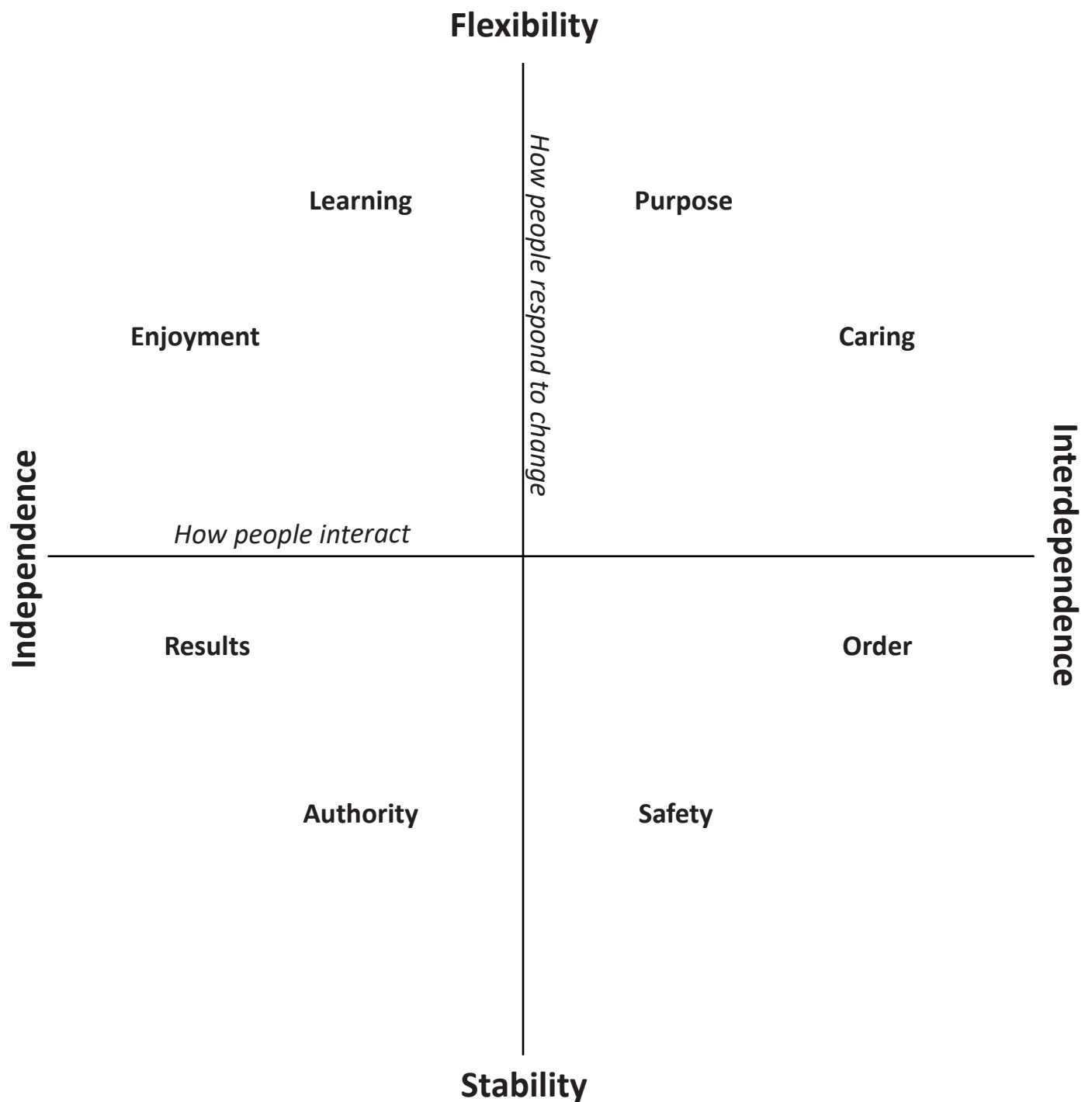
1. **Shared:** Culture exists across a group and resides in shared behaviors, values, and assumptions that generate group norms.
2. **Pervasive:** Culture permeates each level of the organization and is manifest in physical environments, group rituals, symbols, and stories. Culture is also present in unseen aspects of the school or organization in mindsets, motivations and unspoken assumptions.
3. **Enduring:** Culture directs the thoughts and actions of a group over time and is shaped by the collective life events and learning of the group. It develops through attraction-selection-attrition model. People are drawn to organizations with characteristics like their own; organizations select individuals with the same ideals who tend to fit in, and over time those who don't fit in leave.
4. **Implicit:** While some practices might be explicitly communicated, culture is subliminal in nature and people have the innately human capacity to recognize and respond to it instinctively.

Research has found that two dimensions that apply to organizational culture regardless of type, size, industry or location: people interactions and response to change. People interactions refer to an organization's orientation towards how often and how people interact with each other. This ranges from highly interdependent to highly independent interactions to achieve organizational goals. Response to change refers to an organization's priority of consistency or predictability as opposed to adaptability and flexibility. From these two dimensions, eight distinct styles apply to both culture and leadership. Leaders or organizations can embody more than one style, with some combinations being mutually sustainable and others require more effort to maintain.

8 Distinct Culture and Leadership Styles from The Leader's Guide to Corporate Culture

1. *Caring* focuses on relationships and mutual trust. Work environments are warm, collaborative, and welcoming places where people help and support one another. Employees are united by loyalty and leaders emphasize sincerity, teamwork and positive relationships.
2. *Purpose* is exemplified by idealism and altruism. Work environments are tolerant, compassionate places where people try to do good for the long-term future of the world. Employees are united by focus on sustainability and global communities; leaders emphasize shared ideals and contributing to a greater cause.
3. *Learning* is characterized by exploration, expansiveness, and creativity. Work environments are inventive and open-minded places where people spark new ideas and explore alternatives. Employees are united by curiosity; leaders emphasize innovation, knowledge and adventure.
4. *Enjoyment* is expressed through fun and excitement. Work environments are lighthearted places where people do what makes them happy. Employees are united by playfulness and stimulation; leaders emphasize spontaneity and a sense of humor.
5. *Results* is characterized by achievement and winning. Work environments are outcome related and merit-based places where people aspire to top performance levels. Employees are united by a drive for capability and success; leaders emphasize goal accomplishment.
6. *Authority* is defined by strength, decisiveness and boldness. Work environments are competitive places where people strive to gain personal advantage. Employees are united by strong control; leaders emphasize confidence and dominance.
7. *Safety* is defined by planning, caution and preparedness. Work environments are predictable places where people are risk-conscious and think things through carefully. Employees are united by a desire to feel protected and anticipate change; leaders emphasize being realistic and planning ahead.
8. *Order* is focused on respect, structure, and shared norms. Work environments are methodical places where people tend to play by the rules and want to fit in. Employees are united by cooperation; leaders emphasize shared procedures and time-honored customs.

Figure 1: Integrated Framework of 8 Distinct Leadership Styles



Styles that are adjacent on the integrated framework are more likely to easily coexist in organizations across people without much effort, while styles across from each other are less likely to be found together and require more organizational energy to maintain at the same time. Some styles can be mutually reinforcing while other combinations can be confusing for employees, requiring energy from strong leadership to maintain.

An organization's surrounding environment or context and its goals shape the kind of leadership that will be most efficient. When aligned with strategy and leadership, culture drives and sustains positive outcomes.

How the Integrated Framework Looks in BTOIS Partner Schools

The BTOIS partner schools for exploratory year 1 and confirmation year 2 appear to have a culture that strongly emphasizes caring and purpose. A results orientation can certainly be seen; however the BTOIS partner schools clearly stated their goal to improve academic achievement, which is a result. A broader purpose for attaining excellent academic outcomes is to ensure students meet their potential and “can access the American Dream” in adulthood. Order can be seen in the cultures of BTOIS year 2 partner schools in the stability of the structure of the school’s schedule. Competition is seen, which is often utilized in an authority culture. Risk-taking can also be seen, which happens in a learning culture. However, these are strategies that exist within the overall culture of caring and purpose to address the disadvantages that naturally exist within any culture.

Groysberg, et al summarized the advantages and disadvantages culture styles by describing how it typically appears in organizations. Table 1 shows the most common culture styles found in BTOIS partner schools.

“It’s like a family! We care about each other!”

“We are not going to love them into failure.”

“They are all our children.”

- quotes from BTOIS partner school teachers

Table 1: BTOIS Partner Schools most Defining Cultures Advantages and Disadvantages

Culture Style	Advantages	Disadvantages
Purpose: purpose-driven, idealistic, tolerant	Appreciation for diversity, sustainability, social responsibility	Overemphasis on long-term purpose and ideals may get in the way of practical and immediate concerns
Caring: warm, sincere, relational	Strong teamwork, engagement, communication, trust, and a sense of belonging	Overemphasis on consensus building may reduce exploration of options, stifle competitiveness, and slow decision-making
Results: Achievement driven, goal focused	Improved execution, external focus and capability building, and goal achievement	Overemphasis on achieving may lead to communication and collaboration break downs with higher levels of stress and anxiety

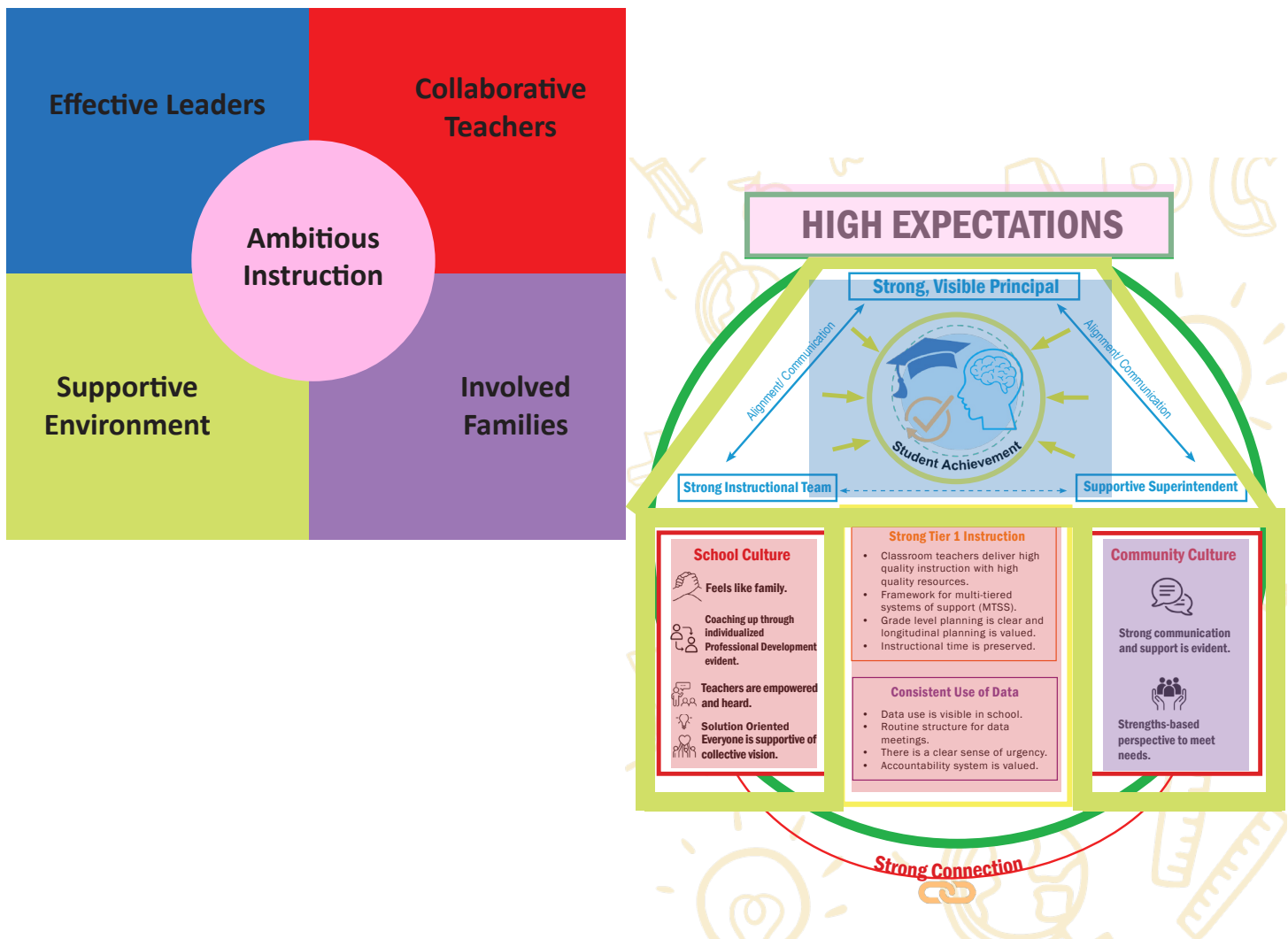
In future BTOIS efforts, it is recommended that an additional data point be collected asking school employees and parents to complete an organizational cultural profile evaluation. While researchers are able to align leadership and culture at these schools using observations, the lived experience as a participant in the school culture will have an important perspective. Additionally, if school employee or parent responses have a low or high degree of convergence or agreement, it will be telling because it is correlated with employee engagement and stakeholder orientation.

5Essentials®

The University of Chicago developed a framework of [5Essentials®](#) organizational conditions that influence student learning. The 5Essentials® factors for school improvement are effective leaders, collaborative teachers, involved families, supportive environment, and ambitious instruction. Research shows that schools strong in at least three of the five essential components were 10 times more likely to show substantial growth in academic achievement than schools weak on three or more of the five essential components. A low score on one of the five essential components reduced the likelihood of improvement to less than 10% ([UchicagoImpact](#)). The 5Essentials® strength or weakness on each component is measured using the 5Essentials Survey which has reliably predicted school success in elementary through high school levels improving graduation rates, freshman on-track measures, test score gains, and attendance rates. It is recommended that BTOIS partner schools interested in piloting the 5Essentials® be supported in doing so for sustainability or other schools with 75% or higher poverty ratio not scoring an Excellent Overall Rating on school report cards be invited to pilot.

