



Align. Activate. Agitate: Designing a Professional Learning Network for Community and Systems Transformation

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Align. Activate. Agitate:
Designing a Professional Learning Network for Community and Systems Transformation

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

Submitted by
Phoebe Grant-Robinson

To the Harvard Graduate School of Education
In partial fulfillment of the requirements for the degree of
Doctor of Education Leadership.

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“Every living thing belongs to every other living thing. And I can never be what I ought to be until the last living manifestation of life is what it ought to be. For better or for worse, I am tied into the idiom of everything that lives. And if I forget this, I profane God's creation. If I remember it, I come to myself in you and you come to yourself in me.”

-Howard Thurman

Dedication

For my Brothers...

Dwain Snagg

Your smile and kindness warms my heart... our last meal will forever fill my soul.

&

Quincy Warren Grant:

Your last words have been the wind beneath my wings these past three years.

"There is NO plan B, Fee."-QWG

I miss you so much...

For all of the students, families, and communities living at the margins of society,

waiting for systems change...

Acknowledgments

“There hath no temptation taken you but such as is common to man: but God is faithful, who will not suffer you to be tempted above that ye are able; but will with the temptation also make a way to escape, that ye may be able to bear it.”

1 Corinthians 10:13

My Foundation...

My Mother, Dawn Grant

There is no me without you. Your struggles, your sacrifices, and your strength have fueled every step of my success. I honor and carry you in all I do.

My Husband, Troy Robinson

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Thank you for modeling intellectual excellence and quiet strength.

My Mother-in-Law, Violet Robinson

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A Celebrated Community – *My Collective Strength*

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Directors/Coordinators

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Abstract

“Change happens when a vast number of people come together and defend a vision of the future they’d like to see.”

Angela Davis, Civil Rights Leader

The Community Schools strategy is a national reform model with proven results. Yet still, its expansion and sustainability has been hindered for a myriad of reasons, including: lack of awareness, systemic capacity gaps, fragmented implementation, and the lack of supportive legislation and funding. As the United Way of Massachusetts Bay (UWMB), a credible intermediary with a 90-year track record of social impact, joined the movement to expand the Community Schools strategy locally while mobilizing Massachusetts Coalition for Community Schools, the central question was: *What role might they play in supporting learning to ground this school improvement reform strategy across the state?*

This capstone proposes three strategic dispositions for intermediaries — Align, Activate, Agitate — and explores the catalytic power at the intersection of professional learning and networks to transform local practice while creating systems change. Grounded in research on effective networks, professional development, intermediary organizations, Mark Moore’s strategic triangle, and my experience as a principal and school district administrator, I designed the Aligned Regional Competencies (ARC) of Learning and Leadership for Community Schools Professionals, a conceptual blueprint for building a Professional Learning Network (PLN) infrastructure. Aligning with the three stages of Community Schools development the ARC guided the PLN’s sequence, coherence, and learning design. This capstone examines these efforts, including the launch and learning from a PLN pilot, and concludes with implications for my own leadership, UWMB’s role as an intermediary, and the sector at large

Keywords: Professional Learning Network, intermediary, Community Schools strategy, liberatory leadership

Introduction

In 1935, Yasmine Kanaan took up the challenge to make a difference locally when she founded the United Way of Massachusetts Bay (UWMB). Building on 90 years of partnership with community-based organizations, today the organization continues to “Unite People, Unlock Opportunities” across 12 cities in its geographic footprint (Boston, Cambridge, Chelsea, Haverhill, Lawrence, Lowell, Lynn, Malden, Quincy, Revere, Salem, and Taunton). It does so by spreading and connecting resources for community-based nonprofits while also advocating for access to quality early education, reduced homelessness through legislation, and innovative partnerships.

Many residents in cities like Chelsea must navigate economic hardships— 20% of the population has debt in collections higher than the state average (United Way of Massachusetts Bay & Merrimack Valley, n.d.). This limits residents’ access to affordable housing, quality education, healthcare, and well-paying jobs, and such financial struggles are often compounded by glaring inequities. According to García and Weiss (2017), educational gaps begin before formal schooling and are closely tied to social and economic inequities. For example, residents in these cities often have limited access to high-quality early childhood education, creating generational disparities across communities served by UWMB. Additionally, with an under-resourced healthcare system, poorer health outcomes are inevitable (United Way of Massachusetts Bay & Merrimack Valley, n.d. ; García & Weiss, 2017).

