21st Century People Power:
Building a Movement for Educational Equity in Massachusetts

Doctor of Education Leadership (Ed.L.D.)
Capstone

Submitted by
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To the Harvard Graduate School of Education
in partial fulfillment of the requirements for the degree of
Doctor of Education Leadership

April 3, 2020
Dedicatoria

Dedico esta tesis a la primera doctora de la familia, mi ejemplo a seguir, el amor de mi vida, mi abuela materna Alsacia Diprés.

Tu fortaleza, sabiduría, y dedicación a los demás inspiraron mi camino como educadora y abogada de los derechos humanos.

Gracias por tu luz, gracias por tu entrega, y gracias por brindarme siempre tu amor y apoyo incondicional. Me enorgullece seguir tu legado.

Esta labor te la dedico a ti.
Acknowledgements

**Mami:** tú has estado a mi lado cada paso de esta jornada. Gracias por esas caminatas largas para que yo pueda asistir a Steppingstone, por creer en mi cuando fui la primera en dejar la casa para ir a Yale, y por siempre hecharme porras cuando siento que no puedo más. Mis sueños son realidad porque tú creiste en ellos primero.

**Mis papis Julio y Elvis,** por tantas conversaciones sobre la política y como ayudar a que el mundo sea mejor lugar para todos. Esas pláticas formaron el fundamento de esta tesis.

**Mi familia hermosa:** desde Boston, Connecticut, Nueva York, y Florida hasta Santo Domingo, ustedes saben que son mi todo. Son el mejor equipo (y el más alegre!). En ningún momento de esta trayectoria me he sentido sola porque siempre sé que puedo contar con ustedes. Este logro nos pertenece a todos.

**Arlene & Bangie,** a special thank you to you for being my cheerleaders from Day 1!

To **my capstone committee,** **Monica Higgins, Karen Mapp, and Natasha Ushomirsky:** You three have been the most exceptional teachers these last three years. I have gotten to work with you, learn from you, and grow so much as a result. This last year was not easy but your support and partnership made all the difference. Thank you.

To **Natasha and Tripp:** I thank the universe every day for our wonderful team. Thank you for welcoming me with such open arms to MEEP. I deeply value your mentorship and our ability to get work done while having fun. Can’t wait for what’s next!

To **my colleagues at Ed Trust & The Massachusetts Education Equity Partnership:** Working with you this past year has made me a better advocate and leader. Thank you for the gift of serving my community in the way I always dreamt.

To **my students from Room 302:** being Ms. Novas with you taught me to be my best me. Los adoro. #goodbetterbest. And of course, **Ms. Donley:** you started this journey with me and our work together with our babies inspires me to this day.

To **Marcela Maldonado, Profe Stephen Pitti, Grace Coleman, and Josh Biber:** You helped shape me as a scholar, a teacher, and a leader. Your influence has been a great one in my life. When I decided to apply to EdLD in 2017, you were the first people I contacted. Thanks for your belief in me then and always.

To **Mike & Hope Pascucci:** Your early belief in my potential floored me. Thank you for your friendship and encouragement to pursue this leadership journey.

To **Loris Toribio & Cap Aguilar:** You two have been true ride-or-dies throughout this entire process and beyond. Thank you for always having my back, for encouraging me to keep going at every turn, and for the beautiful sistership you bless me with.
To Mayra Macías, Salvador Andrade, and Sebastián Pérez: It’s hard to imagine myself here without each of you & the bonds we have shared since 2006. Thank you for being nerds with me from jump and for your unfailing support, especially when the going got rough. You are my kindred souls and I love you.

To my EdLD family, it is an honor to be counted among you. To my peer mentor Paola Peacock, Shirley Vargas, and Crystal Palmero Ward, you have no idea how meaningful the “You got this!” messages were. I treasure your friendship so much.

To CGr8: There are no better 24 humans than all of you. Thank you for seeing me for real for real, for challenging me to be and do my best, for endless laughter despite the hardest work, and for being my co-conspirators in this fight for educational equity.

To the Avant Guard: Sincerely thankful that the EdLD gods gave me you as my Year 1 family. You are my rock.

To Kofi: I knew the moment we met on Interview Day that you would be someone important in my life, and that has proven to be true every day since. Your friendship is a gift. Thank you for every car ride, all the real talk, the kitchen check-ins, and reminders of our Black Excellence.

To Dia & Stefan: You are my sister. You are my brother. I truly believe you will change the world. Thank you for ALL the love, all the texts, and all the amazing growth we’ve experienced together.

To Elvis: Your spirit lives on every page of this capstone. Thank you for the blessing of being your big sister.

I love you all.
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Abstract

The Education Trust is a national policy and advocacy nonprofit dedicated to closing opportunity gaps and expanding achievement for historically underserved students, particularly children of color and children living in poverty. After 2015, Ed Trust launched a strategy to support state advocates in forming equity coalitions. The Massachusetts Education Equity Partnership (MEEP), founded in Fall 2018, was one of the state equity coalitions born out of this strategy and was where I completed residency.

This capstone examines how advocacy and movement-building in the education sector can serve as an antidote to the widespread anxiety and hurt currently impacting the United States. I joined Ed Trust and MEEP in July 2019 and was charged with managing MEEP’s membership and coalition dynamics, creating systems that ensured internal equity and facilitated advocacy, and reimagining MEEP’s vision and strategic plan to meet its goal of securing educational equity in Massachusetts. My work in the field drew from social movement theory, community organizing, and literature about teaming.

In putting research to practice, my residency revealed that in order to spark a statewide movement for educational equity in a state that has not experienced one in the modern era, education advocates must (1) learn to organize and mobilize communities, (2) practice effective teaming and organizational ambidexterity, (3) orchestrate small wins that lead to larger ones, and (4) capture and be responsive to the national zeitgeist.

These learnings compel The Education Trust to revisit its state strategy and how it supports state equity coalitions to truly form a national movement, and it invites the education sector to reimagine family and community engagement and reassess how the sector responds to successes and perceived failures. In turn, we realize that building people power is the balm we can leverage to fight societal and educational injustice.
“... I held an atlas in my lap
ran my fingers across the whole world
and whispered
where does it hurt?

it answered
everywhere
everywhere
everywhere
everywhere.”

excerpt from warsan shire’s *what they did yesterday afternoon*

“Democracy in America has never been a spectator sport.”

hahrie han, *how organizations develop activists*
Introduction

Today, the United States finds itself in a moment of deep hurt. Political divisiveness is rampant, and Americans find themselves suspicious of each other and hesitant to join hands across lines of difference. The deep hurt has also resulted in unprecedented movement building, evidenced by organizations like Black Lives Matter, March for Our Lives, and #MeToo. Paradoxically, tremendous coalitions have been born alongside deep societal fissures. It is within this national context that I joined The Education Trust as a resident in the summer of 2019, charged with supporting a statewide education advocacy coalition in my home state of Massachusetts.

Founded in 1996, The Education Trust is a national nonprofit that works to close opportunity gaps that disproportionately affect students of color, students who are economically disadvantaged, students with disabilities, and English learners. Through expert policy research and advocacy, Ed Trust supports efforts that expand excellence and equity in education from preschool through college, increase college access and completion for historically underserved students, engage diverse communities dedicated to education equity, and increase political and public will to act on equity issues (The Education Trust FY20 Strategic Plan). Revised during last year’s strategic planning process, the organization’s theory of change is rooted in four key actions:

(1) Listen: maintain vigilant awareness of and listen to policy proposals, parent and family coalitions, legislators, educators, advocates, and students to better understand relevant contexts and inform advocacy;

1 I will occasionally abbreviate The Education Trust as “Ed Trust” and will use both interchangeably.
(2) Research: assess and provide expert quantitative and qualitative data that reveal evidence-based best practices and strategies that further equity;

(3) Engage: forge relationships with policymakers, practitioners, and advocates to form diverse coalitions and increase political and public will; and

(4) Secure: achieve meaningful changes in policy and practice. (The Education Trust FY20 Strategic Plan).

The Education Trust is organized into divisions of expertise: P-12 Policy & Practice, Higher Education Policy & Practice, Partnerships & Engagement, Communications, and Operations. These divisions house their own research teams and produce resources that are national in scope and also specific to individual states and communities.

In 2015, following the passage of the Every Student Succeeds Act (ESSA), more discretion and decision-making power over education policy was returned to the states. Noting the opportunity presented by this legislation, Ed Trust’s leadership expanded the organization’s focus beyond just national policy in order to include work with state advocates who would impact ground-level change. The strategy of partnering with states deepened after Donald Trump was elected president in 2016, as collaboration with a Betsy DeVos Education Department became more challenging for Ed Trust given the lack of values alignment between it and the administration.

Resultantly, the organization’s current strategic focus is to support statewide equity coalitions championed by diverse groups of local advocates who aim to change policies, practices, and narratives that result in greater equity and justice for historically underserved students. Now supporting advocacy in 12 states, Ed Trust partners with these
coalitions and acts as a backbone organization and technical service provider, adding much-needed capacity for partner advocates on the ground.

Following months of strategic planning in 2019, the leadership of The Education Trust shared a vision with staff that underscored a renewed commitment to movement-building, a shift that naturally emerged after three years of enacting the state strategy. The goal reads, “At The Education Trust, we work to build a national movement to expand educational excellence, equity, and opportunity for students of color and students from low-income backgrounds,” (The Education Trust FY20 Strategic Plan). And so, this begs the question, “What does a movement for educational equity look like given the current national political context?” This is the query that I brought with me in July of 2019 when I commenced my work with the Massachusetts Education Equity Partnership.

The Massachusetts Education Equity Partnership: Background

In the Fall of 2018, the Massachusetts Education Equity Partnership (MEEP) was born out of Ed Trust’s aforementioned strategy to support state-level equity coalitions. Individuals from the national team with ties to Massachusetts, including the President and CEO John B. King, Jr., were approached by a small group of local leaders who were interested in this sort of advocacy. This contingent of early supporters conducted data walks together and discussed the policy areas that most concerned them and their organization and coalesced around the value of education equity.

But there was one major challenge: the prevailing thought in Massachusetts was and is that the state is #1 in education. As a result, many power brokers believed that Massachusetts public schools were doing ‘just fine’. The group, convened and led by Ed Trust, published a report that directly challenged this narrative called #1 For Some:
Opportunity & Achievement in Massachusetts (The Education Trust, 2018, #1 For Some: Opportunity & Achievement in Massachusetts, retrieved from https://number1forsome.org/). #1 For Some placed a spotlight directly on the deep inequities that exist in the Commonwealth for students of color, low-income students, English learners, and students with disabilities. The report quickly gained traction and was even referenced in a gubernatorial debate between Massachusetts Governor Charlie Baker and Jay Gonzalez shortly after its release (Charlie Baker & Jay Gonzalez Debate, November 1, 2018). Following the publication, the group sought to maintain momentum and decided to name itself the Massachusetts Education Equity Partnership, with the intention of continuously shining a light on educational disparities in the state.

Today, MEEP represents close to 30 social justice, civil rights, and education organizations from across Massachusetts that collaborate to advocate for educational equity and justice for historically underserved students through sustained collective action. The goals of the partnership are three-fold:

- To achieve changes in policy and practice that improve opportunities and outcomes for students of color, students who are economically disadvantaged, students with disabilities, English learners, and other underserved students;
- To compel statewide stakeholders – including lawmakers, education leaders, advocates, and the general public – to recognize that Massachusetts’ education system is “#1 for Some,” not “#1 for All” and to build public will to act; and,
- To take action as a coordinated, powerful, and authentic voice for educational equity in the state.
Even more, MEEP seeks to transform education advocacy in Massachusetts by disrupting traditional silos and bringing together diverse organizations – many that have never sat together at the same table – under a common goal and shared value in order to spark an unprecedented movement for educational equity in Massachusetts.

Although the partnership steadily gained notoriety, MEEP still confronted a challenging landscape in Massachusetts, known for its provinciality and culture of silo, often even suspicion, across organizations. MEEP needed to ensure that the work did not stop with #1 for Some. Seeking to replace the culture of silo and suspicion with one of inclusion and collaboration, MEEP worked to elevate and act in solidarity with communities that had historically been left out of policy decisions and institutions of power in Massachusetts.

It is important to note that education advocacy coalitions like MEEP – with its unique mix of attributes – have been rare in Massachusetts in the last 30 years. Stakeholders I spoke with throughout residency echoed the sentiment of one of the architects of the 1993 Massachusetts Education Reform Act (MERA), also currently a consultant for MEEP, who told me in no uncertain terms that “there hasn’t been a movement for educational equity in Massachusetts [in the modern era],” (MEEP consultant, personal communication, July 9, 2019). While there have been moments of great change, there has not been a movement. Movements are different from temporary coalitions for change in critical ways; this distinction is paramount to understanding the conditions that need to be met to undo the historical disenfranchisement of underserved students and communities.
This capstone

In the pages that follow, I will examine aspects of my personal leadership journey as an education advocate, as well as explore what is required to create a state-level movement for educational equity that is inclusive, democratic, and collaborative, and that can inform The Education Trust’s vision of national movement-building. My project will rest on literature about social movement theory, community organizing, and teaming. I will detail what happened as a result of my efforts as a resident with Ed Trust and MEEP and will offer various forms of evidence – interviews, survey results, and other qualitative data and communications – that inform the implications that this project could have on my own leadership, The Education Trust’s aspirations to engender a national movement, and the education sector as a whole as it seeks to address long-standing gaps and inequities along lines of race and class.

Review of Knowledge for Action

How can effective organizing and teaming help build a movement for educational equity – in Massachusetts and across the country – given the political context of each? As a resident, I was charged with creating structures and operating procedures that would foster healthy collaboration, inclusivity, and democratic engagement within MEEP. The Education Trust’s focus on movement-building informed the ultimate aim of my work, which was to spark unprecedented and coordinated mobilization around educational equity on behalf of the Commonwealth’s most underserved students.