This framework for school improvement resonates with the grounded theory developed for elementary schools in the Beating the Odds Investigative Study. Strong Leadership is aligned with the strong leadership team of a strong visible principal, strong instructional team and supportive superintendent components of BTOIS framework. Collaborative teachers of the 5Essentials are represented in the BTOIS theoretical framework in strong tier 1 instruction and consistent use of data, but most powerfully in the school culture. Involved families from the 5Essentials are included in the community culture of BTOIS. A supportive environment is represented in the leadership team, and well as the school and community components of the BTOIS theoretical framework. Ambitious teaching parallels high expectations.

Parallels of 5Essentials® framework and BTOIS theoretical framework



Center of Excellence to Prepare Teachers of Children of Poverty Best Practices

In 2004, Francis Marion University established a [Center of Excellence to Prepare Teachers of Children of Poverty](#) to empower teachers to address the challenges that covary with poverty in schools. The center has training and resources to empower teachers of students in poverty to use the 25 best practices identified by research to mitigate the effects of poverty. Table 2 defines the 25 best practices and denotes if there was evidence of and opportunity to observe these practices in BTOIS partner schools.

Table 1: Center of Excellence to Prepare Teachers of Students in Poverty Best Practices

Center of Excellence to Prepare Teachers of Students in Poverty Best Practices	Observed in BTOIS Partner School
<p>Best Practice 1, Build Relationships: There are immediate and long-term positive impacts of building supportive relationships with students as measured by both quantitative and qualitative instruments. When a positive relationship is established and maintained a student is more likely to attend school regularly, put forth greater efforts, encounter fewer disciplinary episodes and achieve at high levels.</p>	<p style="text-align: center;">Yes</p> <p>“In the mornings, we have where we have those that first 10 minutes while we’re eating breakfast, where we can sit and we can talk, we got to 10 minutes this morning. So it was important to get here on time. So you’re here on time, so you can have that time to talk and say, “Hey, good morning, here’s what’s happening...” They’re big on sports right now, everybody who’s playing football and basketball right now. So they’re, they’re getting to the age now where they’re learning those fundamentals. And they’re learning about teamwork. And they’re getting to play outside people. So they’re coming in, and they’re excited about it and say “hey, we have a game on Saturday, we play this team...so just building that rapport with them to know what’s going on, and then being able to support them on those weekends too. So they’re coming in and saying “hey—(Our teacher) was at the game Saturday!” They’re excited about that. So just building that rapport to let them know, like, we want you to succeed here in school, but also outside of school, but you have to have those characteristics to make sure that you know you’re doing both in and out of school.”</p>
<p>Best Practice 2, Increase Status: Status is the amount of honor or prestige a person has within their group and is included in Maslow’s hierarchy of needs. When teachers ensure that students have routes to high status in the classroom and school community, mastery of academic material becomes more efficient.</p>	<p style="text-align: center;">Yes</p> <p>“I started a system with a sticker chart and if they pass their cold read on Fridays, they get a sticker and if they get 5 stickers they get to go to the ‘sticker store’ and get a fancy sticker for their water bottle or their note book, and they are jazzed about it and it’s cool to earn stickers and they all want to and they can, so letting them in on it.”</p>
<p>Best Practice 3, Grow Emotional and Soft Skills: Emotional and soft skills such as self-regulation, social problem solving, and resilience are required for school and long-term success. While emotions are hard-wired, emotional responses must be taught. Educators who understand social emotional development and can provide instruction for learners empower students with a broad array of appropriate emotional responses for the school environment and other socially complex settings.</p>	<p style="text-align: center;">Yes</p> <p>“We have mental health specialists that are provided by the district so I have a student who is learning how to cope with anger, and one who is learning how to cope with separation.”</p>

Center of Excellence to Prepare Teachers of Students in Poverty Best Practices		Observed in BTOIS Partner School
Best Practice 4, Understand the Goals of Behavior: Research shows that students who chronically exhibit challenging behavior do so to accomplish a specific goal. The Center of Excellence to Prepare Teachers of Children of Poverty have synthesized research about persistently challenging behavior and found that there are four primary goals: attention, power, revenge, and inadequacy. Educators who understand that behavior communicates a need or attempts to meet a need are able to ensure that students have opportunities to achieve these goals and meet their needs in socially appropriate ways. This practice will reduce punitive responses to challenging behavior, thereby preserving relationships and supports growth of emotional and soft skills.		Yes “With children from backgrounds like ours come from you don’t always know what they’ve seen or been taught, so administration and the counselor try to figure out why a child is behaving this way and get to the root of the behavior, then support them because a lot of times for our kids, no one has taught them or modeled for them how to cope with a situation that didn’t go the way you wanted it to...”
Best Practice 5, Decrease Stress: Toxic stress alters brain chemical production and blood flow, and while it can occur in any demographic, it is more likely to affect students in poverty. Poverty increases the likelihood that children will experience traumatic stressors and becomes a roadblock to learning. Educators who are able to understand the impact of stress and teach stress-reducing strategies will help students perform better in school and live more productive lives.		Yes “My 15 minutes, I read, we do yoga—just to calm, with our 3rd through 5th graders.”
Best Practices 6 & 7: Motivate: Motivation can be measured as the sum-total of the value students place on the learning experience combined with the belief that they can be successful. When educators can 1. increase value of a learning experience by making it relevant and 2. create learning environments where students perceive themselves as successful, motivation and engagement in the learning process increase.	Best Practice 6, Motivate: Increase Hope and Expectancy of Success: Hope and optimism positively alter chemicals in the brain and influence decision-making and problem-solving abilities that contribute to a belief that one can be successful. Educators who implement practices to ensure that students have a sense of hope and an expectation of success understand are more resilient and understand that mistakes are not permanent. These students become more persistent learners who put forth required effort to be/become successful.	Yes “We’re building the foundations for them with their character traits, showing them that people care that their voice matters. And when we’re building those strong foundations here in elementary school, that way, when they go on from us, they feel equipped to make a difference.”
	Best Practice 7, Motivate: Increase Value: A belief that learning is important and relevant increases engagement and commitment to learning throughout challenges. Educators who implement practices that connect learning to real life and the interests of the students are more likely to have students who are persistent learners able to put forth effort required to succeed.	Yes “When students grow on their star or benchmark test, she (the principal) gives them incentives. So like they’ve had a Popcorn Party, snow cone party, a smores party, a dance party-- a couple years ago she brought a video game truck! Yeah, she’s she celebrates. She celebrates with things the kids like, she makes them feel good for making progress.”

Center of Excellence to Prepare Teachers of Students in Poverty Best Practices	Observed in BTOIS Partner School
Best Practice 8, Grow Mindsets: Students with a growth mindset believe that with effort, persistence, and effective strategies abilities and intelligence can be developed. Educators who cultivate a growth mindset develop students who are more likely to put forth effort, view mistakes as opportunities to learn and persevere through difficulties in school and life.	<p>Yes -“It’s never ok for kids to get a bad grade---it’s always let’s try this, let’s do that...the plans that I see (so kids can learn to be successful), it’s amazing.”</p> <p>“they (the teachers) see and expect the best in every child—they see the potential and not the limitations and see the best and expect the best in every child.”</p>
Best Practice 9, Accommodate: Students in poverty who struggle at school often do so because they are missing key resources or foundational knowledge that can help them succeed. Educators who understand the negative impact of absent resources and can identify, mitigate, and/or assemble a suite of accommodations for students who require them have more academic student success.	<p>Yes - All schools used data to assemble interventions and extra practice to build foundational knowledge and background skills.</p>
Best Practice 10, Maintain High Expectations: High expectations and a belief that students can achieve and maintain high educational standards for all students in a school drive a culture of achievement and resiliency regardless of poverty and covarying challenges. High expectations are the result of a belief that with time and appropriate supports, all students can learn and meet high standards for learning, achievement and future success.	<p>Yes -“We are not going to love them into failure!”</p>

Center of Excellence to Prepare Teachers of Students in Poverty Best Practices

Best Practice 11, Decrease Health Impacts: Students in poverty are far more likely to suffer from the negative effects of life in unhealthy environments and/or the absence of a medical or dental home. Educators who understand the connection of good physical and emotional health with academic success create connections for students and their families to resources that can help mitigate the negative impacts of poor health.

Observed in BTOIS Partner School

Yes - Schools have mental health counselors and some have dental visits at the school, schools report hearing and vision screenings for students

“And our assistant principals in charge of MTSS meetings, and I have several children that are all in green, looks great on paper, but I see some things that concern me enough that we address it because she (the assistant principal) wants it caught NOW. let's see if the child needs to go to the doctor, then let's do it. Let's get it done in kindergarten. If they need their eyes checked. It could be an issue with that. If you know it could be you know that they need, maybe other behavior interventions, that kind of thing, and it's all addressed, even though the data looks good on paper, yeah, what I'm seeing in the room can tell a whole different story, and I'm free to bring that up.”

Center of Excellence to Prepare Teachers of Students in Poverty Best Practices

Best Practice 12, Build Family/Community Partnerships: Students are more successful when their family members are positively engaged with the educational environment. Community partnerships lead to greater school success for the entire student population. When educators and school leaders use goal-focused family and community engagement strategies are more likely to cultivate a positive school community that leads to academic and life success.

Observed in BTOIS Partner School

Yes - “We set goals in the MTSS meeting, sure the parent is, you know, part of the process. Okay, we always let the parents speak first in the meeting. Are you seeing some issues? Do you have any concerns? And then, you know, we kind of lead into, well, this is kind of what we're seeing. And nine times out of 10 they're like, you know, yeah, you know, at home, I can't get them to do their homework. They can't sit still. They're not attending. They're not, you know, I have to drag it out of them, all these kinds of things. And I'm like, Okay, well, this is also what I'm seeing, you know, in the classroom. And then we work together to set a goal. I'll have a goal for the classroom, but then the parent leaves with goals too. Okay, so it's not just the teacher is going to do it, yeah? Now what are you doing? Mom, what are you going to do, dad?”

Center of Excellence to Prepare Teachers of Students in Poverty Best Practices	Observed in BTOIS Partner School
<p>Best Practice 13, Proactively Guide using “ME” Strategies: Research indicates that proactive guidance strategies can positively impact classroom culture and community, and ultimately the academic success of learners. Educators who anticipate and plan for the needs of students are more likely to engender a more collaborative and conflict-free learning environment that sets the stage for academic success. A primary cause of student misbehavior is teacher miss-steps. Teachers change their own behavior and create a learning environment that promotes student success with high rigor.</p>	<p>Yes</p> <p>“And so building that relationship and then feeling comfortable telling me when things are going on at home or drama they're having that helps me stop future behavior problems in the classroom, because I know what's going on. And I will (know), they said that to them yesterday, so they're not going to speak to them (today). And they're going to want to say this (and argue). So it kind of helps me, so I can stop it (behavior problems) before it happens.”</p>
<p>Best Practice 14, Make Learning Fun: Dopamine is one of four neurotransmitters that signals the brain about the worth of an experience which directly impacts motivation to begin work and satisfaction of completion. Teachers who understand the connection between pleasure, joy and motivation craft learning experiences with this in mind because students work more enthusiastically and persistently when pleasure is associated with a task.</p>	<p>Yes</p> <p>“And we celebrate achievement, but it’s not just a test score—I want their experience around gaining academic knowledge to be one of bliss!” Teacher at a BTOIS partner school</p>
<p>Best Practice 15, Build Background Knowledge: Background knowledge has also been viewed as a set of skills, vocabulary, and experiences that provide a foundation and serve as a gatekeeper for future learning. Research indicates that neural networks are built as information is received. Educators who understand that absent background knowledge can be built, and that it takes time and practice to do so, create learning environments that support the development of new neural structures and establish school and class policies and practices that encourage acquisition and mastery of background knowledge.</p>	<p>Yes</p> <p>“We are intentional... (instructional leader’s name) will say ‘this group of students needs to be on this level to build these skills, so those like-students are grouped together that is where they and start.’ If it’s math—this sweet woman took a whole summer on her own time, and took our state standards... she literally took all the math standards for every grade level and created a below grade level, on grade level, above grade level small group instruction lesson. With resources and assessments to hand to the teachers, by topic. So for that 30 minutes, we expect you to teach deeply...then you have the assessment to see if they’ve got it.”</p>
<p>Best Practice 16, Grow Prefrontal Cortex Skills (Executive Function and Memory Trace): Executive function involve cognitive strategies that include analyzing, problem solving, activating for work, prioritizing, assessing risk and delaying gratification. The prefrontal cortex is the part of the brain responsible for the cognitive strategies of executive function, and it does not fully mature until early adulthood. It is best practice for elementary educators to create learning environments that support the growth of executive function without punishing it’s absence in young learners. Memory trace is a complex cognitive process that refers to encoding, storage, and retrieval of information in the brain. Repeated, meaningful exposures strengthen neural coding. Educators who understand memory development and use memory-enhancing strategies will enhance learning for students.</p>	<p>Yes</p> <p>“The kids want to come, and plan to participate, then they come home and are excited about what they’ve accomplished!”</p> <p>“If you ask any of these kids, you know, ‘what is my goal I need to reach, and then what is my stretch goal’? And they will all know that, yeah, so that self monitoring is really powerful for those kids.”</p>