Pursuing economic prosperity for all people, in 2022 UWMB announced a new community-focused vision amplifying its role as more than a pass-through organization funding other nonprofits across communities in their footprint. This vision centered UWMB’s emphasis on creating a region where access to financial wellbeing is universal and prosperity is shared across races and ethnicities. The organization renewed its commitment to igniting systemic change through five key impact areas, housed in its Community Impact Division: Early Education and Out-of-School

Time, Economic Inclusion and Wealth-Building, Safe and Stable Housing, Youth and Young Adult Pathways, and Community-Centered Crisis Response. Each impact area provides access to prosperity for all people (United Way of Massachusetts Bay, n.d.).

In the midst of myriad mission-driven active projects and initiatives in its portfolio, UWMB received funding from the Lubin Family Foundation in 2023 to advance a shared agenda of a Community Schools strategy across the region. As amended by the Every Student Succeeds Act, a Full-Service Community School refers to a public elementary school or secondary school that: “(A) participates in a community-based effort to coordinate and integrate educational, developmental, family, health, and other comprehensive services through community-based organizations and public and private partnerships; and “(B) provides access to such services in school to students, families, and the community, such as access during the school year (including before- and after-school hours and weekends), as well as during the summer” (U.S. Department of Education, 2015, pp 222-231).

The movement started with Boston’s New School for Children, presumed to be among the nation’s first Community Schools (Blumenthal, 1969). Through the bold and persistent leadership of a group of parents who believed that children in poverty are capable of learning, the New School for Children opened in 1966. The school’s goal was to be an independent school for impoverished students and “truly public-responsive to the public it serves” (Northeastern University Libraries 2015, para. 2). Decades after the New School for Children opened, there were multiple schools centering the practice of a “whole-child” approach, responsive to the needs of students and families. Intrigued by firsthand accounts of families’ benefits from wraparound services, out-of-school programming, and integrated partnerships, in 2013 Jessica Tang, Boston Teachers Union President, organized community partners including the YMCA, Black Ministerial Alliance, and Boston Education Justice Alliance to expand and sustain the model locally (Tang, 2022).

Today, in collaboration with organizations like the Boston Teachers Union and Massachusetts Education Justice Alliance, UWMB has two objectives: 1) increase the number of Community School districts, and 2) mobilize a state coalition for Community Schools. While UWMB's current focus on advancing the Community Schools strategy rests within the Early Education and Out-of-School Time key impact area, the strategy requires local inter-agency collaboration and continues to be a national effort to allay the impact of poverty on children and families in the PK–12 education system.

Considering the leadership modeled by the United Way Worldwide's declaration of Community Schools as a cross-cutting strategy (see Figure 1), UWMB is well-positioned to also leverage Community Schools as an improvement strategy across all key impact areas, creating an internally systematic approach to tackle social issues and marshal resources where needed to realize its mission.

Figure 1

United Way Worldwide Website Landing Page



Note. United Way Worldwide <https://equity.unitedway.org/strategy-guide/childhood/cross-cutting-strategies%E2%80%93community-schools>, 2025.

Scaling this approach regionally and concurrently mobilizing a statewide coalition cannot rest solely on one *impact area*, department, organization, or sector. To achieve meaningful progress, UWMB's Community Schools agenda requires synchronized efforts across its Divisions and key impact areas as well as alignment with cross-sector partners to improve economic, educational, and health outcomes for all students and families.

Problem of Practice

Based on my initial assessment during the first two months at the organization, UWMB has a layered problem of practice, which includes raising awareness of the Community Schools strategy while building leadership capacity amid regional expansion and mobilization of a statewide coalition. As I sat in meetings during my first few weeks at UWMB, a term I often heard was “intermediary.” Funders, UWMB staff, and partners frequently referenced the organization as an intermediary. However, the term remained in question and seemed to have different meanings depending on the user and the context of application. Zooming into the Community Schools movement, which is under the auspices of UWMB's Community Impact Division, it became clear that the organization was on a journey to define its role as an intermediary. *What exactly did it mean for this non-profit to hold this role? What would be required of the organization, and what could it expect from its partners?*

The Community Schools strategy constitutes an integrated system of partnerships between the school and other community resources, operating in lockstep towards academic improvement, social–emotional wellbeing, and financial wellbeing of students, youth, families, and all community members. In this strategy, schools become social centers with open access for all, fostering practices

that improve student outcomes while developing stronger families and healthier communities in tandem. There are four basic components and six pillars of practice endemic to the Community Schools strategy.