I sought to understand how advocates could effectively organize and collaborate to drive change and create a movement. In this review of knowledge for action, I will:
1. Offer context about social movement theory and the role that progressive social movements have played in education organizing in Massachusetts in the last 30 years,
2. Examine the function and success of contemporary activist civic associations, and
3. Apprehend what teaming for innovation looks like when groups are navigating uncertain conditions, as MEEP currently is.

Together, these sources of knowledge informed my theory of action and helped provide a roadmap for the strategic decisions I made throughout residency.

Social movement theory and social movements for educational equity

As shared in the Introduction, the Massachusetts Education Equity Partnership is a collaborative effort between organizations from across the state that advocate for a range of issues in the context of education, social justice, and civil rights. MEEP convenes leaders of different ages who have a diversity of expertise and who have varied access to positional power within their organizations; it is comprised of executive directors and mid-level analysts, grassroots organizers and education reformers, community-based organizations and large statewide ones. MEEP intentionally sought to be racially, ethnically, and generationally diverse and deliberately recruited homegrown leaders who themselves grew up in underserved Massachusetts communities.

Although movements for educational equity have been rare in Massachusetts’ modern history, many cite the Massachusetts Education Reform Act (MERA) as the last moment that came close, resulting in transformational change for education in the Commonwealth. MERA became the national model for standardization of the K-12
curriculum and set a precedent that continues to inform public education to this day. There is no doubt that the efforts of those involved in the 1993 campaign were extensive and wildly successful. Given his role in that campaign, MEEP’s consultant has shared his belief that their achievement did not meet the threshold to be called a movement (MEEP consultant, personal communication, July 9, 2019). They hosted 200 town meetings, organized task forces, and engaged elected officials and educators for two years, yet he shared that they made some mistakes by not sufficiently including communities of color, teachers, and family advocates in the aftermath of the campaign during the implementation phase. These communities felt left out of key decision-making processes that ultimately impacted them most. Furthermore, the group’s advocacy did not continue once the legislation was achieved; they did not take on additional educational equity challenges together, although they certainly continued to individually advocate and serve Massachusetts in a multitude of other ways.

Social movement theorists would agree with the assessment that 1993’s campaign, while significant for necessary education reform in Massachusetts and the country, did not constitute a movement for educational equity. The literature on this topic shares that social movements “offer a forum for working together to develop community power and to collaborate with others in making fundamental shifts in the political and social arrangements that have caused inequities, exclusions, and subordination,” (Anyon, 2009, p. 194). The ultimate aim of the 1993 effort was not to build community power and create alliances that centered the voices of those on the receiving end of educational inequity and exclusion. There was limited collaboration across lines of power. Civil rights and social activist Jean Anyon shares that “social movements generally try to
transform, rather than work within, the political system.” (Anyon, 2009, p. 196). The MERA group certainly worked within the political system to achieve their wins, and though it transformed instruction, it did not transform existing power structures.

The context above is critical for this review of knowledge for action – it informed my understanding of just how unprecedented MEEP’s efforts would be in this state in particular. In a subsequent meeting, our consultant expressed with exasperation that there is “great complacency around accepting inequity” in Massachusetts today. He added, “Massachusetts has a deep progressive history when it comes to education, but today there is almost an elitism about our progressive history,” which in his opinion fostered that complacency (MEEP consultant, personal communication, December 10, 2019). I understood that the activist muscle would need to be (re)developed in Massachusetts, and knowledge of how to develop that is part of what I seek to uncover through this review.

Progressive coalitions seeking to disrupt traditional power structures, Anyon argues, are most successful when they are cross-sector. Since social movements are not “isolated protest events or short-lived temporary coalitions that form around an issue” (Anyon, 2009, p. 196), they require deliberate group formation that convenes non-traditional partners that share core concerns. This, she claims, is particularly important when it comes to “education organizing”, which “aims to create social capital in communities and to encourage parents and other residents to use their collective strength to force systems change,” (Anyon, 2009, p. 207). This is precisely MEEP’s long-term purpose: to support the empowerment of families and community advocates in transforming institutions of power – schools, school districts, the Department of
Education, and ultimately, the State Legislature – so that educational equity exists at the center of policies and practices for all students in Massachusetts.

Anyon discusses the efforts of the Community Collaborative for District 9 (CC9) in the Bronx, New York in the early 2000’s as an example of a successful cross-sector coalition engaged in education organizing. CC9 was comprised of parents, community-based organizations, a university partner, and the teachers union. Partner organizations included groups like the Northwest Bronx Community Clergy Coalition, which focused on housing, the Institute for Education and Social Policy, which offered research and evaluation expertise, and High Bridge Community Life Center, which provided life training and educational services in the community. This dynamic coalition of advocates worked together for years, ultimately securing $1.6 million for their proposed reforms. This all-hands-on-deck community endeavor leveraged the diversity of expertise of their member organizations and their shared concerns to create a campaign that started with small individual organizational victories that then snowballed into a transformative organizing effort resulting in significant victories for children in the South Bronx.

Anyon draws from decades of social movement theory and makes clear that effective social movements in education – in addition to being cross-sector – do a combination of the following: (1) build on “small wins” through various advocacy actions, (2) provide a sense of community and connectedness, (3) capture the political “zeitgeist”, or spirit of the times, and (4) engage in what Civil Rights Movement activist Ella Baker called “spadework”, or years of prior preparation and activism that provide the foundation for greater advocacy and larger wins (Anyon, 2009, p. 200). Social movement theory, particularly as it relates to education organizing as articulated by Anyon, is
therefore an important frame to reference as I consider how to structure MEEP’s membership and work together as part of my strategic project.

**The role of organizing and mobilizing in contemporary activism**

In *How Organizations Develop Activists*, political scholar Hahrie Han claims that “activists are the threads that hold social and political life together,” (Han, 2014, p. 27) and explains the unique role civic associations have played throughout American history as the safeguards of democracy. Since the nation’s founding, groups of people have come together to have a voice in the political process, forming civic associations that were often large, national, and had dynamic local chapters spread throughout the country that attracted all social classes. However, the advent of direct mail, fractures along lines of race and class in the 1960’s and 1970’s, and the online revolution of the 2000’s completely transformed how people coalesced politically (Han, 2014, p. 19).

Now in the 21st century, activists and advocates find themselves wondering how to activate and mobilize masses of people in the modern era. As Ed Trust seeks to give rise to a national movement where the key players are organizations, not individuals, Han offers a way to think about movement building that integrates a variety of strategies that remain highly useful for a project like mine and that of the organization. She argues that successful high-engagement associations marry mobilizing *and* organizing strategies and are nimble in leveraging diverse tactics to build power, grow membership, and secure policy wins. She shares that “organizers invest in developing the capacities of people to engage with others in activism and become leaders. Mobilizers focus on maximizing the number of people involved without developing their capacity for civic action,” (Han 2014, p. 8). Lone wolves, as the name indicates, act individually and gain personal power
by acquiring information. These distinctions are valuable because they indicate the sorts of actions that an organization might take based on their members’ goals.

**Figure 1: Comparison of Lone Wolf, Mobilizing, and Organizing Models**

(Han, 2014, p. 9)

Figure 1 details the actions that a lone wolf, a mobilizer, or an organizer might take. While mobilizers might want to “choose advocacy strategies that require quick engagement by lots of people” – or small wins, like petitions – so that the ask is as least demanding as possible for members, an organizer would want to forge connectedness by building members’ capacity and sequencing actions as a way to grow engagement with the organization, the mission, and each other. Organizers share interdependent responsibilities and often require additional resources for training and coaching, whereas mobilizers lean on discrete requests that allow individuals to act quickly and alone and do not demand many resources for training.
Han emphasizes that civic associations that orient as organizers “build power by investing in the leadership skills of [their] activists and creating greater collective capacity by increasing the numbers of people responsible for engaging others in action,” (2014, p. 14). The imperative to engage others in organizing places great importance on relationships. By contrast, mobilizers seek to expand their membership base so that they have as much people-power as possible that they can easily marshal. The focus, therefore, is not on relationship and capacity building in mobilizing. Han further emphasizes this point when she references James Q. Wilson’s conception of people’s motivations for joining political organizations. He theorized that people join for reasons that are purposive (to achieve particular policy goals), solidary (social and relational), or material (personal gain) (Wilson, 1973, p. 38).

Mobilizers frequently default to purposive motivation. They target a specific goal and take discrete action in mass force to achieve that outcome. Organizers, on the other hand, attempt to appeal to all three, for it is through solidary motivation that they uncover and support the material aspirations of their members and coalesce around purposive motivation. Organizers create attractive opportunities for participation that further personal, relational, and policy goals. In its infancy, partners² joined MEEP for purposive reasons, as the organization placed little explicit focus on the rest. To become a movement, MEEP would need to leverage all three forms to be effective.

An additional important difference that Han helps illuminate for my project regards the structure of civic associations that organize versus those that mobilize. Since the goal of mobilizing is primarily to reach as many people as possible, “the work of

² In the context of MEEP, the term “partner” refers to individual members not organizations.
mobilizing is usually centralized in the hands of a few leaders,” (Han, 2014, p. 15).

Organizers tend to have more complex arrangements where leadership is distributed across the organization in order to build long-term capacity and motivate others to act through relationships. High-engagement chapters continuously cultivate future activists and leaders through this process, thereby ensuring the growth and sustainability of the organization.

This strategy of distributed organizing leads to greater mobilization capacity as well, but the process does take longer. Organizers distribute responsibility to a network of leaders, who then distribute to another ring of leaders, and so on. Figure 2 highlights the distributed leadership structure in the organizer model, which is informed by Han’s work with Marshall Ganz (Han, 2014, p. 81).

**Figure 2: Distributed Leadership Structure in the Organizer Model (figure designed by Jason English, based on leadership models designed by Marshall Ganz)**

(Mobilizers and lone wolves do not depend on distributed leadership structures like the kind we observe in Figure 2, and so, they can take action more quickly and work)
to achieve their policy goals without cultivating rings of new organizational leaders. The downside is that responsibility is concentrated in the hands of a few, or just one person, and that nothing besides the policy win unites members. These sorts of associations can easily lose momentum and lose membership. Organizers, on the other hand, link “leadership development to the pursuit of their advocacy goals [and thereby] create incentives for themselves to engage in practices that cultivate activism and leadership,” (Han, 2014, p. 79). Core staff is freed up and gains flexibility when its main role is to “organize the organizers” instead of bearing all responsibility for rallying action and participation.

This structure grants strategic autonomy to a wider group of people to achieve the organization’s goals in a distributed manner, although they are all nonetheless bound together through interlocking tiers of training and coaching. The main challenge for organizers is time, for they need to build relationships and develop the leadership capacity of their members at the same time as they move work and advocate for change.

Han argues that, ultimately, “to meet the challenges of building power, civic associations need to go broad in their mobilizing and deep in their organizing,” (Han, 2014, p. 17). She observes that high-engagement organizations today fuse what she terms *transformational organizing* – organizing that deeply invests in developing people’s capacity to act and lead – and *transactional mobilizing* – mobilizing that maximizes the number of participants in an advocacy campaign without needing to develop participants’ capacity for action. The fusion of both approaches could be a winning formula for MEEP in its desire to spark a statewide movement for educational equity over time. By coaching and developing greater numbers of organized activist-leaders who can mobilize en masse...
to achieve advocacy goals, a movement can emerge. Thus, social movements are “both quantity and quality, both numbers and nuance, both transactions and transformations,” (Pastor, Ito, & Rosner, 2011, p. 2). For my strategic project, I identify what the right hybrid of organizing and mobilizing needs to be for MEEP.

Teaming when navigating uncertainty

In Teaming to Innovate (2013), Amy Edmondson focuses on innovation and teaming for the purpose of producing something new given uncertain conditions. As an educational equity coalition committed to building a movement in Massachusetts where, arguably, there has not been one for decades, MEEP is both innovating within the field of education advocacy in the state and also seeking to transform the field altogether. There are a plethora of uncertain conditions that surround our work, from politics to funding to group composition. Edmondson explains teaming similarly to how Han describes organizing: it is “what happens when people collaborate – across boundaries of expertise, hierarchy, or geographic distance – to name a few,” (Edmondson, 2013, p. 1). She provides a concise set of five recommendations that contribute to effective teaming for innovation: aiming high, teaming up, failing well, learning fast, and then repeating the cycle over again.

Aim high. Edmondson sees aiming high as an essential ingredient when engaging smart, motivated people in innovative projects. Organizations that set goals that push people to reach for something greater than themselves do not run out of fuel, for the loftiness of the goal maintains the group’s energy and focus. She gives the example of the teaming that took place in 2010 in Chile when a half million tons of rock collapsed on 33 coal miners, trapping them 2,000 feet below ground. The challenge of extracting that
many people, from so far below the surface, under so much weight, and a host of other precarious conditions brought together a team of over 100 experts from around the world. Their commitment to “an aspirational goal of a successful rescue, despite the brutal odds against their success” led to groundbreaking innovations that resulted in what she terms “a novel solution on the fly,” (Edmondson, 2013, p. 28). For both the miners below and the experts above, setting their sights on a north star that many deemed ultimately impossible resulted in the miners’ survival.

But setting a lofty goal is not enough; people need to believe that their voices matter and will be respected in the process of aiming high. Genuine inquiry invites team members into the work of dreaming big and demonstrates respect for others’ experiences and contributions – and, it can create the “psychological safety” that lets teams successfully navigate inevitable errors and failures (Edmondson, 2013, p. 41). Although cultivating this sort of culture while innovating “might at first seem laborious and slow… engaging people as active thinkers and learners is the only way to innovate [in complex systems] where solutions simply don’t exist at the outset,” (Edmondson, 2013, p. 44). That process takes time and intentionality, but this investment matters when the opportunity is to make a difference.

**Team up.** Teaming up requires knowledge of boundaries between team members and an open mind about what is required to solve a problem. In the context of teaming to innovate, the following boundaries often arise in visible, invisible, and powerful ways: “physical distance (location, time zone), status (perceived social value, hierarchical level, profession, [role]), and knowledge (experience, education),” (Edmondson, 2013, p. 57). Edmondson contends that openly acknowledging boundaries, especially invisible ones,
serves to challenge mindsets (which she calls “taken-for-granted assumptions”) about who knows what and who is most right in a room. Not addressing these differences will hamper teaming across boundaries.