Center of Excellence to Prepare Teachers of Students in Poverty Best Practices	Observed in BTOIS Partner School
<p>Best Practice 17, Align Instruction and Assessment: School accountability is largely centered upon student achievement as measured by standards-based assessments. Educators who methodically unpack standards in an effort to understand the intended cognitive level of Bloom’s taxonomy and level of rigor according to Webb’s Depth of Knowledge are more likely to plan instruction and assessments that focus on outcomes that are measured in standardized assessments.</p>	<p>Yes</p> <p>“And I think it made a big difference is to put some of those test prep lessons as lessons on the shelf. When you do the metal insets (manipulative) for example with fractions, then your recording will be a test prep question. You know, stated like a test would state it and that has the same content knowledge or skill knowledge...”</p>
<p>Best Practice 18, Purposefully Teach: Instruction that is purposeful with an identified goal with a complete instructional process focused squarely on that goal results in better outcomes for students in poverty. The entire instructional process---data collection that informs instruction, teaching, and assessment must all be driven by the defined goal.</p>	<p>Yes</p> <p>“Our phonics program we use tells me every single day, which kids got it, which kids need a little bit more support, and which kids would benefit from me pulling a small group and reteaching it completely.”</p>
<p>Best Practice 19, Explicitly Teach: Teacher-directed, explicit instruction is systematic, direct, engaging and success-oriented. When used effectively, it can successfully accelerate achievement for all students. Educators who strategically employ explicit learning situations provide modeling that offers students a clear, multi-sensory model for learning skills or concepts.</p>	<p>Yes</p> <p>During classroom observations explicit, direct instruction was observed.</p>
<p>Best Practice 20, Question Strategically: Effective questions posed within the learning environment elevate cognitive rigor. No longer only utilized to assess what students know, best questions engage the learner, prompt deep study and expand learning. Educators who employ effective questioning techniques will challenge students to demonstrate and communicate their thinking and learning.</p>	<p>Yes</p> <p>Observed in small literacy groups</p>
<p>Best Practice 21, Use Data and Feedback to Drive Instruction: Data collected and analyzed provide direction for goals and instructional decision-making. Educators who systematically and authentically use a four-step improvement cycle that includes data collection, analysis, planning and implementation are able to make informed adjustments for each student.</p>	<p>Yes</p> <p>“We know at the beginning of the school year what MTSS tier students are in, if they have an IEP, 504, MLL have speech or OT services and if they’ve been retained. Teachers get data from previous year (reading and math MAP, and core phonics survey from LETRS), then there’s more data (color coded) and we can look at a child all the way across fall and winter... and really look at one student and see if they are on track and how interventions are working... We use archival data to build supports for this year.”</p>

Center of Excellence to Prepare Teachers of Students in Poverty Best Practices	Observed in BTOIS Partner School
<p>Best Practice 22, Infuse the Arts: Arts education, including dance, music, theatre, media arts, literature, design and visual arts is a core academic subject and an essential element of a complete and balanced education for all students. Educators who value arts education understand its link to neural development and positive academic and social outcomes, and its ability to establish a more level playing field for learners who will not otherwise have access to enrichment experiences.</p>	<p>Yes</p> <p>Each school has related arts classes and some have afterschool programs</p>
<p>Best Practice 23, Use Technology Effectively: Technology is positioned as a rapidly changing component of formal education programs. Educational leaders and teachers who understand the impact of technology and the evolving resources and associated challenges are able to make informed decisions about questions related to policy, curriculum, and practice.</p>	<p>Yes</p> <p>“In one of our staff meetings, we made a video as a teacher about how we wanted our classroom to be. And then so I just gave my students criteria, what have they had to do in their video: They had to state their opinion, give the reasons why, and then just to add, like, the video aspect, stuff that had, like, a graphic or something, yeah, and they actually, they tried and they did it! Their videos are very short, but it's first grade.</p>
<p>Best Practice 24, Grow Language and Literacy: Language and literacy skills are identified as those that are critical to success in all content areas, and students who have these needed skills are more likely to be successful in school and in life. The body of educational neuroscience termed the “science of learning” provides guidance for best practices for growing these critical skills. Educators who understand how the brain learns to read and how to motivate for authentic student engagement in language and literacy learning can build these necessary skills.</p>	<p>Yes</p> <p>LETRS training and intervention efforts</p>
<p>Best Practice 25, Lead: Educator leadership extends beyond the traditional school or district leaders. Collaborative teacher leadership assumes that influence can extend beyond the classroom and educators can help change school culture by assuming a range of roles and responsibilities that support school and student success.</p>	<p>Yes</p> <p>I want teachers that are willing and want to collaborate with each other, because I think that's a huge part of the success, is you got to be willing to open up and share things you're good at, and be willing for other people to pour into you and share some things that they're great at. That makes us stronger. It's the culture.”</p>

Visible Learning

John Hattie and colleagues conducted a meta-analysis of teaching practices and strategies that most impact academic achievement and learning. This research utilizes a statistic known as effect size to indicate the power of an influence on student achievement, and an effect size can be positive or negative. In the Illustrated Guide to Visible Learning, Hattie states that “the average influence of all the things we do in school is about 0.40.” Meaning that effect sizes over 0.40 have the greatest potential to improve learning outcomes for students, and those below 0.10 have a negative effect on achievement. From this research that took place over decades and continues to grow in the [Meta*](#) database, Four Big Ideas emerged:

1. Climate first, learning second, achievement third
2. Students should drive their learning
3. Know thy impact
4. Collective responsibility for learning.

These Four Big Ideas are aligned with both the theoretical framework developed from findings of the BTOIS, but also the 5Essentials. Climate, relationships, strong tier 1 instruction with high quality instructional materials and culture and leadership that fosters collaboration to support all student learning are themes that resonate across these frameworks.

The Four Big Ideas become more specific when considering the 11 Signature Practices of Visible Learning.

Signature Practice 1, Classroom and School Climate

Expectations play a central role in classroom and climate that are conducive to high achievement. Parent expectations that their child can achieve have an effect size of 0.50, teacher expectations that are high for all students have an effect size of 0.90, and student expectations of their own achievement have an effect size of 1.23. This tells us that when teachers and families have high expectations for students in a manner that fosters students’ high expectations of themselves it is a very powerful influence in classrooms.

High expectations are a central component of the BTOIS framework, aligned with the 5Essentials element of ambitious instruction, and Best practices 6, 7, 8 and 10 from the Center of Excellence to Prepare Teachers of Students in Poverty (Motivate students by creating environments where students see themselves as capable and successful, increase hope, provide for a growth mindset, and maintain high expectations).

School climate that facilitates belonging has an effect size of 0.46. Belonging was discussed in many focus groups where parents discussed their children feeling like an important part of the classroom and school community, and teachers reporting that students will return to school after a traumatic event to prevent classmates from worrying about them. Classroom cohesion has an effect size of 0.66. School climate includes teacher relationships, and throughout BTOIS teachers illustrated the “school feels like family” and “they are ALL our children”, and Hattie’s research shows 0.62 impact on student teacher relationships, and the student support effect size being neutral at 0.32. Best practice 1, 2, 3, and from the Center of Excellence to Prepare Teachers of Students in Poverty are to build relationships, increase status in the classroom, and grow emotional soft skills which are seen throughout the BTOIS data. Belonging and relationships also align with the 5Essential elements of supportive environment and collaborative teachers.

Signature Practice 2, Teacher Clarity

Teacher clarity in both expectations and instruction allows for students to better plan, predict, set goals, and judge their own learning, thereby facilitative executive function and students driving their own learning. Teacher clarity is an umbrella term for the most crucial elements of teaching effectiveness and overall has an effect size of 0.85. Ensuring students understand the criteria (effect size 0.88), explaining content (0.70), teacher decisions based on assessment of student learning and organizing instruction so that it is built systematically, logically, and intentionally (both have an effect size of 0.64) are the most influential elements of teacher clarity.

Teacher clarity aligns with the strong tier 1 teachers and consistent use of data found in the BTOIS, and with ambitious instruction in the 5Essentials framework. Best practices 9, 15, 17, 18, 19, 21, and 24 from the Center of Excellence to Prepare Teachers of Students in Poverty are reflected under the umbrella term of teacher clarity.



Signature Practice 3, Phases of Learning

Hattie describes learning evolves and begins at the surface level of understanding and with intentional experiences grows to deep learning. This requires students to make connections between and among concepts and skills they are learning and requires a transfer of both knowledge and skills. Formal discussions and Jigsaws have the greatest influence on the transfer of knowledge (1.20 and 0.82 respectively). These practices were both seen and described in BTOIS data collection, and are represented in Best practices 15, 16, 18, 19 and 20 from the Center of Excellence to Prepare Teachers of Students in Poverty. Similarly they are aligned with the 5Essentials element of ambitious teaching.

Signature Practice 4, Teaching Students to Drive Their Own Learning

Hattie has developed six characteristics of students who drive their own learning which has an effect size of 0.96. These characteristics are:

1. Know their current level of understanding
2. Know where they are going and are confident they can get there
3. Select tools to guide learning (graphic tools and concept maps have a 0.62 effect size)
4. Seek feedback and recognize errors or opportunities to learn
5. Monitor their own progress and adjust their learning
6. Recognize their learning and knowledge and can teach others.

These characteristics were taught and fostered in the BTOIS partner schools and were facilitated through a culture that used data and spoke with students about achievement data and goals. These conversations were guiding children to take more ownership over their own learning. Signature Practice 4 aligns with the outcomes of strong tier 1 instruction and consistent data use in the BTOIS grounded theory framework and align with best practices 16 and 18 from the Center of Excellence to Prepare Teachers of Students in Poverty. They are also reflected in the ambitious teaching and supportive environment components of the 5Essentials.

Signature Practice 5, Teaching with Intent

Instructional strategies must impact learning or they must be changed, so teaching with intent refers to selecting, using, and adjusting instructional strategies to meet the intent of instruction, which is student learning. Collaborative learning (effect size 0.45) requires sufficient surface knowledge before students can appropriately engage in tasks, and can be facilitated through other strategies with high impact including reciprocal teaching (effect size 0.74), classroom discussion (effect size 0.82), constructivist teaching strategies (effect size 0.92) and jigsaw (effect size 1.20).

The influence of these instructional strategies provides specificity for the element of ambitious instruction in the 5Essentials, and evidence or report of these strategies being used in BTOIS partner schools was reflected in the grounded theory element component of strong tier 1 instruction. Teaching with intent aligns with best practice 18, Purposefully Teach, from the Center of Excellence to Prepare Teachers of Students in Poverty.

Signature Practice 6, Practice and Over-Learn

Practice with deliberate feedback and intentional use and reflection of feedback can be an important part of the learning process. As students are beginning to learn content they are said to be in the acquisition phase, and move to fluency when they can complete a task correctly consistently. From there they move to the maintenance phase where learning is sustained over time, then generalized and can be completed correctly in different contexts. Moving through these phases of mastery requires practice, and repeated practice can support students automating skills and knowledge leaving more working memory to make connections across content and build on knowledge. Deliberate practice which includes meaningful use of specific feedback and guided activities to mitigate errors in thinking, has an effect size of 0.49.

Teachers in BTOIS partner schools understand the importance of feedback in practice opportunities that are offered in homework. One instructional leader said “We don’t give a lot of homework, because unless mastery is really there, because practice doesn’t make perfect it makes permanent. You can practice something incorrectly and then we’re worse off than we were before.” These statements illustrate the strong tier 1 instruction reflected in the grounded theory of BTOIS, and ambitious instruction of the 5Essential elements. Practice and over-learn aligns with best practices 16 and 19 from the Center of Excellence to Prepare Teachers of Students in Poverty.

Signature Practice 7, Feedback

Effective feedback has an effect size of 0.51 and can support the growth and development of reflective skills in students and executive function. Strong feedback is:

1. Goal referenced- helps students advance toward stated goals
2. Tangible and transparent- if students are having difficulty illustrate their performance and the goal performance
3. Actionable- outline next steps and give the chance to strengthen work
4. User friendly-make sure students understand the feedback and don't use jargon
5. Timely- delayed feedback brings with it memory challenges, but immediate feedback may make students teacher dependent
6. Ongoing- feedback that occurs throughout learning allows for students to adjust their performance
7. Consistent- align feedback to rubrics, exemplars and success criteria
8. Future focused- ensure that students understand this feedback can influence future efforts for continuous improvement and lifelong learning

Strong feedback is received differently depending on the relationships you have with students and there are four conditions that increase the likelihood that feedback will work: care, credibility, clarity, and communication. Reinforcement and cues have an effect size of 1.01. These were observed in BTOIS partner school classrooms, but also through larger celebrations that reinforce both skill and effort/approaches to learning. Feedback is part of the strong tier 1 instruction component of the BTOIS grounded theory. Strong feedback is also aligned with the element of ambitious instruction of the 5Essentials and is best practice 19, Explicitly Teach from the Center of Excellence to Prepare Teachers of Students in Poverty.

Signature Practice 8, The Power of the Collective

Hattie's research describes a reciprocal relationship between individual and collective efficacy, where as one gets stronger, so too does the other. The group's shared confidence in the capacity of the class or school together to complete the necessary steps to accomplish a goal influences the individual's belief in oneself and vice versa. Efficacy is fueled by teacher credibility which has an effect size of 1.09. PLCs build both credibility and collective efficacy across teaching staff and in classroom communities.

The power of the collective illustrated by the school culture and leadership and sustained by PLCs and daily practice with a solution orientation are primary themes in the BTOIS grounded theory. The power of the collective is also represented in the collaborative teachers element of the 5Essentials, and is adjacent to the best practices of building relationship and maintaining high expectations (1 and 10) from the Center of Excellence to Prepare Teachers of Students in Poverty.

Signature Practice 9, Leading and Learning

School building and district leaders have a great impact on the school climate and culture that impacts the learning lives of students. Some high impact practices that leaders engage in include: leading teacher learning and development (effect size 0.84), establishing goals and expectations (effect size 0.42), and ensuring quality teaching (effect size 0.42). Leader credibility in schools has five major components: trust, competence, dynamism, immediacy, and forward thinking. All of these qualities were observed in principals and instructional leaders of BTOIS partner schools, and each of the impactful strategies were observed and reported. Strong leadership is a central element of the BTOIS grounded theory framework, and is also represented in the 5Essentials component of effective leaders. Best practice 25, lead is adjacent to this signature practice as it refers to teachers leading to shape culture; however, the qualities and strategies described in this best practice are similar.

Signature Practice 10, Implementation

Various strategies and influences have the potential to impact learning and achievement in schools; however, they must be implemented to influence student learning with progress monitoring. Fidelity of implementation requires reflection, and coaching. How high probability of impact strategies are implemented and used in schools determines an impact on student achievement; therefore, the appropriate high probability strategies must be implemented soundly for student achievement to improve.

BTOIS partner schools demonstrated this knowledge through their MTSS meetings and data discussions that shaped instruction. The practices of coteaching and teacher observation and reflection also support sound implementation of appropriate instructional strategies. These elements are reflected in the Strong Tier 1 Instruction section of the grounded theory framework for BTOIS partner schools. This is reflected in the ambitious instruction element of the 5Essentials and best practices 19 and 21 from the Center of Excellence to Prepare Teachers of Students in Poverty.