By openly creating bridges across areas of expertise, location, perceived social value, etc., teams are also able to deepen psychological safety. The author admits that the pressure of time can act as a hindrance to this process when managers take a highly structured approach to the work. For this reason, she recommends that “walls between disciplines have to come down and simultaneous work on related tasks must be coordinated and negotiated on a dynamic teaming journey,” (Edmondson, 2013, p. 61). Within MEEP, orchestrating simultaneous workstreams will be an important innovation, and to do so we need clarity about the visible and invisible boundaries already at play.

**Fail well.** Unlearning that failure should be avoided and hidden – or, failing well – is Edmondson’s third recommendation. She distinguishes between preventable, complex, and intelligent failure and argues that “intelligent failures are in fact positive events [because] they’re part of an essential strategy for creating new knowledge, developing ideas, and producing innovation,” (Edmondson, 2013, p. 78-79). When failure happens, it is important to learn the lessons from that failure as quickly as possible rather than engage in shaming or blaming. Honest efforts to experiment or research a possibility should be met with affirmation.

Edmondson coins the term “trial and failure” and urges that constant “experimentation is necessary [for innovation]” (Edmondson, 2013, p. 87) when the answers are indecipherable in advance. She recommends using the practice of running
pilots before committing to a large innovation so as to keep the scale of a failure small and uncover as many potential challenges as possible.

**Learn fast.** For teams to learn fast, Edmondson proposes an important mindset shift that embraces “organizing to learn”. This “way of thinking and acting... is driven by the recognition that the world keeps changing, and that today’s answers are almost certainly not tomorrow’s. It means not having too much (unwarranted) faith in our first round of ideas,” (Edmondson, 2013, p. 97). This sort of learning is disciplined, strategic, and relies on constant iteration. She proposes that teams engage with the following process: *diagnose* the challenge, *design* actions, *take* action, and *reflect* on lessons learned. Diagnosis reveals what is possible given observable constraints; the forethought of designing actions provides focus and clarity; effectively taking action requires tracking results so teams learn as they go; and, reflection is essential for accurate analysis so that experimentation can continue. The practice of high-quality reflection is especially important for MEEP’s advocacy campaigns, given how vital it is for us to measure our impact and ultimate effectiveness given the resources that we invest for each action.

In working to create a new, more equitable future for Massachusetts’ underserved children – a future that does not yet exist –I will need to continuously assess that we are pushing ourselves beyond the status quo. Edmondson’s framework is helpful in that it serves as a guide for MEEP as the partnership teams up for advocacy campaigns. If we heed her five recommendations, it follows that innovative thinking and transformative action will be unleashed. “Setting out to innovate,” after all, “is an act of hope,” (Edmondson, 2013, p. 115).
Anyon, Han, and Edmondson provide a roadmap of action that can serve MEEP as the partnership experiments with different ways to engage in transformational advocacy and spark a movement for educational equity in Massachusetts. By sequencing small wins achieved through diverse cross-sector partnerships, leveraging both mobilizing and organizing strategies, and teaming effectively, MEEP can disrupt traditional power structures and secure justice for students.

**Theory of Action**

Armed with knowledge about social movement theory, civic associations and activism, and teaming for innovation – as well as context about the role of movements for educational equity in Massachusetts’ recent history – the theory of action to support my strategic project with The Education Trust is as follows:

<table>
<thead>
<tr>
<th>If I…</th>
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| • Help build the Massachusetts leadership team’s understanding of what a successful movement for educational equity could look like,  
• Establish organizational practices that combine elements of organizing and mobilizing,  
• Strategically expand MEEP’s group composition so that it empowers historically underserved communities and ground-level advocates, and  
• Create systems that encourage distributed leadership and teaming that facilitate strong connections between diverse partners and greater ownership of MEEP, |

<table>
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<th>Then…</th>
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<tbody>
<tr>
<td>The Massachusetts Education Equity Partnership will be positioned to speak as an authentic &amp; credible voice for educational equity and justice in Massachusetts and thereby achieve meaningful changes in policy and practice for students of color, economically disadvantaged students, English learners, and students with disabilities.</td>
</tr>
</tbody>
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In turn…

This will galvanize historically divided groups from the grassroots, reform, and business communities to launch an unprecedented statewide movement for educational equity.

Description of Strategic Project

My relationship with The Education Trust started in January 2018 when a mutual friend connected me with Ed Trust President and CEO John B. King Jr. While the email seemed random to me at first, I soon learned that Ed Trust was looking to support education advocacy in Massachusetts and wanted to connect with education leaders in the community who could be part of the effort to bring a state equity coalition to life. I was privileged to be part of conversations about what eventually became the Massachusetts Education Equity Partnership since the brainstorm phase.

In September 2018, I met Natasha Ushomirsky – at the time the Director of the P-12 Policy & Practice division at The Education Trust – who, I learned several months later, would become the State Director for Massachusetts’ advocacy work and my supervisor throughout residency. We discussed the roles the two of us would play within the nascent equity coalition: Natasha would bring deep policy expertise and organizational knowledge having worked with Ed Trust for 10 years, and I would offer community organizing and strategic thinking expertise, along with the personal connections and networks that I had built over the years as an educator and life-long Bostonian. Though I had been in communication with Ed Trust long before starting residency, I did not have clarity about my strategic project until the summer of 2019.
The months before my arrival were critical for the fast growth MEEP experienced once I officially joined the team in July. Natasha kicked off the school funding campaign in March 2019 alongside our consultant and together they forged a strong foundation for the partnership, both due to our consultant’s deep experience and extensive connections in Massachusetts’ policy landscape and Natasha’s careful negotiations with partners throughout this crucial first phase of the campaign as a formal coalition.

In my first week, Natasha and I met to discuss my leadership goals and areas of strength, as well as the needs of the partnership. After that conversation, my strategic project was born. As the Senior External Relations Manager for Massachusetts, I was charged with managing the Massachusetts Education Equity Partnership’s membership, evaluating and potentially redesigning the structures that supported MEEP’s operations, enhancing collaboration between partners, and elevating the voices of historically marginalized families and advocates. I joined MEEP in its tenth month of operation and five months after Natasha officially became State Director, yet she, our consultant, and Ed Trust leadership expressed confidence in me from the start and supported my work throughout residency. Surely, this allowed me to get started quickly and, ultimately, to drive change. Given that the coalition was already working together and in the process of forming when I joined the team, I segmented my work into three phases:

- Phase 1 (July – November 2019): Diagnosis and relationship building
- Phase 2 (November 2019 – January 2020): Strategic thinking and pilots
- Phase 3 (February – March 2020): Prioritization and systems design
Phase 1 (July – November 2019): Diagnosis and relationship building

These initial months consisted of diagnosing the state of the partnership, understanding the internal structures of The Education Trust, and building relationships with MEEP partners and Ed Trust colleagues. I intended to “enter” (Jentz & Wofford, 2008) by building trust and meeting one-on-one with partners in order to understand the contours of their respective organizations as well as their experience within MEEP up to that point. My goal was to gather as much qualitative data as possible to inform my diagnosis. Since my arrival mid-summer coincided with a big school funding reform fight in the State Legislature, I conducted my one-on-one meetings over a longer period of time and at the same time as I fully engaged with actions the partnership took to advocate for equity measures in the language of the school funding bill. By the end of 2019, I had met with 18 out of 28 active partners individually, conducted a survey in October that received 17 responses (Appendix A), and facilitated a SWOT analysis with a focus group of eight partners and our intern (Appendix B) in November.

Compelled by my research for the RKA, I sought to gather information about each partner’s experience in the coalition and their perception of MEEP’s organizational identity and mission. I wanted to learn what partners thought about our advocacy, the leadership and learning structures within MEEP, and what our ultimate goals were. I listened as closely as possible to partners’ priorities, questions, and suggestions, and as time passed realized that there was a disconnect between partners’ expectations and understandings and what MEEP had the capacity to undertake as it was structured at the time. Foreseeing the need for adaptive change in MEEP’s future, I wanted to ensure partners felt heard and included in the diagnosis phase so that they would be more willing to be part of the change process during the strategic thinking phase and in the adoption of
pilot structures that could later become formal operational systems within MEEP; in so doing, I hoped to be able to claim a mandate for change.

Results from the Fall 2019 we administered revealed that, by and large, partners were increasingly satisfied with their MEEP experience; and yet, the evidence suggested that more work could be done to strengthen partner relationships, teaming, and coalition dynamics. Figure 3 shows that close to 60% of respondents agreed that “my relationships with groups at the table are stronger as a result of my participation in MEEP”. While still a positive indicator, the transformative nature of our goals demands more than agreement – the enthusiasm factor captured by a “strongly agree” response comes closer to the kind of energy we want to harness around the table to successfully drive change.

**Figure 3: Fall 2019 MEEP Partner Survey: My relationships with groups at the table are stronger as a result of my participation in MEEP.**

![Bar chart showing responses to the survey question](image)

Figure 4 shows additional survey data that signaled to MEEP’s leadership team the need to more directly and deliberately address coalition dynamics. Although 41% of respondents strongly agreed that “our current meeting structure gives me the opportunity to have my voice heard,” one person disagreed with this sentiment and two people expressed feeling “neutral” about it. The responses to this particular question had the greatest variance of any in the entire survey, which indicated to me that there was more work to be done to establish psychological safety in the room.
During this time, I also assessed MEEP’s group composition and worked with Natasha to form an increasingly more diverse and inclusive table. After some discussion, we agreed to recruit more organizational partners that had the following attributes: authenticity (connectedness to underserved students and families), credibility (track record of supporting high-needs communities), and “policy muscle” (advocacy prowess). We especially sought out direct-service organizations and organizations led by people of color. I spent the first couple of months of residency getting to know partners so that we could more clearly map the needs of the partnership. With this map and the aforementioned attributes in mind, I was able to methodically create a recruitment strategy that prioritized rounding out MEEP’s composition based on the profiles of existing partners.

Through my conversations, the survey, and small group interventions, I also learned that partners were eager to kick off advocacy focused on increasing educator diversity in Massachusetts. MEEP’s leadership team struggled to figure out how to kick off that campaign given how much attention we had to dedicate to our school funding work. To push the issue forward, Natasha and I decided that I would convene a small
working group that operated independently and could build the foundation for this next campaign, as she took sole lead of our school funding advocacy. At our monthly MEEP meeting on October 8th, I announced that I would be leading this working group; by the end of the week, nine partners volunteered to participate, seven officially and two others who decided to consult directly with me. I was thrilled by their excitement and also decided to leverage the working group as a pilot for some innovations I was considering for the partnership at large.

Through the working group, I pressure tested several practices that were encouraged in the RKA literature, such as aiming high, fostering solidary motivation, developing leadership, incorporating reflective practices in order to fail well in the absence of success, and acknowledging team boundaries as a strategy for teaming. This group served as a laboratory for some ideas and queries drawn from both my research and the data I continued to gather from partners. It also allowed me to deepen my relationships with these individuals and flex my leadership muscle.

This phase was instrumental because it gave me space to build relationships with leaders inside and outside of MEEP. As I thought about my strategic project, I recognized that I needed to address group composition early. The literature about social movements indicated that successful coalitions for educational equity were diverse, cross-sector, and inclusive of parents, community members, and ground-level advocates, like CC9 in the South Bronx. My conversations with Natasha and the data from my one-on-one meetings, the survey, and focus group clarified for me that we needed to recruit more leaders of color, more direct-service organizations that support underserved Massachusetts students and families, and more homegrown partners. During this phase, I engaged 20 education
advocates of color, securing the active participation of 14 of them within MEEP. All 14 leaders represent direct-service organizations and half of them are homegrown and grew up in underserved communities in Massachusetts.

**Phase 2 (November 2019 – January 2020): Strategic thinking and pilots**

During this phase, I felt secure in the trust I had built with colleagues and partners, confident in my own leadership, and proud of the diverse coalition increasingly represented around MEEP’s table. My research offered suggestions about potential next steps that could support my strategic project, resulting in the diagnosis that MEEP should rethink its vision and organizational strategy in order to more effectively organize and mobilize, and thereby work towards movement-building. Given the data I had gathered and my facilitation of the Educator Diversity Working Group, I felt ready to follow up with Natasha in early December and invite her into my thinking so that we could continue setting strategy and testing possibilities.

I shared the ideas put forth by Han (2014) and we discussed the tension between mobilizing and organizing for the partnership. Organizing requires stewarding relationships, building capacity, and developing leadership, all of which would demand that we slow down and spend more time on those priorities; however, the luxury of time is rare in advocacy. We understood that, ideally, MEEP would have the capacity to engage in a hybrid of strategies that tapped into elements of both mobilizing and organizing.

Since the decision to adopt a hybrid organizing-mobilizing strategy would have implications for partners’ time and level of commitment, Natasha and I agreed that we needed to invite them into the conversation. We highlighted trends that emerged from the
data, making note of implications those trends might have for MEEP’s vision, structures, and advocacy (Appendix C), and agreed that we needed time outside of regular monthly meetings to address these opportunities inclusively and deliberately with partners.

At our last MEEP meeting of the year on December 6th, I invited partners to form part of an optional strategic planning session in January to set the course for the next year of work. Out of 18 partners who were present, 18 volunteered to participate. This strategy session would serve as another opportunity for individuals to see themselves as stakeholders of MEEP, to team up, and to share leadership. In early January, the leadership team met to co-create the agenda for the “Vision & Strategy Retreat”, as we ultimately called it. It was encouraging to see that we were aligned about the top agenda items that would be discussed, and that we all saw great value in facilitating this conversation with the group at this particular moment for the partnership.