Signature Practice 11, Evaluative Thinking

Teachers must use evidence that a practice is working to determine if they will modify or continue to use it, and this skills has been described as data driven decision making or evaluative thinking. Hattie describes evaluative thinking as:

1. Being nosy with a reason: Educators must know the impact of decisions on student learning
2. Building an evidence base for learning: Educators must continuously generate visible data that makes student thinking and learning visible
3. Noticing: While generating visible evidence of thinking and learning, educators must recognize what is working. This is best done in community of colleagues.
4. Acting: Educators must make sense of data and act upon ensuring foundational skills are mastered.

Evidence of evaluative thinking is seen through the data consistently used and displayed in the BTOIS partner schools and the MTSS meetings and data walls. Teachers in BTOIS partner schools met within grade levels and longitudinally with instructional coaches and administration to analyze and make instructional decisions using data. This is reflected in the BTOIS grounded theory in the consistent use of data component and the ambitious instruction section of the 5Essentials. Evaluative thinking is also listed in best practice 21, use data to drive instruction, from the Center of Excellence to Prepare Teachers of Students in Poverty.

Table 2: Visible Learning Signature Practice Alignment with Best Practices from the Center of Excellence to Prepare Teachers of Students in Poverty

Visible Learning Signature Practice	Best practices from the Center of Excellence to Prepare Teachers of Students in Poverty
1. Classroom and School Climate	6. Motivate: Increase Hope and Expectancy of Success 7.Motivate Increase Value 8.Grow Mindsets 10.Maintain High Expectations
2. Teacher Clarity	9. Accommodate 15.Build Background Knowledge 17.Align Instruction and Assessment 18.Purposefully Teach 19.Explicitly Teach 21.Use Data & Feedback to Drive Instruction 24. Grow Language and Literacy
3. Phases of Learning	15. Build Background Knowledge 16.Grow Prefrontal Cortex Skills (Executive Function and Memory Trace) 18.Purposefully Teach 19.Explicitly Teach 20.Question Strategically
4. Teaching Students to Drive Their Own Learning	16.Grow Prefrontal Cortex Skills (Executive Function and Memory Trace) 18.Purposefully Teach
5. Teaching with Intent	18. Purposefully Teach
6. Practice and Over-Learning	16. Grow Prefrontal Cortex Skills (Executive Function and Memory Trace) 19.Explicitly Teach
7. Feedback	19. Explicitly Teach
8. The Power of the Collective	1.Build relationships

	10.Maintain High Expectations
9. Leading and Learning	25.Lead
10. Implementation	19.Explicitly Teach 21.Use Data and Feedback to Drive Instruction.
11. Evaluative Thinking	21. Use Data and Feedback to Drive Instruction

Differences in Signature and Best Practices

Several best practices from the Center of Excellence to Prepare Teachers of Students in Poverty are not explicitly represented in the signature practices of visible learning. Specifically best practices 4. Understand the goals of behavior 5. Decrease stress 11. Decrease health impacts, 12. Build family and community partnerships, 13. Proactively guide using “ME” strategies, 14. Make learning fun, 22. Infuse the arts and 23. Use technology efficiently are alluded to, but not specifically addressed. This does not mean these practices don’t have value in high poverty schools, but rather Hattie’s work is built from classroom practices to facilitate learning so some important variables like physical health do not fall within the scope of this research. They do however align with broader tenets of the big ideas without being addressed in a focused manner in the signature practices. Similarly, the 5Essentials element of involved families was not expressly addressed in the signature practices; however, family engagement is reflected in the big ideas related to collective responsibilities for learning and climate first.



Conclusion and Next Steps

Using the selection criteria that has already been established, no middle schools were identified as potential partners in BTOIS. Considering that math standards in South Carolina are changing, researchers will identify middle schools after new standards have been put in place and curricula and assessments have stabilized.

Next steps or a future research agenda will be developed from member discussion at the EOC retreat held in August 2025. Staff recommended options for consideration include:

1. Pilot efforts in schools that meet the BTOIS eligibility criteria but have an overall report card rating of Below Average or Unsatisfactory to study the components of the BTOIS grounded theory that have demonstrated a positive impact in academic achievement. Options include leadership and culture efforts while utilizing strategies of the 5Essentials, Visible Learning, and Best Practices from the Center of Excellence to Prepare Teachers of Students in Poverty. After pilot efforts and monitoring progress using the overall rating as a measure of improvement, characteristics of school culture and leadership will be aligned with the most powerful strategies.
2. It is recommended that school employees and parents complete an organizational cultural profile evaluation to determine leadership and culture characteristics in BTOIS schools using the organizational culture profile developed by Groyberg et al. This data will include stakeholders in determining the most prevalent of the eight distinct leadership and culture styles referenced in this study.
3. Additional research on leadership transition and effective principal retention should be studied further and piloting efforts be considered for schools that meet the Beating the Odds criteria but have an overall rating of Excellent or Good.
4. Using data from elementary BTOIS partner schools, middle school achievement will be analyzed to explore the impact of elementary school practices and skills on students transitioning to middle school.

Appendices

Appendix A: Study Description for Stakeholders

BTOIS School Takeaway Information Sheet

Appendix B: Interview Questions:

Principal Interview Protocol:

First congratulations on the success of your school. Thank you for being here today and providing us with more information about the success at your school. Based on criteria developed by the staff of the SC Education Oversight Committee, your school is being considered as a school that is Beating the Odds. This designation means that based on the percentage of Pupils in Poverty at your school, your school is exceeding expectations on the School Report Card. We want to understand in more detail how you do your work, especially when you have felt you have been successful and when you have felt challenged. We may ask more probing questions during the interview based on your responses. There is no wrong answer. Our hope is that others will learn from your school's success, and we hope to tell part of that story. This interview is scheduled for 45-50 minutes. Again, thank you for your participation and providing us with more detail on the successes of (Name of School). If you are ready, we will begin.

Questions to facilitate conversation:

1. How long have you been principal of this school (including this current year)? What was your position prior to this year? If another district, what district?
2. In one sentence, what is the vision for your school? How do you support this vision for your school?
3. What resources does your school receive from the district to support success at your school?
4. What are the three (3) most critical actions you have taken to accelerate growth at your school?
5. How do you use data to improve student performance? How do your teachers use the data?
6. What do you do to facilitate teachers work together to improve teaching and learning? How do you develop teachers to lead instructional change in your school?
7. When you interview for a teacher, what qualities do you look for?
8. What are your expectations for student performance? How do you hold teachers accountable for student performance?
9. How is the budget at your school developed? How much participation and influence do you have on your school's budget and expenditures?
10. What challenges have you faced at this school? What actions have you taken to overcome these challenges?
11. What professional learning have your teachers had over the past three years? Is this a district initiative? Do you provide other professional learning for your teachers outside of what the district provides? How is this professional learning implemented, e.g., during the summer, during planning time, on Saturday, during professional learning days?
12. What are you most proud of at your school?
13. Is there anything else you would like to add regarding the success of your school?

Instructional Leaders Interview Protocol:

First congratulations on the success of your school. Thank you for being here today and providing us with more information about the success at your school. Based on criteria developed by the staff of the SC Education Oversight Committee, your school is being considered as a school that is Beating the Odds. This designation means that based on the percentage of Pupils in Poverty at your school, your school is exceeding expectations on the School Report Card. We want to understand in more detail how you do your work, especially when you have felt you have been successful and when you have felt challenged. We may ask more probing questions during the interview based on your responses. There is no wrong answer. Our hope is that others will learn from your school's success, and we hope to tell part of that story. This interview is scheduled for about an hour. Again, thank you for your participation and providing us with more detail on this school's successes. If you are ready, we will begin.

Questions to facilitate conversation:

1. How long have you been in your instructional leadership position of this school (including this current year)? What was your position prior to this year? If another district, what district? Can you tell us about the path you took?
2. What curriculum does your school use for ELA? For math? How do you assist teachers with the implementation of these curricula?
3. What do you see as your daily responsibilities as an instructional coach/interventionist?
4. What are the three (3) most critical actions you have taken to accelerate growth at your school? How did you accomplish these things? What has been the process for implementing these actions?
5. How do you use data to improve student performance? How do your teachers use the data?
6. What do you do to facilitate teachers work together to improve teaching and learning? How do you develop teachers to lead instructional change in your school? Do teachers have collaborative planning? How do you develop trust in teachers?
7. How is homework handled at your school?
8. What are the expectations for student performance? What actions do you take to hold teachers accountable for student performance? Do you have any pushback from teachers? If so, how is this handled?
9. How are parents/families involved in your school? Do you have any outside community groups that support your school? If so, who are they and how do they support the school?
10. What are the most significant challenges have you faced at this school? What actions have you taken to overcome these challenges?
11. What professional learning have your teachers had over the past three years? Is this a district initiative? Do you provide other professional learning for your teachers outside of what the district provides? How is this professional learning implemented, e.g., during the summer, during planning time, on Saturday, during professional learning days?
12. What are you most proud of at your school?
13. Talk about the instructional role your principal plays in your school?
14. Is there anything else you would like to add regarding the success of your school?

Superintendent Interview Protocol:

First congratulations on the success of your school. Thank you for being here today and providing us with more information about the success at your school. Based on criteria developed by the staff of the SC Education Oversight Committee, your school is being considered as a school that is Beating the Odds. This designation means that based on the percentage of Pupils in Poverty at your school, your school is exceeding expectations on the School Report Card. We want to understand in more detail how you do your work, especially when you have felt you have been successful and when you have felt challenged. We may ask more probing questions during the interview based on your responses. There is no wrong answer. Our hope is that others will learn from your school's success, and we hope to tell part of that story. This interview is scheduled for 45-50 minutes. Again, thank you for your participation and providing us with more detail on the successes of (Name of School). If you are ready, we will begin.

Questions to facilitate conversation:

1. How long have you been superintendent of this district (including this current year)? What was your position prior to this superintendency? If another district, what district?
2. In your opinion, what are the most important things that contribute to your school's success? Are these same things going on at the other elementary schools in your district? What do you think the difference is?
3. What resources does the district provide this school?? Are any of these resources different than what is provided to other elementary schools in the district?
4. What professional learning has been provided to this school by the district in the last three years? Is this professional learning provided to all elementary schools in the district? Does this school engage in additional professional learning for teachers? If so, what are they? How is professional learning implemented in this school, e.g., during the summer, professional learning days, Saturdays, etc.
5. How does this school use data to improve student performance? Does the district provide assistance on how to use the data? How is this achieved?
6. What attributes that lead to student success are exhibited by the current principal, i.e., what does the principal do that you think contributes to the school's success? (Also ask if about former principal if applicable)
7. What are your expectations for student performance at elementary schools in your district? How do you develop those expectations? How do you hold principals accountable for student performance?
8. How are the budgets for your schools developed? How much participation and influence do principals have on their school's budget and expenditures?
9. What challenges have you faced as superintendent? What actions have you taken to overcome these challenges?
10. What is the relationship between the Board of Education and the school district? Is the Board supportive of proposals, actions, or other initiatives proposed by the district?
11. What are you most proud of at this school?
12. Is there anything else you would like to speak to about this school that we did not ask?

Parent Interview Protocol:

Thank you for being here today and providing us with more information about the success at _____. This school is partner school in the Beating the Odds Investigative Study, which means based on the poverty rating, this school is exceeding the anticipated report card rating. We want to understand in more detail how you do your work to support the success at (Name of School). We may ask additional questions during the interview based on your responses for clarity or additional information. There is no wrong answer. Our goal is to understand your teaching process and the experience of Beating the Odds, so please feel free to be open and candid throughout our conversation. This interview is scheduled for 45-50 minutes. Again, congratulations on the success of this school and thank you for your participation and providing us with more detail (Name of School)). If you are ready, we will begin.

Questions to facilitate conversation:

1. How do you feel this school is doing when it comes to educating children?
2. In your opinion, what are the most important things that contribute to *this feeling (good, bad etc)*?
3. Do you think this happens everywhere? In other schools in the district? What do you think the difference is?
4. Are there any groups at the school you serve on (e.g. SIC, PTO), What made you/why/how did you join?
5. If Yes, what are the priorities of this group? How did you determine them? How does the group work with the principal? Teachers?
6. What is the feeling you get when you walk into _____? How would you describe the culture of (name of school)? b. Can you give examples of when this can be seen?
7. What challenges have you faced at (Name of School)? What actions have you/the parent groups taken? What supports have you had? What do you wish you had?
8. Do you see the principal use data to improve student academic performance? Teachers? How?
8b. What data about the school does the principal share with you? (e.g. students achievement, discipline data etc?)
9. Does the school engage with the community? How? Does the community engage with the school? How? (If no) What inhibits the school and the community supporting each other?
10. What is the relationship between the teachers and the principal? How can you tell?
11. What are you most proud of at (Name of School)?
12. What else should we know about Name of School that we did not ask?

Teacher Interview Protocol:

Thank you for being here today and providing us with more information about the success at (Name of School). This school is being considered a school that is Beating the Odds which means based on the poverty rating, this school is exceeding the anticipated report card rating. We want to understand in more detail is how you do your work to support the success at (Name of School). We may ask additional questions during the interview based on your responses for clarity or additional information. There is no wrong answer. Our goal is to understand your teaching process and the experience of Beating the Odds, so please feel free to be open and candid throughout our conversation. This interview is scheduled for 45-50 minutes. Again, congratulations on the success of this school and thank you for your participation and providing us with more detail (Name of School)). If you are ready, we will begin.