To prepare MEEP for the retreat at the end of the month, I previewed an important learning at our January 13th meeting. I sought to spark teaming by engaging in an organizing practice that would mitigate what Edmondson (2013) terms “taken-for-granted assumptions”, or mindsets, about who is right, who knows what, and who holds authority. To do so, we engaged in an asset-mapping exercise that invited partners to share their personal and organizational assets with the group: (1) their knowledge/areas of expertise, (2) skills and talents relevant to our work, (3) relationships with stakeholders (e.g. elected officials, local reporters, community leaders), (4) social and civic affiliations, (5) physical resources, and (6) communities they are connected to. We also encouraged them to name personal or organizational needs that they wanted support with from partners.
Given what I knew about the complicated politics of various groups in Massachusetts, I anticipated some pushback or discomfort about what MEEP would do with this information. I displayed the word “trust” on a slide in big, bold, blue letters and invited the 17 partners present to name any hesitations and questions they had about engaging in the exercise. Through my one-on-one conversations and small group efforts, I had laid the foundation of open sharing, asking questions, authentic participation, and acknowledgement of and respect for each partner’s differences; yet, this whole-group exercise tested partners’ ability to trust each other, and us, more personally.

I waited and made eye contact with everyone and was met with warm smiles. One partner broke the calm silence and shouted, “love the font!” We proceeded after that. The room buzzed with conversation and anecdotes about what each person could contribute to the group. On multiple occasions, the din was punctuated by exclamations of “Me too!!” and “Wow, that’s so cool”. This meeting was the first time I felt and saw the impact of psychological safety within the group. The building of trust had occurred incrementally up until that point, but our early January meeting represented a watershed moment when MEEP as a whole consented to a different kind of trust and engagement with each other.

On January 24th, MEEP participated in its first Vision & Strategy Retreat since the group formed in September 2018. This effort was yet another pilot – this time, I observed the extent to which partners were willing to volunteer more of their time for the “soft stuff” (vision, mission, coalition dynamics, team building), even when the urgency of the “hard stuff” (taking action and policy stances together) remained present. I also wanted to gauge their willingness to move beyond their organizational roles and connect as people in order to think outside the box about what MEEP could be. 19 partners
attended the 2.5-hour retreat focused on envisioning MEEP’s North Star, defining our 2020 policy agenda, and conducting an assessment of our operational needs.

**Phase 3 (February – March 2020): Prioritization and systems design**

Following the retreat, we gathered all sets of data and feedback from partners and met mid-February to categorize their comments from the retreat and then prioritize follow-up action. We presented the data and an initial plan of action to the partnership at our March 4th meeting, securing additional feedback and collaboratively deciding on next steps. We had hoped to finalize our North Star vision statement by the end of this meeting yet received feedback that required some adjustments be made before a vote could be taken. We agreed on what MEEP’s 2020 policy agenda would contain and listened to partners’ desire to further unpack each policy item further in order to clarify what MEEP’s advocacy uniquely sought to accomplish.

Partners also shared feedback about the new systems of operation that garnered interest during the retreat and approved that Natasha and I move forward with plans to create an online “MEEP Hub” and design a MEEP Member Guidebook. The hub will include a shared calendar, a partner asset map, policy and practice resources, all of MEEP’s past publications and documents, and ideally, a forum for partners to engage with each other virtually. The Guidebook will offer clarity for new and existing partners about MEEP’s history and vision for Massachusetts, our shared values, expectations for partners and their contact information, a roadmap of how we conduct business, and a full listing of organizations we collaborate with. Though just the beginning, these two initial structures will support the internal organizational development of the partnership, further define MEEP’s identity, and help solidify partner engagement.
Shortly after our March 4th meeting, the COVID-19 pandemic erupted in the United States and compelled us to pause ongoing plans in order to responsibly address the ongoing crisis. While we continued to push forward, the priorities shifted for the remainder of my residency.

Evidence to Date

Throughout residency, I collected various forms of evidence to measure the progress of the goals outlined in my strategic project and to assess which actions were needed to move closer to the ultimate goal of building a movement for educational equity in Massachusetts. In the table below, I summarize the actions and subsequent results that informed the progress of my strategic project. The left-most columns align to the “if” or “then” sections of my theory of action, the middle columns capture relevant outputs and outcomes connected to each action, and the right-most column shows the degree to which each goal has been met to date, in my estimation. In the following section, I offer my thoughts about how and why things resulted as they did.

<table>
<thead>
<tr>
<th>Theory of action “if” statement</th>
<th>Relevant outputs and outcomes</th>
<th>Progress</th>
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| Build the Massachusetts leadership team’s understanding of what a successful movement for educational equity could look like | • Engaged in regular conversations with Natasha and our consultant to discuss the central ideas emerging from my research; offered input and counsel grounded in my findings.  
• Tested different organizing strategies (e.g. reflection practices and rotating leadership) during MEEP monthly | |
meetings, the Educator Diversity Working Group, the focus group SWOT analysis, and the Vision & Strategy Retreat; then reflected alongside the MA team to assess effectiveness, discuss impact, and inform future planning.

| Establish organizational practices that combine elements of organizing and mobilizing | • *Organizing*: dedicated time to teaming and relationship building via focus groups, iterative asset-mapping exercises, Vision & Strategy Retreat, group reflections, new mechanisms for feedback, and a MEEP Member Guidebook & Hub to support collaboration & relationship building.  
• *Mobilizing*: deepened partner recruitment and doubled the number of organizations within MEEP (from 13 to 27); exercised intentional retention conversations; revamped sign-on processes for publications and actions; expanded use of google docs & surveys to facilitate communication. |
|---|---|

| Strategically expand MEEP’s group composition so that it empowers historically underserved communities and ground-level advocates | • Increased active membership by almost 100% (from 21 active partners in June 2019 before my arrival to 41 active partners in February 2020).  
• More than doubled the number of partners of color (from 12/21 on 6/2019 to 27/41 on 2/2020).  
• Added six more organizations that provide direct-service to families in |
underserved MA communities (now 12/27 organizations).

- Recruited 4 additional homegrown leaders (now 8/41 partners or 20%).
- Encouraged and supported the leadership of partners of color.

Create systems that encourage distributed leadership and effective teaming to facilitate strong connections between diverse partners and greater ownership of MEEP

- Leveraged working groups to carry out multiple streams of work (e.g. Educator Diversity Working Group).
- Launched shared MEEP partners asset map to enable partner-to-partner engagement.
- Tapped specific MEEP partners to act as recruitment ambassadors for MEEP.

Build the Massachusetts leadership team’s understanding of what a successful movement for educational equity could look like. This has been an area of great success. My collaboration with the Massachusetts leadership team has been extensive and regular, which provided me with ample opportunity to involve them in my learnings and ask for their opinions in return. Informed by my research – particularly Han’s (2014) call to build internal capacity and distribute leadership, as well as Edmondson’s (2013) recommendations for effective teaming and failing well – I made suggestions over time about ways we could enhance MEEP’s work in Massachusetts. The leadership team endeavored to adopt strategies used in education organizing by (1) defining our organizational identity as organizers, mobilizers, or both, (2) clearly articulating what we were “aiming high” for, and (3) creating internal structures that could accelerate partner development and further our advocacy. Appendix C shows the
core ideas I presented to Natasha on December 5th based on my research; the highlighted sections indicate the priorities the two of us identified based on our conversation.

My experience facilitating the Educator Diversity Working Group also informed my discussions with the leadership team. After our first EDWG meeting, I invited partners to create “SMARTIE” goals that could guide MEEP’s Educator Diversity campaign. I shared written guidance that explained how to craft a SMARTIE goal – especially how to articulate a goal that was Inclusive and Equitable – but made the mistake of assuming more knowledge than I should have. The goals partners returned with for our second meeting were wildly different and so my mistake became clear: as an organizer, I should have developed partners’ capacity to engage in this task successfully before having them complete the task. Noting this misstep, I sought to fail well and learn strategically by having partners reflect about what proved challenging about that approach to goal-setting and asking them to share what should be done differently the next time. By sharing learnings like this one with Natasha and our consultant, they increasingly expressed resonance with the suggestions I offered and excitement about incorporating tenets of successful movement-building into how MEEP operated.

Establish organizational practices that combine elements of organizing and mobilizing. Good progress has been made in this area as well. Through the working group, iterative asset mapping, the retreat, more frequent whole-MEEP reflections, and incorporation of strategies that enabled leadership development and deepened partner engagement, we were able to develop MEEP’s muscle as an organizing body that is able to tap into its community assets and relationships to drive the work forward. We also started to see more evidence of the “rings of leadership” model demonstrated in Figure 2.
For example, several partners volunteered on their own accord to help me recruit new members and act as ambassadors for MEEP.

On the mobilizing side of the equation, I focused on creating more efficient structures to move our work faster. Having significantly grown the number of partners and organizations within MEEP, I used technology to rally partners and sought their input systematically through (1) the use of google docs to formally share and house information, (2) surveys to capture partner input quickly and cleanly, and (3) google forms to secure sign-ons for publications and other actions.

**Strategically expand MEEP’s group composition so that it empowers historically underserved communities and ground-level advocates.** I dedicated significant attention to this priority and the evidence demonstrates that there has been great progress.

**Figure 5: MEEP Membership Growth Pre and Post Residency**

![Figure 5](image)

Figure 5 shows that the partnership grew by more than 100% from 21 to 41 active partners from the time I started to the writing of this capstone, and the number of partners...
of color more than doubled. To achieve this growth, I adopted a two-prong approach: first, I strategically recruited community-based organizations led by people of color and leaned on friends and colleagues in Massachusetts to identify additional CBO’s outside of my radar that were doing critical work in communities across the state. I also held deliberate retention conversations with partners of color who I was worried would become inactive partners without clear incentives to stay or who had great leadership potential and would benefit from a push to bring their full power to MEEP.

I was intentional about empowering the voices of leaders of color and historically excluded advocacy organizations at our table. I advised and coached younger leaders of color to build their confidence and encouraged them to share their perspectives and expertise authentically with the group. I modeled this behavior and made sure to show up as my full self with them and in meetings. I dedicated time to several partners of color to discuss their careers, upon request, and other matters unrelated to MEEP’s central goals. Last and most important, I made sure that all partners knew I cared about them as people.

Moreover, I worked with Natasha to ensure that the voices we highlighted in our publications, editorials, and media requests always reflected the underserved communities and ground-level advocates that we sought to uplift. In the near future, we hope to formalize this by organizing media trainings for our partners, for example, so that we continue growing their capacity as spokespeople and front-line leaders. Importantly, I have been cautious to not tokenize any of our partners of color through this process. To do this effectively, I made sure that historically marginalized partners were co-creators with us and that power to design and decide rested with them, not us.
Create systems that encourage distributed leadership and effective teaming to facilitate strong connections between diverse partners. This is an area of emerging progress that continues to evolve quickly as we adopt new structures, especially following the retreat in January. The Educator Diversity Working Group was the first pilot intended to distribute leadership and distribute work. We met twice in person and twice on the phone, pushing the thinking forward for MEEP’s educator diversity campaign and identifying for the leadership team where challenges might lie when the work moved to the full partnership. Interventions like the asset mapping practice also highlighted the desire partners had to engage with each other. When I introduced this exercise on January 13th, I recognized that openly sharing one’s assets and relationships required trust. I invited partners to share their concerns, but none emerged.

Although I initially worried that partners were just reticent to share, the following note from one of our newest and youngest partners of color confirmed the psychological safety that was indeed palpable in that meeting and again at the retreat a couple of weeks after: “Thanks for cultivating a community of idea-sharing and openness. People feel comfortable letting you know their opinions. For someone with so many, I love it,” (R.H., email communication, January 25, 2020). Another partner, an older Latina, now regularly drives in from Central Massachusetts at 5am on days when we have our meetings because, as she put it when we debriefed after the retreat, “I decided that MEEP is a priority for me,” (B.R., personal communication, January 24, 2020). Both comments point to increased engagement, trust, and a collaborative spirit.
<table>
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| MEEP will be positioned to speak as an authentic & credible voice for educational equity and justice in Massachusetts and thereby achieve meaningful changes in policy and practice for students of color, economically disadvantaged students, English learners, and students with disabilities | • Education Committee Chairwoman Rep. Alice Peisch invited MEEP to offer recommendations that were then incorporated into the Student Opportunity Act (SOA)  
• MEEP was a key player in ensuring that equity provisions remained in the language of the SOA bill as the bill moved through the legislature; we promoted passage of the legislation through a concerted advocacy campaign – the SOA secured $1.5B in investments for historically underserved communities and student populations (particularly English learners and students with disabilities)  
• MA Commissioner of Education Jeff Riley invited MEEP for a special briefing to offer feedback before DESE shared guidelines with districts for the implementation phase of the SOA | (progress indicator) |
| MEEP will galvanize historically divided groups from the grassroots, reform, and business communities to launch an unprecedented | • There is insufficient evidence to suggest that MEEP’s work qualifies as a movement at the moment. We need to deepen our statewide reach and continue aiming for equitable representation of grassroots, reform, and business communities at our table. | (progress indicator) |
MEEP will be positioned to speak as an authentic and credible voice for educational equity and justice in Massachusetts and thereby achieve meaningful changes in policy and practice for students of color, economically disadvantaged students, English learners, and students with disabilities. The progress made in this respect has been very encouraging, as MEEP was increasingly approached by powerful stakeholders in the state for counsel and input. Noticing the diversity and expertise of our partnership, Education Committee Chairwoman Alice Peisch invited MEEP to provide recommendations on two separate critical occasions as the Student Opportunity Act (SOA) made its way through the State Legislature.

MEEP’s leadership team and our partners worked diligently to build relationships with elected and appointed leaders behind the scenes in order to grow our influence throughout the legislative process. We engaged in rigorous conversations about policy at our meetings and discussed the direct impact on people’s lives that SOA would have. The diverse group of advocates at our table provided nuanced perspectives and suggestions that allowed our leadership team to respond quickly through private meetings, op-eds and publications, and resource guides for community stakeholders and education leaders.

In October 2019, when the Senate version of the bill threatened to remove certain equity provisions that would ensure district accountability, MEEP played an important role in influencing legislators by drafting a letter with 13 signatories that was sent to lawmakers in both chambers. We received data that 40% of members opened and read our statement, a testament to MEEP’s rising power given that the open rate for state
legislators is typically 24%. We learned afterwards from lawmakers that our advocacy greatly helped legislators fighting to retain accountability measures when the conference committee gathered. Our assistance and advocacy helped ensure that the SOA passed at the end of 2019, securing $1.5B dollars in new investments for the state’s most underserved school districts and students.

The Department of Elementary and Secondary Education (DESE) also took notice of MEEP and invited partners to a private briefing in January about the state’s plans to support implementation of the SOA. 20 of our 33 partners at the time showed up representing the entire state; they were racially and generationally diverse, representing both direct-service community-based organizations and more established education reform groups. Partners pushed the Commissioner to incorporate stronger guidance about family and community engagement for districts. He and his team listened and worked with us to ensure that that guidance was reflected in the implementation plans that districts would have to submit later in the Spring.

MEEP will galvanize historically divided groups from the grassroots, reform, and business communities to launch an unprecedented statewide movement for educational equity. Although there are early signs that show great promise on this front, as detailed above, much more work needs to be done for MEEP and our advocacy to constitute a movement for educational equity as articulated by Jean Anyon (2009). We have yet to shift the arrangements of power in Massachusetts that have caused longstanding inequities and disenfranchisement of families and communities – that will certainly take more time and years of “spadework.” Furthermore, our statewide reach
needs to expand beyond metro areas so that MEEP can authentically claim to represent the voices of underserved communities across the entire Commonwealth.

**Analysis**

To better understand the outcomes of my strategic project to date, I examine the evidence above through the lens of Charles A. O’Reilly & Michael Tushman’s (2011) notion of *organizational ambidexterity* and David A. Garvin, Amy Edmondson, and Francesca Gino’s (2008) framework for a *learning organization*. Together, they offer great insight about why things resulted as they did and provide a potential roadmap for actions that can be taken moving forward, which I will detail in the Implications section.

**Organizational Ambidexterity**

In a fast-changing world where competition and societal shifts are a certainty, organizations must find a way to persist over time and remain profitable. O’Reilly and Tushman (2011) argue that long-term organizational sustainability is only possible when groups are able to keep an eye on the past and a pulse on the future. They call this balancing act *organizational ambidexterity*, or the “ability to exploit existing assets and positions in a profit-producing way and simultaneously explore new technologies and markets—to configure and reconfigure organizational resources to capture existing as well as new opportunities,” (O’Reilly & Tushman, 2011, p. 5).

In other words, ambidextrous organizations *exploit* extant profitable strategies in order to keep generating revenue and also *explore* new possibilities for gains by sensing what is in the competitive environment and seizing new pathways for success. James G. March adds to this concept: “The basic problem confronting an organization is to engage
in sufficient exploitation to ensure its current viability and, at the same time, devote enough energy to exploration to ensure its future viability,” (March, 1991, p. 85). When deployed simultaneously, these strategies allow organizations to continuously evolve, remain relevant, and experience success.

Although O’Reilly and Tushman focused their research on for-profit companies and not volunteer-based civic associations like MEEP, the lessons from their work remain highly applicable in the context of my strategic project. To maintain our ecological fitness within Massachusetts – a state known for its rich nonprofit ecosystem, and hence, competition – Natasha and I had to quickly learn how to drive our advocacy on multiple levels. After joining the team in July 2019, I engaged in intensive relationship-building and took time to diagnose both MEEP and our context. Through almost two dozen one-on-one conversations, a MEEP-wide survey administered in October, and a focus group SWOT analysis in November, it became patently clear that the partnership would need to learn to diversify its strategy and clarify its identity.

Up to that point, both Natasha and I were focused on the same priority: driving the school funding campaign forward. However, the data revealed that partners were eager to engage around additional policy issues and wanted more from MEEP than we could offer at the time (professional development, opportunities for social interaction, and so on). This was when MEEP’s own balancing act began. Although O’Reilly and Tushman examine ambidextrous sub-organizations, I borrowed the concept of ambidexterity to understand how an umbrella organization comprised of sub-organizations like MEEP could operate and innovate most effectively.
To be sure, MEEP’s existence generally represented an innovation – an explore activity – for The Education Trust, but for this capstone analysis I am focusing on MEEP as the unit of analysis. Within MEEP, activities related to status quo work – the school funding campaign, mostly orchestrated by Natasha – represented the exploit side of our efforts that pushed forward “business-as-usual” that was ongoing. In addition to this, I was granted a mandate to innovate and reimagine, thereby owning much of the exploring via innovations like the Educator Diversity Working Group and the Vision & Strategy Retreat. I also adopted an explore mindset in my approach to partner recruitment and retention, MEEP meetings, and when ideating for strategic shifts that would ensure MEEP’s future viability as a powerful advocacy group in the state.

Natasha and I exercised our *dynamic capabilities*, “the ability of firms to sense, seize, and reconfigure organizational assets to adapt to changed environmental conditions,” (O’Reilly & Tushman, 2011, p. 6). As we sensed that energy within the partnership was shifting – and the policy space around us evolving – we endeavored to keep pace by reorganizing how we carried out the work. In MEEP’s case, Natasha and I were the key organizational assets that could be rearranged in order to maximize productivity. Instead of having both of us focused on the same priorities, we divided and conquered more work, which brought us closer to meeting our goals. While Natasha exploited mobilizing strategies and some organizing strategies (e.g. policy knowledge capacity building) that were routine for MEEP’s school funding campaign at the time, I explored innovative possibilities through the use of additional organizing tactics. This approach brought us closer to a hybrid model of organizing and mobilizing for MEEP, as articulated in my theory of action.
O’Reilly and Tushman offer five elements in their theory of the ambidextrous organization that help explain where and why I was successful and where and why I fell short. They believe ambidexterity is most successful when these conditions are met:

- “A compelling strategic intent that intellectually justifies the importance of both exploration and exploitation,” (O’Reilly & Tushman, 2011, p. 9).

As shared in the Evidence section that preceded, I had many conversations with the Massachusetts leadership team to inform them about my research, learn from their expertise, and co-create possibilities for MEEP’s future. Increasingly in the Fall, these conversations convinced us that, to bring on new partners and retain those who had been around, we needed to move on multiple priorities at once. In order to disrupt the status quo in the advocacy world in Massachusetts and spark an unprecedented movement for educational equity, we needed to exploit and explore (even if we did not use this terminology at the time).

The leadership team was aligned that this was how we needed to proceed to meet our vision. We exploited the extant mobilizing and organizing strategies that MEEP was accustomed to through the school funding campaign and further explored innovative organizing approaches through my work, which needed to be addressed through a separate unit in order to take off. We invited partners into this conversation at the Vision & Strategy Retreat in January, where we shared the leadership team’s interest in having MEEP assume a “multi-modal” approach, as we called it then.

Seeking alignment, I invited partners to engage in a discussion about the difference between organizing and mobilizing and asked them to share their thoughts about where MEEP’s organizational identity should lie on that spectrum. One of our
founding partners, an established black civil rights leader in the Commonwealth, declared with no ambiguity, “Mobilization without organization is empty,” (H.T., Vision & Strategy Retreat, January 24, 2020). Another founding partner, a respected older black woman, echoed his sentiment, “We gotta do both,” (J.C., Vision & Strategy Retreat, January 24, 2020). Soon enough, all 19 partners present agreed. With partner buy-in secured, our leadership team felt confident about moving MEEP forward with a multi-modal, or ambidextrous, strategic approach.

- “An articulation of a common vision and values that provide for a common identity across the exploitative and exploratory units,” (O’Reilly & Tushman, 2011, p. 9).

At the same Vision & Strategy Retreat, we discussed what MEEP’s North Star should be. Partners understood that members of MEEP shared the value of educational equity and sought to advocate on its behalf; and yet, many within MEEP wanted a clearer articulation about what specific outcomes the group was ultimately driving at. We conducted a brainstorming session and had partners articulate on sticky notes words, phrases, and ideas that should inform MEEP’s North Star vision. Although an ongoing process still at the writing of this capstone, this ideation should result in a common identity that rallies all partners and unites all components of MEEP’s advocacy across the exploitative and exploratory units, so that even if workstreams within the coalition diverge over time, all partners still feel part of the same team.

The current lack of a common identity that unites both dimensions of work could be part of the reason why distributed leadership and sub-teaming remain a challenge for MEEP despite some auspicious early progress. It is also why this aspect of my theory of
action has experienced less movement relative to others. By this point in time, I would have liked to see more partners driving sections of MEEP meetings or taking initiative to lead on an aspect of a campaign, for example. Since the Student Opportunity Act passed right before the new year, however, January and half of February were absorbed by advocacy supporting adequate SOA stakeholder engagement in high-needs communities. The Department of Elementary and Secondary Education gave school districts until April 1st, a lightning-quick turnaround, to secure community input, draft plans, and submit them. This limited the leadership team’s capacity to develop partners’ ability to lead parts of meetings. Although many partners currently regularly share their expertise and resources with the leadership team, that still does not represent a distribution of leadership across MEEP, given that leadership still flows through me and Natasha.

In reference to their case study of USA Today, O’Reilly and Tushman claim that the newspaper’s “strategy and vision, and a common set of values around fairness, accuracy, and trust, helped knit together a highly differentiated organization,” (O’Reilly & Tushman, 2011, p. 15). It follows that, once MEEP aligns on a vision and set of values that drive the entirety of our efforts, then we will be able to create the appropriate “architectures” to sustain those efforts internally, the possibilities for distribution of leadership will be clear, and strategic teaming processes will take shape. One challenge to keep in mind, however, is the tension between increasing partners’ leadership within MEEP and MEEP being a volunteer association. As we ask partners to do more, we could potentially confront questions about compensation for people’s time or conflicts of interest regarding funding.
• “A senior team that explicitly owns the unit’s strategy of exploration and exploitation; there is a common-fate reward system; and the strategy is communicated relentlessly,” (O’Reilly & Tushman, 2011, p. 9).

O’Reilly and Tushman (2011) believe that there needs to be consensus within the senior team about adopting an ambidextrous strategy. While this is true for MEEP’s leadership team, there is work that still needs to be done to refine our messaging and communicate about it consistently with each other and with our partners. In our case, the “common-fate reward system” that benefits the whole leadership team is not necessarily always monetary. Yes, securing funding from donors year-to-year is a common fate we are all held to and in that sense our strategy is bound together; however, the more motivating common-fate reward is the achievement of our advocacy goals. If our exploit (mobilizing) and explore (organizing) units of work are successful, we all move closer to achieving our purpose in Massachusetts – educational equity – and we all win.

• “Separate but aligned organizational architectures (business models, structure, incentives, metrics, and cultures) for the exploratory and exploitative units and targeted integration at both senior and tactical levels to properly leverage organizational assets,” (O’Reilly & Tushman, 2011, p. 9).

Although MEEP’s advocacy strategy became much more defined as Fall turned to Winter and our leadership team agreed that an ambidextrous approach was the right one, MEEP’s “architectures”, or organizational arrangements, had yet to catch up. The Educator Diversity Working Group was one intervention that we leveraged to sustain that particular explore effort, but the structure itself was more ad-hoc than formal.
By virtue of the volume of work we engaged with and the fact that Natasha and I were the only full-time staff members on the leadership team, our “architectures” and workstreams crossed over often and certainly were not separate, although they were surely aligned. In other words, since distributed leadership was already challenging and sometimes unclear between me and Natasha, distributing leadership across MEEP partners was an even more distant area of focus for us.

O’Reilly and Tushman (2011) outline how all three companies that failed to remain viable over time lacked this particular element – separate yet aligned architectures – and therefore did not achieve organizational ambidexterity. They explain, “In the case of SAP, responsibility for the exploratory venture… was split between two functional heads with the result that effective coordination never occurred and decisions were made slowly,” (O’Reilly & Tushman, 2011, p. 16). In the case of MEEP, decisions were indeed made more slowly since, as in the study of SAP, responsibilities beneath the exploit and explore units were split between me and Natasha. The need to coordinate across functional units likely has also impacted our ability to optimize partner mobilization.

Although the leadership team has dedicated significant time to prioritizing the partnership’s external advocacy activities and internal organizational development, we need to continue more seamlessly integrating MEEP’s various priorities so that we can effectively act on multiple issues at the same time, and so that we can properly mobilize and organize our partners.

- “The ability of the senior leadership to tolerate and resolve the tensions arising from separate alignments,” (O’Reilly & Tushman, 2011, p. 9).  


The authors make clear that “in each successful case [they studied], there was a clear, identifiable leader and forum to resolve conflicts and make definitive resource allocation decisions,” (O’Reilly & Tushman, 2011, p. 17). As State Director for Massachusetts, Natasha worked hard to integrate the various workstreams within MEEP into the partnership’s overall strategy. As our approach evolved to include ambidexterity, Natasha included my explore work into grant proposals, for example, thereby putting herself and our funding on the hook for outcomes related to those exploratory ventures. Yet the leadership team has yet to resolve tensions that arise from limited capacity and time; explore activities were prioritized second to exploit activities and balancing both became challenging in the early new year as the partnership grew in size and our work increased.

It became clear that to achieve success with this new strategy we needed to grow our leadership team beyond just the two of us in order to departmentalize our efforts, operate well separately, and move more nimbly together. At USA Today, the general manager realized that to embrace organizational ambidexterity he needed to reorganize the senior leadership team. Once he did, the team was better able to navigate challenges associated with exploitation and exploration. We do not yet have the funding to expand MEEP’s leadership team, so this limited our ability to leverage and implement certain organizing strategies – like providing targeted professional development to build partners’ leadership and maximizing solidary motivation through team-building – as stipulated in my theory of action.

**A Learning Organization**

Like O’Reilly and Tushman’s (2011) concept of organizational ambidexterity, Garvin et al.’s (2008) framework for a learning organization equips systems with the
ability to better adapt to unpredictable circumstances. Given the dynamic nature of policy and advocacy, being able to respond quickly and ably to changing conditions provides an important competitive advantage. For MEEP to work well together across many lines of difference in a state still recovering from a polarized education landscape, we needed to function like a learning organization in order to meet MEEP’s objectives and those of my theory of action. I find that much of our success was sustained by a carefully-fostered culture that “cultivate[d] tolerance, foster[ed] open discussion, and transfer[red] knowledge,” (Garvin, Edmondson, & Gino 2008, para. 2).