Questions to facilitate conversation:

1. What are your priorities in the classroom as you go about your day? How do you ensure you meet these priorities?
2. In your opinion, what are the most important things that contribute to *Name of School* success? Are these same things going on at the other elementary schools in your district? What do you think the difference is?
3. How would you describe the culture of (name of school)?
 - 3b. Can you give examples of when this can be seen?
4. What professional learning has been provided to this you by the district in the last three years? How helpful was it?/Do you recommend it to other schools/teachers? What other topics you wish would be covered? How is professional learning implemented in this school, e.g., during the summer, professional learning days, Saturdays, etc.
5. How does this school use data to improve student performance? How are you supported to use student data to improve performance?
6. What attributes that lead to student success are exhibited by the current principal, i.e., what does the principal do that you think contributes to the school's success? (Also ask if about former principal if applicable)
 - 6b. What teacher attributes do you think you share and lead to student success? How does the principal and/or district encourage and support this?
7. What are your expectations for student performance in your classroom? How do you develop those expectations? How do you hold students accountable for student performance?
 - 7b. What are your principal's expectations for student performance? How are you held accountable to meet them?
8. How do you work with grade level teams? How do you work with subject teams?
 - 8b. Ask about any bonding activities, scheduling for meetings, RTI/MTSS meetings and communication strategies with colleagues.
 - 8c. How do you communicate with families and students?
 - 8d. Do you feel empowered to work together to improve teaching and learning? What elements/things make you feel that way?
9. What challenges have you faced as a teacher at (*Name of School*)? What actions have you taken to overcome these challenges? What supports have you had? What do you wish you had?
10. What is the relationship between the teachers and the principal? What is the relationship between the teachers and the other building instructional leaders? What is the relationship between teachers and the district?
11. What are you most proud of at (*Name of School*)?
12. Is there anything else you would like to speak to about *Name of School* that we did not ask?

Community Member Interview Protocol:

Thank you for being here today and providing us with more information about the success at (Name of School). This school is a partner school in the “Beating the Odds Investigative Study” which means based on the percentage of pupils in poverty served here. This school is exceeding the anticipated report card rating. We want to understand in more detail how you do your work to support the success at (Name of School). We may ask additional questions during the interview based on your responses for clarity or additional information. There is no wrong answer. Our goal is to understand your experiences, so please feel free to be open and candid throughout our conversation. This interview is scheduled for 45-50 minutes. Again, congratulations on the success of this school and thank you for your participation and providing us with more detail. If you are ready, we will begin.

Questions to facilitate conversation:

1. In your opinion, what are the most important things that contribute to this school’s success? Are these same things going on at the other elementary schools in your district to your knowledge? What do you think the difference is?
2. What are the priorities of the SIC? How did you determine them?
 - 2b. Did you use any resources to determine your priorities or process for working together? (state SIC supports, people, trainings etc.)
3. How does the SIC work with the principal and Teachers?
4. How would you describe the culture of (name of school)?
 - 4b. Can you give examples of when this can be seen?
5. What challenges have you faced at (*Name of School*)? What actions have you/the SIC taken to overcome these challenges? What supports have you had? What do you wish you had?
6. As a member of the SIC, how do you see the principal and teachers use data to improve student academic performance?
 - 6b. What data about the school does the principal share with you? (*ie suspensions rates, attendance rates, interim benchmark data throughout the year, end of year schools (how much detail), ie, disaggregated, by grade level*)
7. How does the school and the community engage with/support each other? How has this occurred? What inhibits the school and the community supporting each other?
8. What is the relationship between the teachers and the principal? What is the relationship between the teachers and the other building instructional leaders? What is the relationship between teachers and the district?
9. What are you most proud of at (*Name of School*)?
10. What else should we know about *Name of School* that we did not ask?

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2025-26 Appropriation Act: Education Improvement Act (EIA) Recurring

EIA Program Name	FY 2024-25 Appropriation	EOC Recommendations December 2024 Increase/Decrease	Executive Budget	House	Senate	Ratified	Notes
Education Economic and Development Act	\$8,413,832						
State Aid to Classrooms	\$738,826,434	\$20,000,000	\$20,000,000	\$32,000,000	\$32,000,000	\$32,000,000	\$80 million in recurring general funds also appropriated – Total increase of \$112 million
Industry Certifications/Credentials	\$3,000,000						
Adult Education	\$17,073,736						
Arts Curricular Grants	\$1,487,571						
Career and Technology Education	\$29,572,135	\$13,000,000					
Computer Science Certification and Professional Learning	\$3,000,000						
Instructional Support for Districts (iHub/LMS/AMS)	\$3,794,751						

EIA Program Name	FY 2024-25 Appropriation	EOC Recommendations December 2024 Increase/Decrease	Executive Budget	House	Senate	Ratified	Notes
Summer Reading Camps	\$7,500,000	\$30,571,200	\$19,317,625	\$5,432,617	\$7,051,375	\$7,051,375	Nonrecurring EIA funds of \$23,519,825 also appropriated – Total of \$30,571,200
Reading Coaches	\$9,922,556						
Assessment/Testing	\$27,561,400						
Instructional Materials	\$29,856,586	\$20,000,000			\$3,257,655	\$3,257,655	Nonrecurring EIA funds of \$29,614,175 and nonrecurring general funds of \$41,585,026 – Total of \$74,456,856
Math Resources & Support	\$11,500,000						Includes Palmetto Math Project
Reading	\$3,271,026						
EAA Technical Assistance	\$23,801,301						
Power School/ Data Collection	\$7,500,000						
School Value Added Instrument	\$1,400,000						
EIA Allocation: 4 yr old Early Childhood	\$8,513,846						
CDEPP - SCDE	\$78,465,168						

EIA Program Name	FY 2024-25 Appropriation	EOC Recommendations December 2024 Increase/Decrease	Executive Budget	House	Senate	Ratified	Notes
Early Literacy Training	\$2,975,000						
Intensive Developmental Education & Therapy	\$3,300,000				-\$1,300,000		Funding for Pattison's Academy for Comprehensive Education and Meyer Center; reduction for Palmetto Excel Public Charter
Teacher of the Year Award	\$155,000						
Teacher Quality Commission	\$372,724						
Teacher Supplies	\$20,455,350						
National Board Certification	\$34,500,000						
Rural Teacher Recruitment	\$9,748,392	-\$1,400,00	-\$1,400,000	-\$1,400,000	-\$1,400,000	-\$1,400,00	This reduction is for SCSU Bridge Program
TeachSC	\$727,650						
ADEPT	\$873,909						
Professional Development	\$2,771,758						
Technology	\$12,271,826						
Family Connection SC	\$600,000						

EIA Program Name	FY 2024-25 Appropriation	EOC Recommendations December 2024 Increase/Decrease	Executive Budget	House	Senate	Ratified	Notes
SDE Grants Committee	\$9,004,313						
Charter School Leadership Program		\$272,750	\$272,750	\$272,750	\$272,750	\$272,750	
School Leadership Accelerator		\$6,725,000		\$6,725,000	\$6,725,000	\$6,725,000	
Literacy & Distance Learning	\$415,000						
Reach Out & Read	\$1,000,000	\$250,000	\$250,000	\$250,000		\$250,000	
Youth Challenge Academy	\$1,000,000						
Arts Education (SC Arts Commission)	\$1,170,000						
Education Oversight Committee	\$2,187,264						
South Carolina Autism Society (Per Proviso)	\$500,000						
Science P.L.U.S.	\$563,406	\$16,594	\$356,500	\$356,000	\$356,500	\$356,500	
STEM Centers SC	\$2,000,000	-\$1,000,000					
Teach For America SC	\$2,000,000	-\$1,000,000					
SC Council on Economic Education	\$300,000	\$150,000	\$150,000				

EIA Program Name	FY 2024-25 Appropriation	EOC Recommendations December 2024 Increase/Decrease	Executive Budget	House	Senate	Ratified	Notes
Center for Educational Partnerships Agency (H270)	\$715,933						
Centers for Excellence Agency CHE (H030)	\$1,137,526						
Center of Excellence to Prepare Teachers of Children of Poverty - Francis Marion (Per Proviso)	\$350,000						
South Carolina Program for Recruitment & Retention of Minority Teachers (Per Proviso)	\$339,482						
Teacher Loan Program	\$5,089,881						
Babynet Autism Therapy	\$3,926,408	\$1,570,563					
Call Me MiSTER	\$500,000	\$1,400,000	\$1,400,000	\$695,000	\$500,000	\$695,000	
Regional Education Centers	\$1,952,000		\$23,913	\$23,913		\$23,913	

EIA Program Name	FY 2024-25 Appropriation	EOC Recommendations December 2024 Increase/Decrease	Executive Budget	House	Senate	Ratified	Notes
CERRA Agency (H470)	\$2,231,680						
The Continuum	\$2,500,000						
Carolina Collaborative for Alternative Preparation (USC CAP)	\$1,950,000						
Education Data Dashboards	\$3,605,978						
Jobs for America's Graduates (JAG-SC)	\$3,000,000						
SC TEACHER	\$2,000,000						
Save the Children	\$1,000,000						
Project HYPE	\$950,000						
Project Read	\$100,000						
TransformSC	\$400,000						
First Steps to School Readiness	\$47,267,334		\$2,969,228	\$1,969,228	\$1,969,228	\$1,969,228	Note an additional \$1 million comes from General Funds for CERDEP

EIA Program Name	FY 2024-25 Appropriation	EOC Recommendations December 2024 Increase/Decrease	Executive Budget	House	Senate	Ratified	Notes
Palmetto Partners (Per Proviso)	\$125,000						
Teacher Pay – State Agencies		\$2,169,984	\$2,169,984	\$1,084,992	\$1,084,992	\$1,084,992	
Department of Juvenile Justice	\$2,736,500			\$97,500	\$97,500	\$97,500	
Dept. of Corrections	\$303,750		\$152,000	\$76,000	\$76,000	\$76,000	
New: SC FFA Property Maintenance and Renovation					\$50,000	\$50,000	
TOTAL INCREASE:		\$92,726,091	\$45,662,000	\$47,583,000	\$50,741,000	\$52,509,913	

2025-26 Appropriation Act: Education Improvement Act (EIA) Non-recurring

EIA Program Name	EOC Recommendations December 2024 Increase/Decrease	Executive Budget	House	Senate	Ratified
SCDE - Child Nutrition Program		\$1,600,000	\$1,600,000	\$1,600,000	\$1,600,000
Tech-to-Teach Pilot Program (H590)		\$1,500,000	\$1,500,000		\$1,500,000
SCDE - School Safety Grants		\$20,000,000	\$20,000,000	\$20,000,000	\$20,000,000
SCDE- School Buses		\$35,000,000	\$35,000,000	\$30,000,000	\$35,000,000
Teacher Strategic Classroom		\$5,000,000	\$5,000,000	\$5,000,000	\$5,000,000
Agriculture in the Classroom		\$750,000	\$750,000	\$750,000	\$750,000
SCDE - Instructional Materials		\$23,150,000	\$18,114,175	\$29,614,175	\$29,614,175
SCDE – Summer Reading Camps			\$23,519,825	\$23,519,825	\$23,519,825
Imagination Library	\$6,000,000		\$6,000,000		\$6,000,000
Teaching Transformation Pilot (USC)				\$1,000,000	\$1,000,000
TOTAL:	\$6,000,000	\$87,000,000	\$111,484,000	\$111,484,000	\$123,984,000

EDUCATION OVERSIGHT COMMITTEE

July 1, 2025 through June 30, 2026

Tentative Meeting Schedule

Subcommittees	Full Committee
	August 10-11, 2025
September 15, 2025	
	October 13, 2025
November 3, 2025*	
November 17, 2025	
December 1, 2025*	
	December 8, 2025
January 12, 2026	
	February 9, 2026
March 16, 2026	
	April 13, 2026
May 18, 2026	
	June 8, 2026

* The EIA and Improvement Mechanisms Subcommittee will tentatively meet in November and December, if needed, for EIA budget hearings and reviews.

FYI



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The Leader's Guide to Corporate Culture

How to manage the eight critical elements of organizational life

→ by BORIS GROYSBERG, JEREMIAH LEE, JESSE PRICE, and J. YO-JUD CHENG

STRATEGY AND CULTURE are among the primary levers at top leaders' disposal in their never-ending quest to maintain organizational viability and effectiveness. Strategy offers a formal logic for the company's goals and orients people around them. Culture expresses goals through values and beliefs and guides activity through shared assumptions and group norms.

Strategy provides clarity and focus for collective action and decision-making. It relies on plans and sets of choices to mobilize people and can often be enforced by both concrete rewards for achieving goals and consequences for failing to do so. Ideally, it also incorporates adaptive elements that can scan and analyze the external environment and sense when changes are required to maintain continuity and growth.







Leadership goes hand-in-hand with strategy formation, and most leaders understand the fundamentals. Culture, however, is a more elusive lever, because much of it is anchored in unspoken behaviors, mindsets, and social patterns.

For better *and* worse, culture and leadership are inextricably linked. Founders and influential leaders often set new cultures in motion and imprint values and assumptions that persist for decades. Over time an organization's leaders can also shape culture, through both conscious and unconscious actions (sometimes with unintended consequences). The best leaders we have observed are fully aware of the multiple cultures within which they are embedded, can sense when change is required, and can deftly influence the process.

Unfortunately, in our experience it is far more common for leaders seeking to build high-performing organizations to be confounded by culture. Indeed, many either let it go unmanaged or relegate it to the HR function, where it becomes a secondary concern for the business. They may lay out detailed, thoughtful plans for strategy and execution, but because they don't understand culture's power and dynamics, their plans go off the rails. As someone once said, culture eats strategy for breakfast.

It doesn't have to be that way. Our work suggests that culture can, in fact, be managed. The first and most important step leaders can take to maximize its value and minimize its risks is to become fully aware of how it works. By integrating findings from more than 100 of the most commonly used social and behavioral models, we have identified

eight styles that distinguish a culture and can be measured. (We gratefully acknowledge the rich history of cultural studies—going all the way back to the earliest explorations of human nature—on which our work builds.) Using this framework, leaders can model the impact of culture on their business and assess its alignment with strategy. We also suggest how culture can help them achieve change and build organizations that thrive in even the most trying times.

Defining Culture

Culture is the tacit social order of an organization: It shapes attitudes and behaviors in wide-ranging and durable ways. Cultural norms define what is encouraged, discouraged, accepted, or rejected within a group. When properly aligned with personal values, drives, and needs, culture can unleash tremendous amounts of energy toward a shared purpose and foster an organization's capacity to thrive.