Garvin, Edmondson, and Gino (2008) offer three building blocks that, together, create the conditions necessary for a learning organization to thrive. They are: (1) a supportive learning environment, (2) concrete learning processes and practices, and (3) leadership that reinforces learning. I will analyze the extent to which each building block was present within MEEP and contributed to the progress that we observed.

A supportive learning environment. Garvin et al. (2008) identify four characteristics of an organization that supports a learning environment: psychological safety, appreciation of difference, openness to new ideas, and time for reflection. We were very intentional about building psychological safety within MEEP, or “comfort expressing thoughts about the work at hand… [without] fear of being belittled or marginalized,” (Garvin, Edmondson, & Gino 2008, para. 8). From the outset, it was important for me to ensure that everyone felt equally able to participate in conversations and decision-making, but especially partners of color, younger partners, and partners working directly with families in high-needs communities.
When I first joined the team, I noticed that conversations were dominated by older more established partners and certainly by men, many of whom were white. I was charged with managing coalition dynamics and so I tackled this challenge in a variety of ways. First, I leveraged my relationships and one-on-one chats. I deliberately engaged partners in conversations about their role and voice within MEEP, rallied them to speak up, and as I often did when I was a classroom teacher, utilized “warm calls” to offer advance notice of discussion topics to boost certain individuals’ confidence and willingness to share.

Second, I openly invited honest dialogue whenever I facilitated conversations with partners, especially during monthly meetings, the Educator Diversity Working Group, and the focus group in November. In those settings, I opened by making clear that I did not hold all the answers and underscoring my belief that partners were brilliant and capable beyond measure. I asked genuine open questions, admitted when I did not know something, and when I sensed some were worried that their honesty might not be well-received, assured them that there would be no repercussions or hurt feelings for speaking up. I hoped that my own openness to feedback and new ideas would serve as evidence for partners that they, too, could show up authentically with the partnership.

Most importantly, however, I was responsive to partner feedback and readily incorporated their ideas into our plans, making sure to give them credit in front of the partnership or with Natasha if they were behind a particular idea. For example, during our Vision & Strategy Retreat I commended one of our partners for being one of the reasons why we took time to re-envision MEEP’s North Star as a group. Indeed, this particular partner had consistently brought up this point in two one-on-one conversations with me.
and in the focus group that conducted the SWOT analysis. He appreciated being recognized for that.

As MEEP grew, I remained vigilant that new partners felt equally able to contribute as soon as their first meeting. This, I have learned, is the true test of a strong culture: how quickly a new entrant feels safe. This was confirmed on two occasions: one of our partners, a Latina in her 30’s who grew up in a low-income community in Massachusetts, attended her first meeting after she and I had had the chance to connect one-on-one. I worked with her beforehand to dispel her insecurities and affirm her place at the table despite, in her words, not being “a policy person,” (E.P., personal communication, November 13, 2020). In her first meeting the following month, she spoke powerfully about making sure to not tokenize family engagement, speaking from a place of expertise given her job and from a place of personal experience given her background. This was only possible because there was psychological safety in the room.

Conscious of latent insecurities such as E.P.’s and invisible biases that could exist between partners, I facilitated an asset-mapping exercise in early January that allowed partners to see, acknowledge, and celebrate each other’s unique differences and commonalities. The process of identifying assets and the invitation to engage around each other’s strengths directly challenged extant presuppositions between partners. Instead, individuals connected with each other across areas of expertise, geography, age, and social position. I even noticed several partners exchanging phone numbers after this particular meeting. As Garvin, Edmondson, and Gino (2008) note, these sorts of exercises help foster psychological safety, which permits more fruitful teaming.
Another new partner, a black male entrepreneur in his mid-20’s, also confirmed the presence of psychological safety within the partnership. I met with him before his first partnership meeting as well and had an open two-way conversation with him about his trajectory in education and mine, as well as his hopes and concerns about joining MEEP. Weeks later, he was one of the most valuable contributors at the Vision & Strategy Retreat – only his second meeting with MEEP – and later that day at the briefing with the Commissioner. Unprompted, he sent a follow-up email, as cited previously, and said: “Thanks for cultivating a community of idea-sharing and openness. People feel comfortable letting you know their opinions. For someone with so many, I love it.”

Lastly, we made time for structured reflection. I recommended to Natasha that we conduct a brief “after-action review”, as encouraged by Garvin et al. (2008), following the passage of the Student Opportunity Act, which was a big advocacy win for MEEP. At our December meeting, we took account of our actions and reflected on what we did, what worked well, and what we would do differently in the next phase of the campaign. By the time of the retreat a month later, it was clear that the group was more practiced in collectively reflecting when we discussed possibilities for our 2020 policy agenda.

I believe that our openness to new ideas, embrace of difference, careful reflection, and attention to psychological safety created the kind of supportive environment necessary to foster a learning organization. This facilitated the leadership team’s ability to collaborate fruitfully, allowed us to mobilize and organize, and inspired partners to engage with each other and give more of their time to MEEP. It also enabled MEEP to develop an increasingly authentic and clarion voice for educational equity in Massachusetts.
Concrete learning processes and practices. Among MEEP’s various functions were providing technical assistance and building the capacity of our partners. Resultantly, our work together often flowed this way: we presented the problem through data, demystified or explained relevant policies and practices, offered possibilities for action, and then sought cycles of feedback from all partners while targeting individuals for counsel based on the issue at hand. We reflected back what partners told us as a composite, and finally, took action together. We followed “a series of concrete steps and widely distribute[d] activities” (Garvin, Edmondson, & Gino, 2008, para. 13) in order to gather information, test new ideas, analyze data, solve problems, and share knowledge.

We followed this approach with all advocacy actions, whether it was writing a letter to lawmakers or organizing a meeting with Commissioner Riley. This thorough process, while laborious at first, allowed us to team well and learn quickly. Although the infrastructure of a concrete learning process was in place, we still needed to do more to distribute leadership and conduct analyses in collaboration with more partners. The load of the thinking and generating still rested with me and Natasha, even as we increasingly used tools like Google Form surveys to source more of MEEP’s collective thinking.

Leadership opportunities also needed to be more accessible to all partners. For instance, in any given MEEP meeting, we had anywhere from two to ten partners who called in through Zoom video conferencing. We did not have systems in place that allowed people who attended in person and virtually to participate equitably in conversations and decision-making processes. Inevitably, partners who were physically present contributed more and those in distant parts of the state continually had to offer less to the collective. Moreover, reflective practices like the after-action review needed to
be further institutionalized, even as partners were exposed to the AAR on a few occasions. Once this core component of the learning process becomes routine, MEEP will be better able to organize partners, conduct advocacy more effectively, and mobilize with clarity of purpose and direction.

**Leadership that reinforces learning.** As stated in the preceding paragraphs, MEEP’s leadership team thoughtfully created an environment where all ideas were invited and where everyone was respected. We understood that to be successful – especially considering the diverse cross-section of leaders and organizations we aimed to unite – we needed to model those characteristics ourselves. Garvin et al. agree and believe that “when people in power demonstrate through their own behavior a willingness to entertain alternative points of view, employees feel emboldened to offer new ideas and options,” (Garvin, Edmondson, & Gino, 2008, para. 16).

Natasha and I made sure to contact partners when we believed they had expertise in or a connection to a particular issue, and practiced deference when a partner offered feedback that did not initially align with our thinking but was informed by that person’s work or life experience. We pushed back respectfully when appropriate and also welcomed tough questions. When I was tasked with leading portions of MEEP’s monthly meetings or smaller group conversations, I thought hardest about what questions to ask partners in order to normalize inquiry, invite curiosity and productive debate, and facilitate an open exchange of ideas.

By living these values as leaders of MEEP and working diligently to create an environment that observed them, we greatly expanded and diversified MEEP’s membership. Individuals from organizations that are typically not at decision-making
tables felt able to contribute powerfully to the partnership and give their perspectives without fear of marginalization or rebuke. At our retreat, partners felt comfortable expressing their ideas, from creating an “innovation cell” within MEEP to supporting youth advocates as part of our work. No thought was turned down and every single person in attendance participated. Surely, this can prove challenging as well, especially as the partnership grows. As we increase in size, we will need to adopt mechanisms – like polls or virtual chats – for providing input that allows us to move through partners’ contributions methodically without getting caught in a web of ideas and little action.

Along with the notion of organizational ambidexterity, Garvin et al.’s (2008) framework of a learning organization helps explain how the factors detailed above contributed to the success of aspects of my theory of action and makes clear why I observed less progress with regard to distributing leadership and adopting more organizing strategies as part of our advocacy. Their ideas also shed light on the elements of MEEP’s work that need to be further developed to incite a full-fledged movement for equity in the Commonwealth.

While MEEP continues to grow, our efforts to date have created a rock-solid foundation that signals great promise for the partnership’s ongoing advocacy. MEEP will contend with matters of long-term sustainability and scalability as our footprint expands and we continue making important gains towards realizing our North Star on behalf of underserved students and families. The last eighteen months make clear that MEEP’s advocacy and impact in Massachusetts is only beginning to be felt and seen.
Implications for Site

In analyzing the evidence up to this point, I identified several key implications for both the Massachusetts Education Equity Partnership and The Education Trust as a whole. I detail my observations for both below.

Recommendations for The Massachusetts Education Equity Partnership

To become a fully ambidextrous organization that can learn ably as well, MEEP should: (1) fully embrace the exploit/explore approach in both vision and strategy, (2) address architectural redundancies that slow down the work between me and Natasha, and (3) concretize learning processes that deepen the partnership’s ability to orchestrate actions, take those actions, and reflect systematically and regularly. These remedies will greatly expand MEEP’s ability to organize and mobilize, simultaneously developing the leadership and capacity of partners and moving them to action in greater numbers.

Although partners expressed a desire to explore and exploit, MEEP’s mission statement did not explicitly articulate this priority. At the time, we described ourselves this way: “The Massachusetts Education Equity Partnership is a collective effort of civil rights, social justice, and education advocates from across the Commonwealth working together to promote educational equity for historically underserved students in our state’s schools,” (retrieved from www.masseduequity.org). As we continue to define our organizational North Star, it will behoove us to explicitly name a focus on exploring solutions to ensure educational equity as part of our revised statement of purpose.

As O’Reilly and Tushman point out, it is critical to articulate a “common vision and values [in order] to promote a common identity across explore and exploit units,” (O’Reilly & Tushman, 2011, p.15). All segments within MEEP must feel that they are
driving at the same goals, even if the work of different sub-teams looks different. To integrate explore and exploit units of work, coherence needs to flow from a vision that clarifies the organizational identity.

Once a common identity is established, the structures of MEEP will need to be responsive to that fact. In other words, the way we structure our work will need to shift so that there is a clearer division of labor within the leadership team. As mentioned in my analysis, although Natasha and I are aligned, our work is rarely separate, as recommended by O’Reilly and Tushman (2011). While our collaboration is part of what has made us successful up to this point, we must consider creating internal architectures that allow us to both move separately on explore and exploit projects and, when necessary, act nimbly together through deliberate iterations of work.

To sustain this model successfully requires a larger team so that the areas of work that overlap between me and Natasha can be owned by another colleague. We know from O’Reilly and Tushman’s (2011) research that several companies they studied ended up reorganizing their leadership teams in order to reduce redundancies and clarify roles. MEEP should take time to clearly distinguish division of labor; in so doing, the partnership can more successfully function like an ambidextrous organization, getting more work done faster, distributing leadership and responsibility more effectively across partners, and doing the necessary “spadework” to achieve small wins that over time become a movement, as civil rights activists Jean Anyon and Ella Baker recommend.

MEEP needs to also institutionalize the learning processes that live at the core of advocacy and organizing. Garvin et al. make clear that “learning processes involve the generation, collection, interpretation, and dissemination of information,” (Garvin,
Edmondson, & Gino, 2008, para. 13). We are currently adept at collecting and disseminating information but are sorely missing structures that sustain the generation and interpretation of information, as well as reflective practices that allow partners to analyze the choices we make as an advocacy group.

To achieve “maximum impact” as a learning organization, Garvin et al. (2008) argue that knowledge-sharing practices are essential. Knowledge-sharing can be internal, like after-action reviews, or external, like regular forums with experts in the field who can inform our efforts. By constantly engaging partners in reflection, MEEP will become a more generative organization and more proficient interpreting problems and opportunities. This will expand the critical thinking capacity of the partnership since ideation will reside more explicitly with everyone, not just the leadership team. The goal should be for these learning processes and behaviors to be innate to how MEEP operates.

**Recommendations for The Education Trust**

In the few years since The Education Trust launched its state strategy, it has supported 12 state advocacy teams that operate across sectors and often across political ideologies and are pushing for changes in policy and practice to advance educational equity. In some states, including here in Massachusetts, these coalitions are already helping to elevate the voices of individuals and organizations that know their communities best yet have often been excluded from decision-making tables. Ed Trust is now poised to deepen its state strategy in order to inspire the type of national movement for educational equity that the organization wants to see.

It is important to note that all 12 coalitions conduct their advocacy differently. Due to particularities about local context and the kind of relationships Ed Trust staff have
on the ground in each state, every coalition ascribes to different combinations of purposive, solidary, and material motivations; and so, there is currently no common approach that staff members supporting these teams share regarding how to activate, motivate, and maintain these entities.

There are also dissimilarities regarding management. Some states, like Massachusetts, Tennessee, and Louisiana, have Ed Trust staff members on the ground who convene state partners. Most, however, are supported remotely from Washington D.C. with occasional site visits by their point-person on staff. Staff members overseeing state work are managed by two people on the Partnerships & Engagement team who would benefit from developing greater alignment about what it means to build a movement through the state strategy; this would be akin to the process that Natasha and I engaged in throughout my residency to cohere around a common vision and clear division of labor with regard to MEEP. To successfully meet its stated mission to build a national movement for educational equity, the Partnerships & Engagement team’s leadership should define the core principles that unite all state advocacy teams and revise its approach to state-level coalition-building in order to create greater alignment across teams, even if each state’s local strategy varies slightly.

Based on social movement theory and my own findings throughout residency, I believe that Ed Trust leadership and state-level staff should address the following questions as they revisit the state strategy:

- *How, specifically, is your coalition building social capital and growing power for historically underserved communities?*
Anyon (2009) clearly states that the end goal of a social movement, and certainly the end goal of education organizing, is to return power to historically underserved communities. There needs to be a clear plan for how this will get done.

- *What will you do to build psychological safety within your coalition?*

Garvin et al. (2008) help us understand how critical psychological safety is for the process of teaming, for it provides participants the security and courage necessary to engage fully, express ideas, and bounce back from mistakes. Through my residency supporting the Massachusetts Education Equity Partnership, I learned that psychological safety is created with care and intentionality. Coalitions must be prepared to identify specific interventions they will apply to surface differences and bring people together.

With MEEP, we modeled vulnerability, invited partner feedback regularly through surveys, focus groups, and informal conversations. We normalized respectful debates at monthly meetings and engaged in exercises like asset-mapping to build communication, transparency, and trust. These actions allowed members of MEEP – from founding partners to new entrants – to feel equally able and excited to engage with the group.

- *What specific shifts in the political and social arrangements of your state is your coalition seeking to disrupt, and how?*

Social movements, by definition, are disruptive. They seek to transform existing political structures. In many ways, Ed Trust has always challenged the status quo by advocating for data disaggregation, for example, and pushing institutions at all levels to center the needs of underserved students and families. In some states, there is already evidence that Ed Trust-supported equity coalitions have impacted who holds power in the state and who sits at decision-making tables.
And yet, as the organization seeks to build a movement through its state strategy, it will need to critically reflect on how it can leverage its influence to further subvert power structures. That will require considering who the organization partners with and whose voices are centered in its advocacy. These shifts are not without risk – they might threaten some longstanding relationships that Ed Trust has and may temporarily undermine the organization’s ability to score concrete policy wins. Building a long-lasting, deeply impactful movement, however, will require state coalitions to identify specific political and social arrangements that they aim to shift, and then work with the national team to strategize an approach that maximizes coalitions’ chances of succeeding.

If we apply O’Reilly and Tushman’s (2011) concept of organizational ambidexterity to The Education Trust as a whole, we see that Ed Trust’s state strategy is an “explore” activity – an area where the organization seeks to innovate – and its ongoing federal work represents the “exploit” arm of traditional advocacy for the organization. As a result, the national team and state actors will need to work harder to create a common identity about how advocacy is carried out and align on matters of tactics:

- What level and kind of disruption does the organization feel comfortable supporting given Ed Trust’s reputation and existing relationships?
- To what extent can and should national leadership advise state actors and/or intervene on matters of strategy at the local level?

The answer to these questions will be important as the organization continues building towards a coherent nationwide movement through its state teams.

- *How do you plan to develop your advocates’ leadership?*
As was established by Hahrie Han (2014), effective civic associations are able to both organize its members and mobilize them. Over the years, Ed Trust has proven that it can mobilize both people and ideas; however, Ed Trust lacks experience organizing advocates and strategically developing their capacity. One intervention that has proven effective in the last year are the Partnerships & Engagement team’s “equity boot camps,” which invite advocates from states where we are active to come together for professional development over the course of two or three days.

While these boot camps provide great opportunities for knowledge-sharing for state teams, it is unclear how well each individual state manager or director is able to regularly support their partners in this way back in their home states, especially considering that the majority are managing these coalitions remotely. As one of our partners pointed out, “Mobilizing without organizing is empty,” (H.T., Vision & Strategy Retreat, January 24, 2020). Ed Trust should beware of not falling prey to empty mobilizing. Movement-building demands a state strategy that provides state managers and directors with sufficient capacity to be able to develop their advocates’ own ability to carry out the work within the coalition and at their respective home organizations.

- **How will you ensure that your coalition is cross-sector?**

Anyon’s (2009) example of CC9’s advocacy coalition in the South Bronx highlights the importance of diversifying coalitions across sectors in order to maximize impact, ensure solidarity, and anticipate challenges effectively. MEEP’s partner organizations focus on everything from immigration to housing to workforce development to education. I believe this fact has strengthened our advocacy and helped us gain important credibility
in a tough local climate. Ed Trust’s state strategy should explicitly encourage this sort of diversity, which, above all, enables true movement-building.

**Implications for Sector**

There are two core implications for the education sector that my strategic project has made clear: (1) it is significantly more challenging to organize and mobilize people in the 21st century; this requires that school systems think through and plan for family and community engagement in novel ways. This was made clear through the RKA as well as my lived experiences through residency. There are manifold challenges that must be considered nowadays, such as diverse geographies and scale, social polarization across race and class, the absence of a national organizing culture, and our political climate; (2) American educators and education advocates must learn how to “fail well” in order to create room for innovation and growth in our education systems.

**It is significantly more challenging to organize and mobilize people in the 21st century; this requires that school systems think through and plan for family and community engagement in novel ways.** Most school districts across the country claim some form of family and community engagement as a deeply-held value; and yet, most struggle to genuinely and consistently engage families and communities. My research shows that this is not by accident and that this phenomenon is not unique to the education sector (although the stakes for the education sector to “get it right” are particularly high). Often, school districts seek to mobilize families when their input is somehow required, as is the case for Massachusetts districts to receive funding through the Student Opportunity Act this Spring. The problem is that these efforts come in the absence of regularly
organizing those same families, a practice that demands “reciprocity, contact, and support” (Han, 2014, p. 147).

As has been established throughout this capstone, organizing does not happen by happenstance, it requires careful strategic planning. Undergirding this challenge is the fact that the majority of traditional civic associations in the United States no longer exist, as the culture of citizen-led political organizing that was so prevalent since the founding of this country started dissipating in the 1960’s and 1970’s. Changing technologies (mass media, direct mail, the online revolution), the fragmentation and diversification of society, and professionalization of movement organizations broke up civic associations organized through churches or labor unions, for example (Han, 2014, p. 19). The absence of these civic associations has atrophied the citizenry’s ability to effectively coalesce and build power for themselves.

The one notable association that remains powerful in the education sector are teachers unions; however, teachers unions do not always reflect the priorities of parents and members of the community. In fact, the gulf between teachers unions and other stakeholders – especially in states like Massachusetts – can be vast. This reality has left school districts at a loss for how exactly to convene families and what institutions to partner with to access their voices.

With this background, school districts can look at family and community engagement – and the challenges that they face when trying to organize families – through a much larger historical frame. This lens might lead to new, innovative approaches that reignite a culture of civic organizing around our schools, which can
directly inform more successful engagement between school systems and the people they serve and, above all, facilitate power-building in underserved communities.

**American educators and education advocates must learn how to “fail well”.**

One of the most salient takeaways from residency and my work with MEEP was confirming that psychological safety is truly at the root of any successful enterprise, and certainly represents a central ingredient of effective coalition-building. As explained in my Analysis, Natasha and I worked diligently to foster an environment where differences were respected and where partners could take risks and speak up without fear. I was conscious of modeling the behaviors we wished to see in our partners and created structures that facilitated sharing and genuine interpersonal engagement and understanding. I hoped to mitigate the “self-protective reflex” that Edmondson claims does not allow individuals to see mistakes as normal and traps people in feelings of shame and blame when they do something “wrong” (Edmondson, 2013, p. 76).

Education organizing and movement-building are iterative processes that demand ingenuity, innovation, and the ability to bounce back quickly and extrapolate lessons from failures. Unfortunately, educators’ relationship to failure is highly fraught. From licensure tests to teacher evaluations, our current American system of education does not forgive failure easily; quite the contrary, anxiety is palpable among educators who fear retribution if they are out of compliance or do not meet a state standard or requirement.

Regrettably, our education system does not reward mistakes, yet Edmondson believes that “any failure resulting from honest effort or thoughtful experimentation is grist for the innovation mill and thus should instead be considered praiseworthy,” (Edmondson, 2013, p. 81). Undeniably, succeeding is always better than failing and we
should certainly always aim for the former, but we also know that failures are inevitable. If our education system – starting with teacher preparation programs – normalized and rewarded what Edmondson (2013) calls “intelligent failures,” there would be sufficient psychological safety in the profession to take risks, innovate, and unlock healthy communication and experimentation between stakeholders.

In the absence of this, ironically, our schools cease to be learning organizations that provide students, teachers, families, and communities the necessary tools to organize effectively. Instead, everyone is concerned about being perceived as inadequate. This will inevitably hamper educators’ ability to fail well on behalf of their students and education advocates’ willingness to fail well on behalf of the constituencies that they fight for.

**Implications for Self**

Through my residency at The Education Trust, I learned a tremendous amount about my leadership, my strengths, and the conditions that enable my best work. When I first joined MEEP in July 2019, I was unsure if the skills I had developed in the instructional realm of the education sector would translate to the policy world. I was wrong to be insecure; instead, I learned several critical lessons about my sources of power that I will hold close as my leadership continues to grow.

**I am an orchestrator.** Julie Battilana and Marissa Kimsey (2017), scholars who focus on institutional change, discussed the three key leadership roles that must be occupied in any successful movement for social change: the agitator who “brings the grievances of specific individuals or groups to the forefront of public awareness”, the innovator who “creates an actionable solution to address these grievances,” and the orchestrator who “coordinates action across groups, organizations, and sectors to scale
the proposed solution,” (Battilana & Kimsey, 2017, para. 3). My time with MEEP confirmed that organizing and orchestrating come naturally to me. I enjoy bringing people together, look forward to the challenge of finding common ground, and am able to foster healthy communication that sustains psychological safety and trust among groups of people.

In the past, I ignored this as a strength even though this ability was critical to my success as a classroom teacher, an instructional coach, and a community organizer. When I started residency, I worried that my relative lack of expertise in education policy would hinder my ability to bring people together. I now realize that my ability to orchestrate has less to do with how many questions I can answer and much more to do with how many questions I can ask. I became “slow to speak and quick to listen” and loved the ability to help partners engage with their power and learn alongside others.

This experience reminded me of what I loved most about teaching middle schoolers a decade ago: building safe and dynamic learning communities where each individual was a valued contributor. A MEEP partner, a black woman in her 30’s who was not very active in the partnership when I arrived, told me in February, “I feel seen and I feel heard now,” (L.B., personal communication, February 11, 2020). Her comment reminded me of something I always told teachers I coached about managing their classrooms, “Remember that kids just want to feel seen.” It turns out this is true for adults as well. I now recognize building relationships and community as a cornerstone of my leadership style. This skill allows me to lead with influence even when I cannot always lead with authority.
I think in terms of systems and strategy. When I enter organizations, I look for the design that informs how decisions get made, how information travels, and how power moves. Again, this is likely due in part to my training as a teacher, an experience that compelled me to think through every classroom procedure and expectation and how each would be communicated to students and eventually owned by them. With MEEP, I was able to identify inefficiencies in how we sought feedback from partners and how we shared information with and between them. I formalized the use of surveys in our advocacy work and internal communication, and also set the foundation for tools partners will be able to use in the future in order to engage more effectively with each other.

I sought alignment between MEEP’s vision, goals, and actions through strategy conversations with the leadership team and new opportunities like the Vision & Strategy Retreat with partners. Because I like to dream big, systems thinking allows me to connect dots and create plans that inspire me and motivate others to act. One area of growth that I need to keep in mind though is following through. I have a tendency to take on a lot and think that everything is possible, so I need to improve how I prioritize objectives and sequence actions so that good ideas do not go to waste due to overwhelm.

Partnership matters. After graduating from college, I joined Teach for America as a corps member and taught middle school ESL Math for three years in Dorchester, an underserved neighborhood in Boston not too far from where I grew up. For those three years I worked alongside Ms. Donley, the ESL cluster’s English teacher, and together, we later agreed, “we created magic”. Co-leading MEEP with Natasha throughout the last ten months was reminiscent of my experience working with Jackie Donley, the first colleague who taught me that partnership matters.
Together, Natasha and I established trust early, shared feedback often and openly, respected and elevated each other’s strengths, respectfully challenged each other when necessary, and maintained constant, transparent communication. Importantly, we also kept the work moving forward, supported each other, and cared deeply about our people. This experience in residency confirmed just how important it is for me as a person and leader to share this collaborative spirit with teammates. It is no surprise that these same attributes trickled down to MEEP and how we all engage as well.

**I center liberation and healing in my work.** At the start of residency, I sought to understand how policy and advocacy work functioned. I held archetypes that led me to believe that this new world I operated in was a figuratively cold one, where the focus was always the end not the means, and where people were less interested in discussions about freedom, identity, and redistribution of power. MEEP meetings felt more like business meetings to me early on and did not provide space for personal stories to emerge or for raw conversations about felt pain in communities and strategies for restoration. Throughout my first several weeks on the team, I felt somewhat alien in my skin and hesitated to enact my role in the way that felt most natural.

As I engaged the leadership team and partners about their life experiences and value systems, I felt increasingly assured that MEEP’s advocacy could and should incorporate liberatory and healing practices often adopted by community organizers, such as asset-mapping, team building, and after-action reviews. In meetings with funders or leaders in the state, I adopted language about “historically excluded” and “historically included” groups at MEEP’s table and talked openly about MEEP’s goal to return power to families and advocates in underserved communities.
In meetings with prospective partners, especially leaders of color, I underscored that our purpose was rooted in community uplift and a desire to interrupt generational educational disenfranchisement. And, I worked with Natasha to ensure we practiced equity inside the coalition and applied a liberatory lens when deciding which organizations to recruit, which partners to elevate as spokespeople, and which strategies to use in pursuit of our advocacy goals.

During a conversation with Ed Trust President & CEO John B. King, Jr., I asked him how he envisions success for state advocacy coalitions that the organization supports. He responded that in 15 years we should be able to see a shift in power on the ground as well as a shift in representation from school district offices to the State Legislature (John B. King, Jr., personal communication, January 29, 2020). It was clear to me in this moment that I formed part of an organization that shared my values. In identifying my personal sources of power, I am encouraged about my future as a leader in education advocacy, working to ensure that these power shifts occur and contributing to the kind of inclusive, equity-focused movement-building that this moment in time demands, both in Massachusetts and in our country.