Culture can also evolve flexibly and autonomously in response to changing opportunities and demands. Whereas strategy is typically determined by the C-suite, culture can fluidly blend the intentions of top leaders with the knowledge and experiences of frontline employees.

The academic literature on the subject is vast. Our review of it revealed many formal definitions of organizational culture and a variety of models and methods for assessing it. Numerous processes exist for creating and changing it. Agreement on specifics is sparse across these definitions, models, and methods, but through a synthesis of

seminal work by Edgar Schein, Shalom Schwartz, Geert Hofstede, and other leading scholars, we have identified four generally accepted attributes:

Shared. Culture is a group phenomenon. It cannot exist solely within a single person, nor is it simply the average of individual characteristics. It resides in shared behaviors, values, and assumptions and is most commonly experienced through the norms and expectations of a group—that is, the unwritten rules.

Pervasive. Culture permeates multiple levels and applies very broadly in an organization; sometimes it is even conflated with the organization itself. It is manifest in collective behaviors, physical environments, group rituals, visible symbols, stories, and legends. Other aspects of culture are unseen, such as mindsets, motivations, unspoken assumptions, and what David Rooke and William Torbert refer to as “action logics” (mental models of how to interpret and respond to the world around you).

Enduring. Culture can direct the thoughts and actions of group members over the long term. It develops through critical events in the collective life and learning of a group. Its endurance is explained in part by the attraction-selection-attrition model first introduced by Benjamin Schneider: People are drawn to organizations with characteristics similar to their own; organizations are more likely to select individuals who seem to “fit in”; and over time those who don't fit in tend to leave. Thus culture becomes a self-reinforcing social pattern that grows increasingly resistant to change and outside influences.

■ Leaders seeking to build high-performing organizations are often confounded by culture. As someone once said, culture eats strategy for breakfast.

Implicit. An important and often overlooked aspect of culture is that despite its subliminal nature, people are effectively hardwired to recognize and respond to it instinctively. It acts as a kind of silent language. Shalom Schwartz and E.O. Wilson have shown through their research how evolutionary processes shaped human capacity; because the ability to sense and respond to culture is universal, certain themes should be expected to recur across the many models, definitions, and studies in the field. That is exactly what we have discovered in our research over the past few decades.

Eight Distinct Culture Styles

Our review of the literature for commonalities and central concepts revealed two primary dimensions that apply regardless of organization type, size, industry, or geography: people interactions and response to change. Understanding a company's culture requires determining where it falls along these two dimensions.

People interactions. An organization's orientation toward people interactions and coordination will fall on a spectrum from highly independent to highly interdependent. Cultures that lean toward the former place greater value on autonomy, individual action, and competition. Those that lean toward the latter emphasize integration, managing relationships, and coordinating group effort. People in such cultures tend to collaborate and to see success through the lens of the group.

Response to change. Whereas some cultures emphasize stability—

prioritizing consistency, predictability, and maintenance of the status quo—others emphasize flexibility, adaptability, and receptiveness to change. Those that favor stability tend to follow rules, use control structures such as seniority-based staffing, reinforce hierarchy, and strive for efficiency. Those that favor flexibility tend to prioritize innovation, openness, diversity, and a longer-term orientation. (Kim Cameron, Robert Quinn, and Robert Ernest are among the researchers who employ similar dimensions in their culture frameworks.)

By applying this fundamental insight about the dimensions of people interactions and response to change, we have identified eight styles that apply to both organizational cultures and individual leaders. Researchers at Spencer Stuart (including two of this article's authors) have interdependently studied and refined this list of styles across both levels over the past two decades.

Caring focuses on relationships and mutual trust. Work environments are warm, collaborative, and welcoming places where people help and support one another. Employees are united by loyalty; leaders emphasize sincerity, teamwork, and positive relationships.

Purpose is exemplified by idealism and altruism. Work environments are tolerant, compassionate places where people try to do good for the long-term future of the world. Employees are united by a focus on sustainability and global communities; leaders emphasize shared ideals and contributing to a greater cause.

Learning is characterized by exploration, expansiveness, and creativity.



Idea in Brief

THE PROBLEM

Much of corporate culture is rooted in unspoken behaviors, mindsets, and social patterns. Confounded by this, many leaders either ignore culture or relegate it to HR, where it becomes a secondary concern for the business. This is a missed opportunity.

THE GUIDE

The authors present eight culture styles—*caring, purpose, learning, enjoyment, results, authority, safety, and order*—that fit into an “integrated culture framework” based on how each style reflects a company's orientation toward people interactions and response to change. Using four tools, leaders can determine their company's current culture, find step-by-step advice for shaping their culture, determine which cultural characteristics employees converge on, and assess their company's context, conditions, and culture.

ALIGNMENT

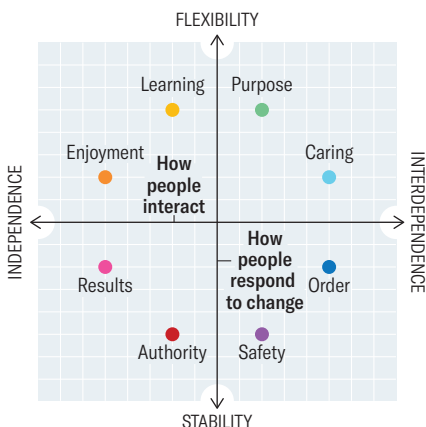
Determining your organization's current culture and shaping it to fit your strategy is the first step toward corporate success. Properly managed, culture can help leaders achieve change and build organizations that will thrive even in trying times.

■ Culture can fluidly blend the intentions of top leaders with the knowledge and experiences of frontline employees.

Integrated Culture: The Framework

On the basis of decades of experience analyzing organizations, executives, and employees, we developed a rigorous, comprehensive model to identify the key attributes of both group culture and individual leadership styles. Eight characteristics emerge when we map cultures along two dimensions: how people interact (independence to interdependence) and their response to change (flexibility to stability). The relative salience of these eight styles differs across organizations, though nearly all are strongly characterized by *results* and *caring*.

The spatial relationships are important. Proximate styles, such as *safety* and *order*, or *learning* and *enjoyment*, will coexist more easily than styles that are far apart on the chart, such as *authority* and *purpose*, or *safety* and *learning*. Achieving a culture of *authority* often means gaining the advantages (and living with the disadvantages) of that culture but missing out on the advantages (and avoiding the disadvantages) of a culture of *purpose*.



Work environments are inventive and open-minded places where people spark new ideas and explore alternatives. Employees are united by curiosity; leaders emphasize innovation, knowledge, and adventure.

Enjoyment is expressed through fun and excitement. Work environments are lighthearted places where people tend to do what makes them happy. Employees are united by playfulness and stimulation; leaders emphasize spontaneity and a sense of humor.

Results is characterized by achievement and winning. Work environments are outcome-oriented and merit-based places where people aspire to achieve top performance. Employees are united by a drive for capability and success; leaders emphasize goal accomplishment.

Authority is defined by strength, decisiveness, and boldness. Work environments are competitive places where people strive to gain personal advantage. Employees are united by strong control; leaders emphasize confidence and dominance.

Safety is defined by planning, caution, and preparedness. Work environments are predictable places where people are risk-conscious and think things through carefully. Employees are united by a desire to feel protected and anticipate change; leaders emphasize being realistic and planning ahead.

Order is focused on respect, structure, and shared norms. Work environments are methodical places where people tend to play by the rules and want to fit in. Employees are united by cooperation; leaders emphasize shared procedures and time-honored customs.

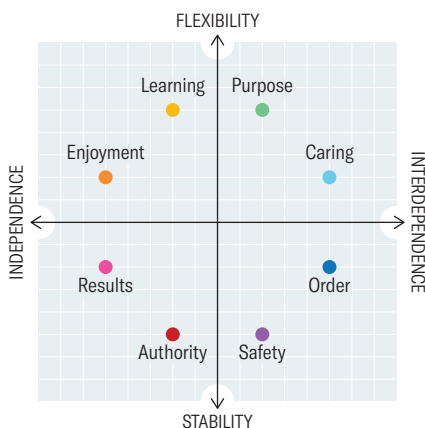
These eight styles fit into our integrated culture framework (see the exhibit “Integrated Culture: The Framework”) according to the degree to which they reflect independence or interdependence (people interactions) and flexibility or stability (response to change). Styles that are adjacent in the framework, such as *safety* and *order*, frequently coexist within organizations and their people. In contrast, styles that are located across from each other, such as *safety* and *learning*, are less likely to be found together and require more organizational energy to maintain simultaneously. Each style has advantages and disadvantages, and no style is inherently better than another. An organizational culture can be defined by the absolute and relative strengths of each of the eight and by the degree of employee agreement about which styles characterize the organization. A powerful feature of this framework, which differentiates it from other models, is that it can also be used to define individuals’ styles and the values of leaders and employees.

Inherent in the framework are fundamental trade-offs. Although each style can be beneficial, natural constraints and competing demands force difficult choices about which values to emphasize and how people are expected to behave. It is common to find organizations with cultures that emphasize both *results* and *caring*, but this combination can be confusing to employees. Are they expected to optimize individual goals and strive for outcomes at all costs, or should they work as a team and emphasize collaboration and shared success? The nature of the work itself, the



Integrated Culture: Leader Statements

Top leaders and founders often express cultural sentiments within the public domain, either intentionally or unintentionally. Such statements can provide important clues to how these leaders are thinking about and leading their organizations' cultures.



● Purpose: Whole Foods

"Most of the greatest companies in the world also have great purposes....Having a deeper, more transcendent purpose is highly energizing for all of the various interdependent stakeholders."
—John Mackey, founder and CEO

● Caring: Disney

"It is incredibly important to be open and accessible and treat people fairly and look them in the eye and tell them what is on your mind."
—Bob Iger, CEO

● Order: SEC

"Rule making is a key function of the commission. And when we are setting the rules for the securities markets, there are many rules we, the SEC, must follow."
—Jay Clayton, chairman

● Safety: Lloyd's of London

"To protect themselves, businesses should spend time understanding what specific threats they may be exposed to and speak to experts who can help."
—Inga Beale, CEO

● Authority: Huawei

"We have a 'wolf' spirit in our company. In the battle with lions, wolves have terrifying abilities. With a strong desire to win and no fear of losing, they stick to the goal firmly, making the lions exhausted in every possible way."
—Ren Zhengfei, CEO

● Results: GSK

"I've tried to keep us focused on a very clear strategy of modernizing ourselves."
—Sir Andrew Witty, former CEO

● Enjoyment: Zappos

"Have fun. The game is a lot more enjoyable when you're trying to do more than make money."
—Tony Hsieh, CEO

● Learning: Tesla

"I'm interested in things that change the world or that affect the future and wondrous new technology where you see it and you're like 'Wow, how did that even happen?'"
—Elon Musk, cofounder and CEO

business strategy, or the design of the organization may make it difficult for employees to be equally *results* focused and *caring*.

In contrast, a culture that emphasizes *caring* and *order* encourages a work environment in which teamwork, trust, and respect are paramount. The two styles are mutually reinforcing, which can be beneficial but can also present challenges. The benefits are strong loyalty, retention of talent, lack of conflict, and high levels of engagement. The challenges are a tendency toward group-think, reliance on consensus-based decisions, avoidance of difficult issues, and a calcified sense of "us versus them."

Leaders who are more focused on *results* and *learning* may find the combination of *caring* and *order* stifling when they seek to drive entrepreneurship and change. Savvy leaders make use of existing cultural strengths and have a nuanced understanding of how to initiate change. They might rely on the participative nature of a culture focused on *caring* and *order* to engage team members and simultaneously identify a *learning*-oriented "insider" who has the trust of his or her peers to advocate for change through relationship networks.

The eight styles can be used to diagnose and describe highly complex and diverse behavioral patterns in a culture

and to model how likely an individual leader is to align with and shape that culture. Using this framework and multilevel approach, managers can:

- Understand their organization's culture and assess its intended and unintended effects
- Evaluate the level of consistency in employees' views of the culture
- Identify subcultures that may account for higher or lower group performance
- Pinpoint differences between legacy cultures during mergers and acquisitions
- Rapidly orient new executives to the culture they are joining and help them determine the most effective way to lead employees



The Pros and Cons of Culture Styles

Every culture style has strengths and weaknesses. The chart below summarizes the advantages and disadvantages of each style and how frequently it appears as a defining culture characteristic among the companies in our study.

● Purpose:

Purpose-driven, idealistic, tolerant

ADVANTAGES: Improved appreciation for diversity, sustainability, and social responsibility

DISADVANTAGES: Overemphasis on a long-term purpose and ideals may get in the way of practical and immediate concerns

RANKED
1ST OR
2ND
9%



● Caring:

Warm, sincere, relational

ADVANTAGES: Improved teamwork, engagement, communication, trust, and sense of belonging

DISADVANTAGES: Overemphasis on consensus building may reduce exploration of options, stifle competitiveness, and slow decision-making

63



● Order:

Rule-abiding, respectful, cooperative

ADVANTAGES: Improved operational efficiency, reduced conflict, and greater civic-mindedness

DISADVANTAGES: Overemphasis on rules and traditions may reduce individualism, stifle creativity, and limit organizational agility

15



● Safety:

Realistic, careful, prepared

ADVANTAGES: Improved risk management, stability, and business continuity

DISADVANTAGES: Overemphasis on standardization and formalization may lead to bureaucracy, inflexibility, and dehumanization of the work environment

8



● Authority:

Bold, decisive, dominant

ADVANTAGES: Improved speed of decision-making and responsiveness to threats or crises

DISADVANTAGES: Overemphasis on strong authority and bold decision-making may lead to politics, conflict, and a psychologically unsafe work environment

4



● Results:

Achievement-driven, goal-focused

ADVANTAGES: Improved execution, external focus, capability building, and goal achievement

DISADVANTAGES: Overemphasis on achieving results may lead to communication and collaboration breakdowns and higher levels of stress and anxiety

89



● Enjoyment:

Playful, instinctive, fun-loving

ADVANTAGES: Improved employee morale, engagement, and creativity

DISADVANTAGES: Overemphasis on autonomy and engagement may lead to a lack of discipline and create possible compliance or governance issues

2



● Learning:

Open, inventive, exploring

ADVANTAGES: Improved innovation, agility, and organizational learning

DISADVANTAGES: Overemphasis on exploration may lead to a lack of focus and an inability to exploit existing advantages

7



Note: Sum of percentages is greater than 100 because styles were counted as dominant if they were ranked 1 or 2 overall.