Conclusion

As the United States finds itself at a social and political crossroads, there is a role for educators and advocates to play in mitigating the deep hurt felt by so many Americans. Movement-building has emerged as an antidote to widespread despair and disenfranchisement, as people are coalescing and demanding justice at local, state, and national levels. Although Massachusetts has not experienced a movement for educational equity in the modern era, the conditions are in place to bring that possibility to fruition.
Since 2015, The Education Trust supported state-level advocacy through equity coalitions like the Massachusetts Education Equity Partnership, which launched Fall 2018. By 2019, Ed Trust placed a bet on the ability to build a movement for educational equity across the country through its state strategy. Mirroring this as a priority, MEEP committed to changing narratives of exceptionalism in Massachusetts and fighting for equitable education policies so that in turn the partnership could galvanize a statewide movement for educational equity. As a resident, I was charged with strategically growing the partnership, managing partnership dynamics and relationships, creating systems of operation that facilitated MEEP’s advocacy, and defining MEEP’s vision and strategy.

This capstone proves that to achieve its ultimate vision, MEEP needs to learn lessons from social movement theory, community organizing, and literature about teaming and organizational ambidexterity. Unlike 1993’s Massachusetts Education Reform Act campaign, the partnership should structure itself as the core of a social movement. The following elements are essential for this core to hold: (1) a hybrid advocacy style that leverages organizing and mobilizing strategies, (2) a sense of psychological safety and team, (3) spadework, or orchestrated small wins, and (4) timely political zeitgeist, or a spirit of the times that enables and informs the movement itself. I argue that all four elements are present or evolving for MEEP, as evidence shows that we are making progress on all components of my theory of action.

As The Education Trust expands its reach in states and deepens its support of equity coalitions like MEEP, the organization will need to consider how deeply it is willing to commit to true movement-building given what we know social movements entail. MEEP will also need to commit to a structure and identity that clearly elevate its
core purpose to build a statewide movement that can unleash unprecedented advocacy for educational equity in the state of Massachusetts.

I learned that my sources of power make me a leader who is well-suited to act in this moment. I can organize people and organizations through empathetic relationships and a healing lens; I can orchestrate connections across race, age, and power; and, I know how to do so strategically and systemically. As the United States and the entire world community grapple with the COVID-19 pandemic and related consequences on all areas of life, it is clear to me that the deep hurt the poet Warsan Shire speaks of in “what they did yesterday afternoon” (Shire, 2015) got deeper. At the same time, as I argued throughout this capstone, people have found respite and hope in community and within coalitions as the clamor for connectedness and mutual aid grow exponentially. As the education sector continues to endure significant challenges, both during this pandemic and post-crisis, education leaders must re-imagine how they connect with and empower historically excluded families and communities in the context of this nation’s current zeitgeist and climate. People power is the balm the country seeks and the protective force our students need. Education advocates are the central actors that can facilitate the movement to reverse social and educational injustice.
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Appendix A

MEEP Fall 2019 Survey Results – Fall 2019

Our Purpose

My organization has been part of MEEP for:

My participation in MEEP has positively contributed to my organization’s advocacy.

Please share 1-2 examples of how your MEEP involvement has enhanced your work.

- We are now more aware of other like-minded groups in the ed/advocacy space and have the opportunity to more engage in Massachusetts-wide work.
- Members of MEEP and the #1 for Some report have educated us about education inequities and its impacts on EL students and students of color and has allowed us to see the school funding debate from a variety of perspectives. This has been important in sharing with our members and making sure we bring a balanced voice
- MEEP is willing to hear and present the viewpoint of bilingual and dual language education programs.
- Strengthened / developed relationships to other organizations in the coalition (Teach Plus, MIRA, MABE, Stand for Children, etc.)
- #1 for Some report gained lots of traction, was widely shared. Glad we could be part of that, have our logo on it, and be able to reference it in our own work.
- Info and intel about chapter 70 proposals, helpful to our budget advocacy strategy for preschool expansion.
- Access to compiled data is incredibly helpful. We are able to take what is relevant and use it to support our advocacy efforts.

- Access to legislators, talking points

- Staying informed on DESE and policy happenings (e.g., MCAS data release, budget bill), Being able to build our external presence by signing on to MEEP "endorsements")

- Participation in MEEP has allowed Amplify Latinx to join other org. leaders to support and advocate for equity funding legislation that was passed this year and allowed us sign on to thoughtful commentary on areas for improvement to the legislations.

- Meeting other advocates / having thought partners

- It's allowed me to make several contacts

- Connecting with engaged stakeholders. Helped my thinking on broader impact of equity work.

- Shared Research

How can MEEP further support your organization’s mission?

- Continue to spend time on the teacher diversity/hiring equity issues facing Mass., and continue to serve as a united front on broader educational/equity issues facing students and families

- By continuing to educate us and in turn our members through research and policy analysis that supports our goals of furthering full integration of immigrant families

- Keep doing what you are doing

- Do something for early childhood at some point, whenever the opportunity arises. Happy to keep thinking of ideas for this. It's been fine so far; relatedly, ensure that MEEP is a true "cradle to career" effort, not just K-12. Think of the opportunity gap in those broader/bolder terms, beyond K-12 schools and policy.

- SOME FUNDING SUPPORT FOR SPECIAL INITIATIVES THAT REQUIRE A LOT OF MEETINGS, TRAVEL, ETC.

- Timely information about education matters at the State House, summaries and talking points

- One thought that came to mind is seeking specialized input from org reps on different content to be shared based on their areas of expertise; e.g., we work with parents, so if the audience for an MCAS deck were parents, we could provide some insight into how this type of info has been absorbed (or not) previously. I don't have any legitimately constructive feedback right now since I just joined!

- Amplify is considering folding our education arm under our leadership representation focus area- we would like to collaborate and get feedback from the MEEP participants on what this might look like and how we as Amplify can best add value to this space. We would also like to determine how to more specifically convene and or amplify the education issues that are pertinent to the Latinx community.

- Finding us more people or leads for our organization

- By showing up to events where parents advocate for change.

- Develop methodology/strategy for impact in postsecondary equity advocacy.

- Further Data Collection

The Partnership
What can MEEP do to foster more collaboration between partners?

- I'm not sure the entirety of the MEEP organizations off-hand (I believe it is listed somewhere) but knowing who does what where would be helpful from our end. We know that many groups are Boston-centric, but some have work or ties to W. Mass, as well, making collaboration easier.
- More learning about one another's organizations other than introductions
- Continue to find issues that intentionally help us interact with each other
- Not sure yet. Keep providing the platform (meetings / emails) and relationships b/w partners should continue to flourish organically.
- The leadership staff is doing a fine job keeping everyone informed and arranging key meetings to further advance our advocacy.
- Continue to allow space for us to share things that are coming up for organizations involved.
- Host briefings for partners on education issues in the state related to equity
- I'd be interested in spending more time with the group informally, but that's likely mostly a function of my being new, living in Boston, and having no kids... You may already do this but recommending individuals to each other for advice/insight/thought partnership based on areas of expertise since you know a little (or a lot!) about each of us
- Provide opportunities for smaller meetings where perhaps 1 partner can be featured to show what they are working on etc. Allow for more 1:1 or small social gatherings.
- spotlight the work an organization is doing
- smaller group breakouts between monthly meetings
- Add a 10 min section to monthly meetings for brief profile on each org. Share out updates/achievements in regular communications. Does MEEP have social? Another opportunity to raise awareness, if not.

**Meetings**

I receive new and/or valuable information in MEEP meetings.
Our current meeting structure gives me the opportunity to have my voice heard.

**Taking action**

I have sufficient opportunity to review document drafts or plans for other actions (press releases, op-eds, testimony, etc.) before action is taken.

My feedback on documents and action plans is valued.
I am able to influence or recommend actions that the partnership takes.

Appendix B
MEEP Focus Group SWOT Analysis – November 2019

Strengths:

- MEEP equips partners with tools to be effective advocates. “I had the passion but not the formula”—while the partners add capacity to MEEP, MEEP also adds capacity to its partner organizations. i.e. advocacy skill development
- DATA. MEEP (and Ed Trust) helps partners in using data and how to have data conversations. “How do you discuss data in the most poignant way”
- Diversity of the group and diversity of thought
- Everyone buys in on the equity vision
- Expertise: Ed Trust staying on top of things and policy expertise
- State environment—the abundance of groups doing this work creates the state atmosphere that ready to do this work.
- Strong legislative relationships (partners have relationships)
- Meeting in the middle: We work upward while also supporting the work on the ground
- Strength in numbers
- Potential for growth
- Willingness to act
Open and positive communication with partners

Weaknesses:

- Natasha is most of the “policy expertise”. How do we spread that and create sustainability?
- How do you create a unique niche in such a saturated market?
- We don’t have partnership brand recognition – do the right people know who we are? And if they do, is it that they know MEEP or Ed Trust?
- When MEEP was working on No. 1 for Some, there was clear focus. Now, things are more abstract.
- What is MEEP’s core? What are the core issues/causes of the group? What is the “north star”?
- Lack of structure (easily fixed). What are the assets that every organization is bringing? i.e. if we are working on X, we need to know what each partner contributes to that work (experience and expertise base). Then, say “what do we need” and then strategically build coalition. (Natasha and Mariel are aware of what other partners can contribute, but partners aren’t)
- Time and space to rethink goals. Retreat annually??
- Communication: How to we streamline the sharing out of what other organizations have going on in their worlds
- Lack of definition on what we do. What does it mean to be a member of MEEP? What does membership require? And how do we communicate to our organizations what they expectations are for our organizations?
- Diversity of thought— what happens when we don’t agree on something?
- More central and western MASS representation
- More AAPI representation. We need to expand how we think of immigrants.
- Email list: What is active membership look like on both sides (entering and leaving the org)
- Having members that are educators and are working in the districts

Opportunities:

- GROWTH
- Parent involvement and student involvement
- The upcoming election year
- Invest in local lobbying
- National conversation: People are talking about race in ways that they aren’t talking about before.
- Website
- Creating a steering committee or a small leadership team beyond Mariel and Natasha
● Simplify issues and making them accessible to multiple audiences so that they themselves can advocate for change
● A dual approach. Impacting policy and what’s on the ground
● Since the funding battle is relatively over, we have time to think through our partnership
● Identification of assets (partners and what they contribute): Drawing from everyone’s expertise and places of intersectionality
● Teaching people on the ground how to be advocates (2-day institute).
● Commissioner Jeff Riley

Threats:

● Corporate involvement. We have to be careful that one group doesn’t dominate the conversation and MEEP being labeled as privatized.
● Big urban bias: We can have race talks in urban districts but moving outward is more difficult
● Union and School Board involvement
● Derailing meetings because of personal agendas
● The DESE/MA number 1 narratives
● Labels: People labeling us can hinder us and we cannot be seen as protecting certain group’s interests

Appendix C
Massachusetts Education Equity Partnership: 2020 Priorities – December 2019

Vision & Mission

● Explicitly incorporate a “cradle to career” component in MEEP’s what we do/overarching goals (call out ECE)
● Clarify our “north star” - what change we aim to make in MA over time
● Establish a core/steering committee / time-limited working groups
  ○ Ask for volunteers who like to think about what this could be, mix of people who have entered the org at different points = let’s do a retreat
● Develop a values statement
● Underrepresented partners within MEEP: student groups, AAPI communities, direct service providers

Organizational Structures & Systems

● Create and provide an online MEEP Partner Guidebook that:
o Outlines what it means to be a MEEP partner (expectations and responsibilities) vs. other types of affiliations with MEEP

o Distinguishes between different tiers of partnership: partners, members, advisors, affiliates, etc.

o Details procedures that partners can expect (monthly meetings, sign-on requests and processes, op-ed and testimony opportunities)

o Shares ways that partners can engage with each other off email (app platforms, social media, annual events like “boot camps” or a MEEP retreat)

o Reviews key actions MEEP has taken as part of its advocacy campaigns (origin story, share institutional story)

o Clarifies how people onboard and also how they exit the partnership

o Lists all active partners, members, and organizations (email addresses, website links, and ‘organizational strengths’)

- Streamline sign-on process for shared action: google form
- Move from individual emails to a mailing list
- Rotate meeting and event locations to include communities beyond Boston
- Engage in an annual retreat that focuses on: refining vision, partner skill development, team building, strategic planning, internal asset mapping

Partner Engagement & Collaboration

- Deepen partner-partner relationships and communications
  o Secure platform for partners to easily engage with each other off-email (Mobilize, Slack, GroupMe, private page with login on MEEP website) and share upcoming events, opportunities, job vacancies, etc.
  
  o Reserve dedicated time in monthly meetings for partners to present on a topic of interest or a dilemma they are facing in their work (e.g. Titus re: ECE basics, integration/segregation in MA; Lisa re: racial trauma and healing; Edith re: history of activism in Boston’s communities of color; Margalit re: issues impacting immigrant communities currently; Lorena re: results from the Latino Educator Survey, etc.)
  
  o Optional social gatherings quarterly in different communities across MA
- Engage in an annual retreat that focuses on: refining vision, partner skill development, team building, strategic planning, internal asset mapping
- Differentiate partner support
  - Offer unique opportunities for established leaders, younger leaders, leaders of color, etc.

**Professional Development & Capacity Building**
- Systematically plan for development of target knowledge and skills
  - Invite relevant guest speakers to MEEP meetings every other month (e.g. Ventura/Shay who visited and presented from DESE)
  - Offer optional trainings and workshops outside of monthly meetings ( “Blogging 101”, op-ed project work, how to write a compelling testimony, etc.)

**External Presence & Branding**
- Bolster presence on social media (Instagram, Twitter, and Facebook) and on our website
- MEEP 1-pager / key actions printed out in color in a folder with logo (marketing materials)
- Define when the MEEP logo is to be used (swag)
- Establish programming or a specific event/convening that MEEP will be known for within Massachusetts