- Measure the degree of alignment between individual leadership styles and organizational culture to determine what impact a leader might have

- Design an aspirational culture and communicate the changes necessary to achieve it

The Link Between Culture and Outcomes

Our research and practical experience have shown that when you are evaluating how culture affects outcomes, the context in which the organization operates—geographic region, industry, strategy, leadership, and company structure—matters, as does the strength of the culture. (See “Context, Conditions, and Culture,” page 23.) What worked in the past may no longer work in the future, and what worked for one company may not work for another.

We have arrived at the following insights:

When aligned with strategy and leadership, a strong culture drives positive organizational outcomes.

Consider the case of a best-in-class retailer headquartered in the United States. The company had viewed its first priority as providing top-notch customer service. It accomplished this with a simple rule—Do right by the customer—that encouraged employees to use their judgment when providing service. A core HR training practice was to help every salesperson see customer interactions as an opportunity to create “service stories that become legendary.” Employees were reminded to define service from the customer’s perspective, to constantly engage customers with

■ Savvy leaders make use of existing cultural strengths and have a nuanced understanding of how to initiate change.

questions geared toward understanding their specific needs and preferences, and to go beyond their expectations.

In measuring the culture of this company, we found that like many other large retailers, it was characterized primarily by a combination of *results* and *caring*. Unlike many other retailers, however, it had a culture that was also very flexible, *learning* oriented, and focused on *purpose*. As one top executive explained, “We have freedom as long as we take good care of the customer.”

Furthermore, the company’s values and norms were very clear to everyone and consistently shared throughout the organization. As the retailer expanded into new segments and geographies over the years, the leadership strove to maintain an intense customer focus without diluting its cherished culture. Although the company had historically focused on developing leaders from within—who were natural culture carriers—recruiting outsiders became necessary as it grew. The company preserved its culture through this change by carefully assessing new leaders and designing an onboarding process that reinforced core values and norms.

Culture is a powerful differentiator for this company because it is strongly aligned with strategy and leadership. Delivering outstanding customer service requires a culture and a mindset that emphasize achievement, impeccable service, and problem-solving through autonomy and inventiveness. Not surprisingly, those qualities have led to a variety of positive outcomes for the company, including robust growth and international expansion, numerous customer service awards, and frequent

appearances on lists of the best companies to work for.

Selecting or developing leaders for the future requires a forward-looking strategy and culture. The chief executive of an agriculture business was planning to retire, spurring rumors about a hostile takeover. The CEO was actively grooming a successor, an insider who had been with the company for more than 20 years. Our analysis revealed an organizational culture that strongly emphasized *caring* and *purpose*. As one leader reflected, “You feel like part of a large family when you become an employee at this company.”

The potential successor understood the culture but was far more risk-averse (*safety*) and respectful of traditions (*order*) than the rest of the company. Given the takeover rumors, top leaders and managers told the CEO that they believed the company needed to take a more aggressive and action-oriented stance in the future. The board decided to consider the internal candidate alongside people from outside the company.

Three external candidates emerged: one who was aligned with the current culture (*purpose*), one who would be a risk-taker and innovative (*learning*), and one who was hard-driving and competitive (*authority*). After considerable deliberation, the board chose the highly competitive leader with the *authority* style. Soon afterward an activist investor attempted a hostile takeover, and the new CEO was able to navigate through the precarious situation, keep the company independent, and simultaneously begin to restructure in preparation for growth.

In a merger, designing a new culture on the basis of complementary strengths can speed up integration and create more value over time.

Mergers and acquisitions can either create or destroy value. Numerous studies have shown that cultural dynamics represent one of the greatest yet most frequently overlooked determinants of integration success and postmerger performance.

For example, senior leaders from two merging international food retailers had invested heavily in their organizations’ cultures and wanted to preserve their unique strengths and distinct heritages. An assessment of the cultures revealed shared values and areas of compatibility that could provide a foundation for the combined culture, along with important differences for which leaders would have to plan: Both companies emphasized *results*, *caring*, and *order* and valued high-quality food, good service, treating employees fairly, and maintaining a local mindset. But one operated in a more top-down manner and scored much higher on *authority*, especially in the behavior of leaders.

Because both companies valued teamwork and investments in the local community, the leaders prioritized *caring* and *purpose*. At the same time, their strategy required that they shift from top-down *authority* to a *learning* style that would encourage innovation in new-store formats and online retailing. As one senior leader said of the strategic aspiration, “We need to dare to do things differently, not play by the old rule books.”

Once they had agreed on a culture, a rigorous assessment process identified



leaders at both organizations whose personal style and values would allow them to serve as bridges to and champions for it. Then a program was launched to promote cultural alignment within 30 top teams, with an emphasis on clarifying priorities, making authentic connections, and developing team norms that would bring the new culture to life.

Finally, structural elements of the new organization were redesigned with culture in mind. A model for leadership was developed that encompassed recruitment, talent assessment, training and development, performance management, reward systems, and promotions. Such design considerations are often overlooked during organizational change, but if systems and structures don't align with cultural and leadership imperatives, progress can be derailed.

In a dynamic, uncertain environment, in which organizations must be more agile, *learning* gains importance. It's not surprising that *results* is the most common culture style among all the companies we have studied. Yet during a decade of helping leaders design aspirational cultures, we have seen a clear trend toward prioritizing *learning* to promote innovation and agility as businesses respond to increasingly less predictable and more complex environments. And although *learning* ranks fourth within our broader database, small companies (200 employees or fewer) and those in newer industries (such as software, technology, and wireless equipment) accord it higher values.

Consider one Silicon Valley-based technology company we worked with. Though it had built a strong business

and invested in unique technology and top engineering talent, its revenue growth was starting to decline as newer, nimbler competitors made strides in a field exploding with innovation and business model disruption. Company leaders viewed the culture as a differentiator for the business and decided to diagnose, strengthen, and evolve it. We found a culture that was intensely *results* focused, team based (*caring*), and exploratory (a combination of *enjoyment* and *learning*).

After examining the overall business strategy and gaining input from employees, leaders aimed for a culture that was even more focused on *learning* and adopted our framework as a new language for the organization in its daily work. They initiated conversations between managers and employees about how to emphasize innovation and exploration. Although it takes time to change a culture, we found that the company had made notable progress just one year later. And even as it prepared for an impending sale amid ever greater competition and consolidation, employee engagement scores were on the rise.

A strong culture can be a significant liability when it is misaligned with strategy. We studied a Europe-based industrial services organization whose industry began to experience rapid and unprecedented changes in customer expectations, regulatory demands, and competitive dynamics. The company's strategy, which had historically emphasized cost leadership, needed to shift toward greater service differentiation in response. But its strong culture presented a roadblock to success.

We diagnosed the culture as highly *results* oriented, *caring*, and *order* seeking, with a top-down emphasis on *authority*. The company's leaders decided to shape it to be much more *purpose*-driven, enabling, open, and team based, which would entail an increase in *caring* along with *learning* and *purpose* and a decrease in *authority* and *results*.

This shift was particularly challenging because the current culture had served the organization well for many years, while the industry emphasized efficiency and *results*. Most managers still viewed it as a strength and fought to preserve it, threatening success for the new strategic direction.

Cultural change is daunting for any organization, but as this company realized, it's not impossible. The CEO introduced new leadership development and team coaching programs and training opportunities that would help leaders feel more comfortable with cultural evolution. When people departed, the company carefully selected new leaders who would provide supporting values, such as *caring*, and increased the emphasis on a shared *purpose*. The benefits of this strategic and cultural shift took the form of an increasingly diverse array of integrated service offerings and strong growth, particularly in emerging markets.

Four Levers for Evolving a Culture

Unlike developing and executing a business plan, changing a company's culture is inextricable from the emotional and social dynamics of people in the

■ Cultural dynamics represent one of the greatest yet most frequently overlooked factors in postmerger performance.

organization. We have found that four practices in particular lead to successful culture change:

Articulate the aspiration. Much like defining a new strategy, creating a new culture should begin with an analysis of the current one, using a framework that can be openly discussed throughout the organization. Leaders must understand what outcomes the culture produces and how it does or doesn't align with current and anticipated market and business conditions. For example, if the company's primary culture styles are *results* and *authority* but it exists in a rapidly changing industry, shifting toward *learning* or *enjoyment* (while maintaining a focus on *results*) may be appropriate.

An aspirational culture suggests the high-level principles that guide organizational initiatives, as at the technology company that sought to boost agility and flexibility amid increasing competition. Change might be framed in terms of real and present business challenges and opportunities as well as aspirations and trends. Because of culture's somewhat ambiguous and hidden nature, referring to tangible problems, such as market pressures or the challenges of growth, helps people better understand and connect to the need for change.

Select and develop leaders who align with the target culture. Leaders serve as important catalysts for change by encouraging it at all levels and creating a safe climate and what Edgar Schein calls "practice fields." Candidates for recruitment should be evaluated on their alignment with the target. A single model that can assess both organizational culture and individ-

ual leadership styles is critical for this activity.

Incumbent leaders who are unresponsive of desired change can be engaged and re-energized through training and education about the important relationship between culture and strategic direction. Often they will support the change after they understand its relevance, its anticipated benefits, and the impact that they personally can have on moving the organization toward the aspiration. However, culture change can and does lead to turnover: Some people move on because they feel they are no longer a good fit for the organization, and others are asked to leave if they jeopardize needed evolution.

Use organizational conversations about culture to underscore the importance of change. To shift the shared norms, beliefs, and implicit understandings within an organization, colleagues can talk one another through the change. Our integrated culture framework can be used to discuss current and desired culture styles and also differences in how senior leaders operate. As employees start to recognize that their leaders are talking about new business outcomes—innovation instead of quarterly earnings, for example—they will begin to behave differently themselves, creating a positive feedback loop.

Various kinds of organizational conversations, such as road shows, listening tours, and structured group discussion, can support change. Social media platforms encourage conversations between senior managers and frontline employees. Influential change champions can advocate for a cul-

ture shift through their language and actions. The technology company made a meaningful change in its culture and employee engagement by creating a structured framework for dialogue and cultivating widespread discussion.

Reinforce the desired change through organizational design. When a company's structures, systems, and processes are aligned and support the aspirational culture and strategy, instigating new culture styles and behaviors will become far easier. For example, performance management can be used to encourage employees to embody aspirational cultural attributes. Training practices can reinforce the target culture as the organization grows and adds new people. The degree of centralization and the number of hierarchical levels in the organizational structure can be adjusted to reinforce behaviors inherent to the aspirational culture. Leading scholars such as Henry Mintzberg have shown how organizational structure and other design features can have a profound impact over time on how people think and behave within an organization.

Putting It All Together

All four levers came together at a traditional manufacturer that was trying to become a full solutions provider. The change started with reformulating the strategy and was reinforced by a major brand campaign. But the president understood that the company's culture represented the biggest barrier to change and that the top leaders were the greatest lever for evolving the culture.

The culture was characterized by a drive for *results* followed by *caring*

■ ■ Leading with culture may be among the few sources of sustainable competitive advantage left to companies today.

About the Research

We undertook a comprehensive study of organizational culture and outcomes to explore the link between them. We analyzed the cultures of more than 230 companies along with the leadership styles and values of more than 1,300 executives across a range of industries (including consumer discretionary, consumer staples, energy and utilities, financial and professional services, healthcare, industrials, and IT and telecommunications), regions (Africa, Asia, Europe, the Middle East, North America, Oceania, and South America), and organizational types (public, private, and nonprofit). We diagnosed those cultures using online survey responses from approximately 25,000 employees together with interviews of company managers.

Our analysis highlighted how strongly each of the

eight styles defined the organizations in our study. *Results* ranked first, and *caring* second. This pattern is consistent across company types, company sizes, regions, and industries. *Order* and *learning* ranked among the third and fourth most common styles in many cultures.

Culture appears to most directly affect employee engagement and motivation, followed by customer orientation. To model its relationship to organizational outcomes, we assessed employee engagement levels for all the companies using widely accepted survey questions and arrived at customer-orientation scores with an online questionnaire. In many cases we also documented top leaders' individual styles and values.

We found that employee engagement is most strongly related to greater flexibility,

in the form of *enjoyment*, *learning*, *purpose*, and *caring*. Similarly, we observed a positive relationship between customer orientation and those four styles plus *results*. These relationships, too, are surprisingly consistent across companies. We also found that engagement and customer orientation are stronger when employees are in close agreement about the culture's characteristics.

Our research was influenced by the work of countless scholars in this field, many of whom are mentioned in this article. In addition, we stand on the shoulders of giants such as David Caldwell, Jennifer Chatman, James Heskett, John Kotter, Charles O'Reilly, and many, many others who have inspired our thinking.

strong business-line leaders, freeing up time to become a better advocate for the culture and to focus more on customers.

The top team then invited a group of 100 middle managers into the conversation through a series of biannual leadership conferences. The first one established a platform for input, feedback, and the co-creation of an organizational change plan with clear cultural priorities. The president organized these managers into teams focused on critical business challenges. Each team was required to go outside the company to source ideas, to develop solutions, and to present its findings to the group for feedback. This initiative placed middle managers in change roles that would traditionally have been filled by vice presidents, giving them greater autonomy in fostering a *learning*-based culture. The intent was to create real benefits for the business while evolving the culture.

The president also initiated a program to identify employees who had positive disruptive ideas and working styles. These people were put on project teams that addressed key innovation priorities. The teams immediately began improving business results, both in core commercial metrics and in culture and engagement. After only one year employee engagement scores jumped a full 10 points, and customer Net Promoter Scores reached an all-time high—providing strong client references for the company's new and innovative solutions.

IT IS POSSIBLE—in fact, vital—to improve organizational performance through culture change, using the sim-

and *purpose*, the last of which was unusually strong for the industry. One employee described the company as “a talented and committed group of people focused on doing good for the planet, with genuine desire, support, and encouragement to make a difference in the community.” Whereas the broader culture was highly collaborative, with flat decision-making, leaders were seen as top-down, hierarchical,

and sometimes political, which discouraged risk-taking.

The top leaders reviewed their culture's strengths and the gaps in their own styles and discussed what was needed to achieve their strategic aspirations. They agreed that they needed more risk-taking and autonomy and less hierarchy and centralized decision-making. The president restructured the leadership team around



ple but powerful models and methods in this article. First leaders must become aware of the culture that operates in their organization. Next they can define an aspirational target culture. Finally they can master the core change practices of articulation of the aspiration, leadership alignment, organizational conversation, and organizational design. Leading with culture may be among the few sources of sustainable competitive advantage left to companies today. Successful leaders will stop regarding culture with frustration and instead use it as a fundamental management tool. ☺

HBR Reprint S18010

Spotlight Package Reprint R1801B

Boris Groysberg is the Richard P. Chapman Professor of Business Administration at Harvard Business School and a faculty affiliate at the school's Race, Gender & Equity Initiative, as well as the coauthor, with Colleen Ammerman, of *Glass Half-Broken* (Harvard Business Review Press, 2021). Twitter: @bgroysberg. **Jeremiah Lee** and **Jesse Price** lead a people and organizational analytics unit at Oliver Wyman; formerly at Spencer Stuart, they are cofounders of two culture-related businesses. **J. Yo-Jud Cheng** is an assistant professor of business administration at the University of Virginia's Darden School of Business.

What's Your Organization's Cultural Profile?

BEFORE YOU BEGIN an initiative to shape your organization's culture, it's important to explore where it is today. This worksheet and the questions that follow can help you formulate a preliminary assessment of your culture and get the conversation started.

Consider how your organization currently operates, what is valued, how people behave, and what unifies them. Partner with a colleague and independently rate each statement according to how well it describes your organization.

Add the two ratings in each row and then rank the eight styles. The higher the total, the stronger the match.

Compare your rankings with your colleague's and discuss the following questions:

What do you like most about the current culture?

What behaviors and mindsets might you evolve?

How effective are your organization's leaders at role modeling the culture?

What are the characteristics of people who are most successful in your culture?

When new people don't succeed in your culture, what is the most common reason? ☺

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On a scale of 1–5, rate how well each of these statements describes your organization.

1 NOT AT ALL WELL	2 NOT VERY WELL	3 SOMEWHAT WELL	4 VERY WELL	5 EXTREMELY WELL						
The organization is focused on:		The organization feels like:		TOTAL						
Collaboration and mutual trust		A big family			CARING					
1	2	3	4	5	1	2	3	4	5	
Compassion and tolerance		An idealistic community or cause			PURPOSE					
1	2	3	4	5	1	2	3	4	5	
Exploration and creativity		A dynamic project			LEARNING					
1	2	3	4	5	1	2	3	4	5	
Fun and excitement		A celebration			ENJOYMENT					
1	2	3	4	5	1	2	3	4	5	
Achievement and winning		A meritocracy			RESULTS					
1	2	3	4	5	1	2	3	4	5	
Strength and boldness		A competitive arena			AUTHORITY					
1	2	3	4	5	1	2	3	4	5	
Planning and caution		A meticulously planned operation			SAFETY					
1	2	3	4	5	1	2	3	4	5	
Structure and stability		A smoothly running machine			ORDER					
1	2	3	4	5	1	2	3	4	5	



How to Shape Your Culture

FIRST YOU MUST identify culture targets. The best ones have some attributes in common: They align with the company's strategic direction; they're important to execute; and they reflect the demands of the external business environment. A good target should be both specific and achievable. For example, "We value our customers" can create ambiguity and lead to inconsistent choices regarding hiring, developing leaders, and running the company. A better version might be "We build genuine and positive relationships with customers; we serve our customers with humility; and we act as ambassadors for our rich brand heritage."

To Set a Culture Target

Understand the current culture.

Examine your culture—the company's founding and heritage, its espoused values, subcultures, leadership style, and team dynamics. (Use the worksheet on the preceding page to start the conversation.)

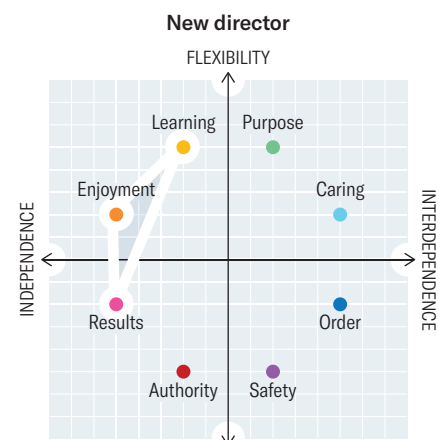
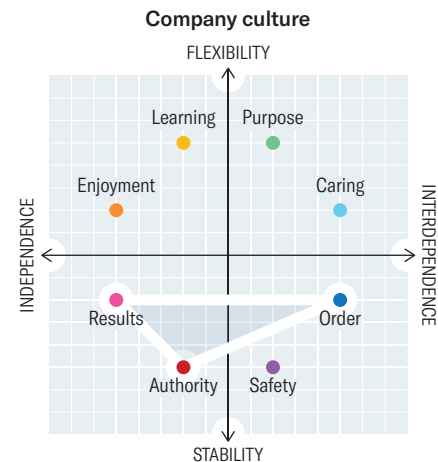
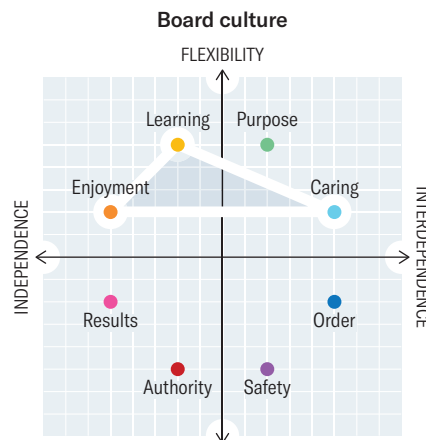
Identify your culture's strengths and examine its impact on your organization today. Interview key stakeholders and influential members of the organization as needed.

Consider strategy and the environment. Assess current and future ex-

One Company's Experience

One large company used its search for a new director as an opportunity to bridge a problematic gap between the company's culture and the board's culture. To accomplish this, the leadership first diagnosed the two cultures along with its aspirations for the new director.

Whereas the company was highly *results* oriented and focused on *order*, discipline, and execution, the board was far more *learning* oriented, exploratory, inquisitive, and focused on *enjoyment*. A director who was *results*-driven and curious would help bridge the two cultures. Two years after an individual with the desired style was brought in, the board and the management team reported more-effective strategic planning activities and improved company performance.



ternal conditions and strategic choices and determine which cultural styles will need to be strengthened or diminished in response.

Formulate a culture target according to which styles will support future changes.

Frame the aspiration in business realities. Translate the target into orga-

nizational change priorities. It should be framed not as a culture change initiative but in terms of real-world problems to be solved and solutions that create value.

Focus on *leadership alignment*, *organizational conversations*, and *organizational design* as the levers to guide the culture's evolution. ☺

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Convergence Matters

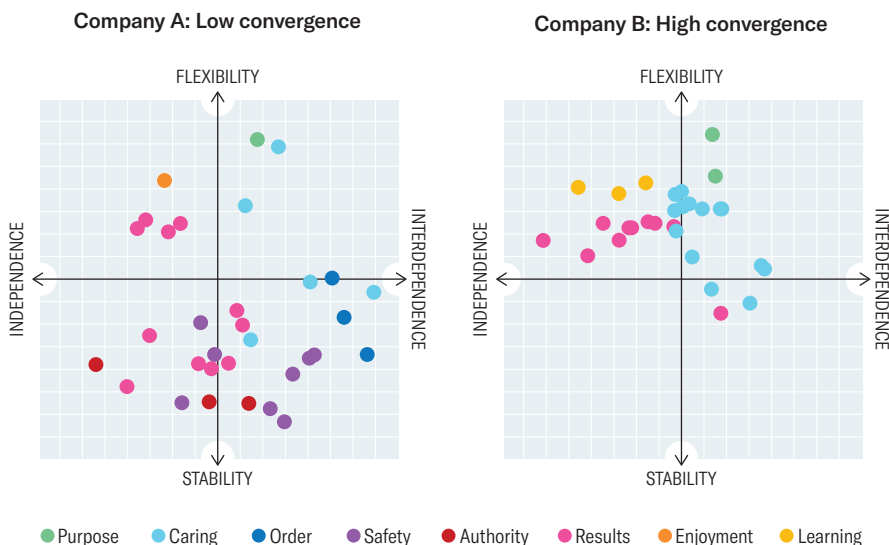
WHEN WE COMPARED employees' views on their organization's most salient cultural attributes, two types of organizations emerged: *low convergence* (employees rarely agreed on the most important cultural attributes) and *high convergence* (views were more closely aligned). In the two examples below, each dot represents one employee.

Note that in the low-convergence organization, seven of the eight cultural attributes were cited as most important, and every quadrant is represented.

That means employees viewed their company in varying and often opposite ways. Some saw a *caring* organization, for example, while others saw one that emphasized *authority*.

Why is high convergence important? Because it correlates with levels of employee engagement and customer orientation. However, if the culture you have is not the one you want, high convergence will make it harder to change. ☹

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Context, Conditions, and Culture

CONTEXT MATTERS WHEN assessing a culture's strategic effectiveness.

Leaders must simultaneously consider culture styles and key organizational and market conditions if they want their culture to help drive performance. Region and industry are among the most germane external factors to keep in mind; critical internal considerations include alignment with strategy, leadership, and organizational design.

Region. The values of the national and regional cultures in which a company is embedded can influence patterns of behavior within the organization. (This linkage has been explored in depth by Geert Hofstede and the authors of the GLOBE study.) We find, for example, that companies operating in countries characterized by a high degree of institutional collectivism (defined as valuing equity within groups and encouraging the collective distribution of resources), such as France and Brazil, have cultures that emphasize *order* and *safety*. Companies operating in countries with low levels of uncertainty avoidance (that is, they are open to ambiguity and future uncertainty), such as the United States and Australia, place a greater emphasis on *learning*, *purpose*, and *enjoyment*. Such external influences are important considerations when working across borders or designing an appropriate organizational culture.

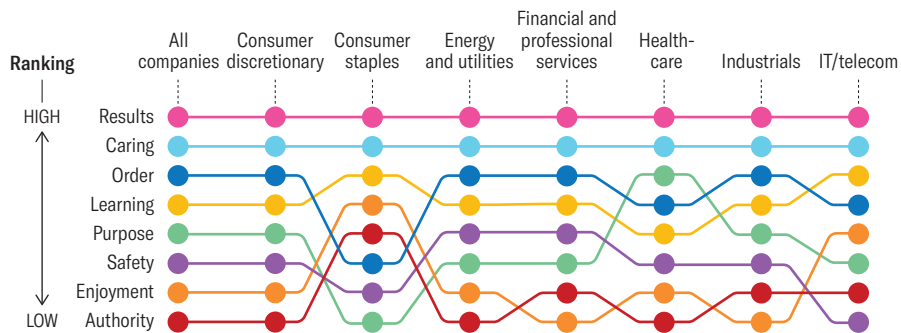
Industry. Varying cultural attributes may be needed to address industry-specific regulations and customer needs. A comparison of organizations



BUILD YOUR CORPORATE CULTURE

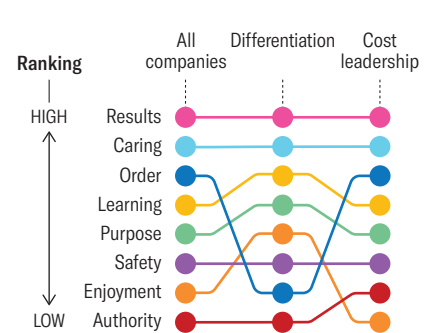
THE LEADER'S GUIDE TO CORPORATE CULTURE

Culture styles ranked by industry



Source: Based on an assessment of 230+ companies (industry) and a subsample of 25 companies (strategy)

Culture styles ranked by strategy



across industries reveals evidence that cultures might adapt to meet the demands of industry environments.

Organizational cultures in financial services are more likely to emphasize *safety*. Given the increasingly complex regulations enacted in response to the financial crisis, careful work and risk management are more critical than ever in this industry. In contrast, nonprofits are far more purpose-driven, which can reinforce their commitment to a mission by aligning employee behavior around a common goal.

Strategy. For its full benefit to be realized, a culture must support the strategic goals and plans of the business. For example, we find differences between companies that adopt a differentiation strategy and companies that pursue a cost leadership strategy. Although *results* and *caring* are key cultural characteristics at both types of companies, *enjoyment*, *learning*, and *purpose* are more suited to differentiation, whereas *order* and *authority* are

more suited to cost leadership. Flexible cultures—which emphasize *enjoyment* and *learning*—can spur product innovation in companies aiming to differentiate themselves, whereas stable and predictable cultures, which emphasize *order* and *authority*, can help maintain operational efficiency to keep costs low.

Strategic considerations related to a company's life cycle are also linked to organizational culture. Companies with a strategy that seeks to stabilize or maintain their market position prioritize *learning*, whereas organizations operating with a turnaround strategy tend to prioritize *order* and *safety* in their efforts to redirect or reorganize unprofitable units.

Leadership. It is hard to overestimate the importance of aligning culture and leadership. The character and behaviors of a CEO and top executives can have a profound effect on culture. Conversely, culture serves to either constrain or enhance the performance of leaders. Our own data from executive recruiting

activities shows that a lack of cultural fit is responsible for up to 68% of new-hire failures at the senior leadership level. For individual leaders, cultural fit is as important as capabilities and experience.

Organizational design. We see a two-way relationship between a company's culture and its particular structure. In many cases, structure and systems follow culture. For example, companies that prioritize teamwork and collaboration might design incentive systems that include shared team and company goals along with rewards that recognize collective effort. However, a long-standing organizational design choice can lead to the formation of a culture. Because the latter is far more difficult to alter, we suggest that structural changes should be aligned with the desired culture. ☺

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