Components

1. A Community School Director (CSD)/Community School Coordinator (CSC) who functions as the chief problem-solving officer.
2. A deep and intentional collaboration with stakeholders to clarify their vision for their school.
3. Ongoing engagement in grassroots problem-solving that is responsive to needs of the school and the community.
4. A collaborative structure to coordinate community partnerships and constituency engagement that is responsive to the school context.

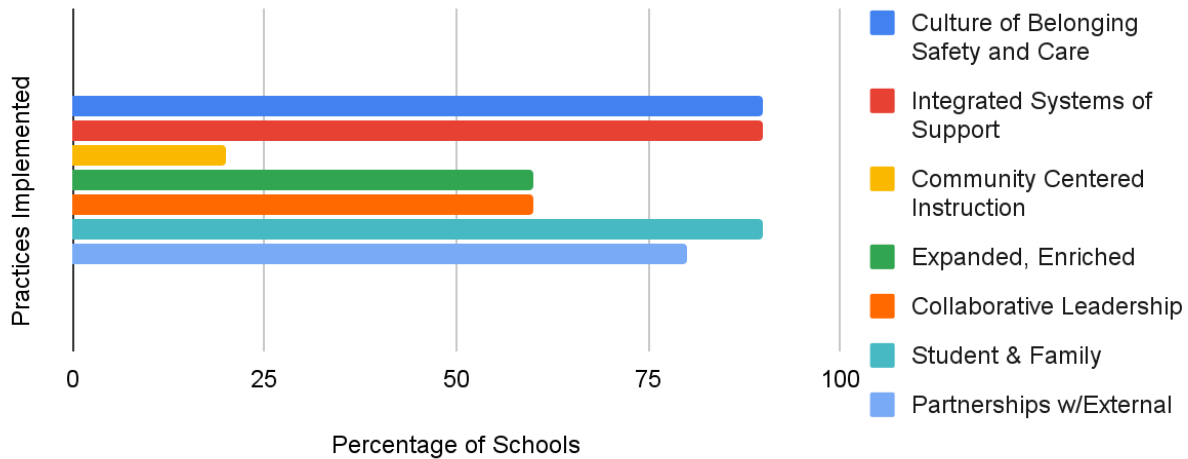
Pillars of Practice

1. Powerful student and family engagement.
2. Collaborative leadership and shared power and voice.
3. Expanded and enriched learning opportunities.
4. Rigorous community-connected classroom instruction.
5. Culture of belonging, safety, and care.
6. Integrated systems of support.

To establish baseline understanding of the awareness, presence, and practice of the Community Schools strategy in our region, UWMB administered a preliminary survey in spring 2024. This survey gauged the extent to which 18 school districts were implementing any of the six Community School key practices. Survey findings suggest that many school districts self-identify as implementers of Community School practices yet have low rates of community-centered instruction, expanded learning, and collaborative leadership, as illustrated in Figure 2.

Figure 2

Preliminary Survey Gauging Community Schools Practices



Note. Preliminary survey gauging implementation and prevalence of Community School practices across school districts in Massachusetts.

While the survey reflected multiple districts, currently five cities in the region demonstrate the four components of the Community Schools strategy, thereby formally distinguished as five Community Schools districts: Boston, Haverhill, Lowell, Lynn, and Salem Public Schools. To date, Massachusetts currently houses 25 Community School Directors (CSDs/CSCs) who have expressed interest and need for more coordinated support and structured opportunities to connect with their colleagues, commenting on the impact of isolation in their role leading to a siloed experience. According to Sarah Link, Senior Vice President of Community Impact, “... supporting districts is essential to building a sustainable Community Schools movement” (per our one-on-one check-in and calibration conversation, 8/20/2024). These preliminary data further underscore the need to raise awareness of the Community Schools strategy and build leadership capacity among Community

Schools professionals as UWMB expands the strategy and mobilizes the Massachusetts Coalition for Community Schools.

After a month of engaging in meetings and exploring UWMB's initiatives to create an economically just region, it became clear that the organization prioritizes community voice—a core practice in their process towards organizational and systems change. According to United Way of Massachusetts Bay and Merrimack Valley (2022), the organization defines community voice as providing “the expertise that is lived experience of navigating a particular policy, service, institution, system, or community. It is critical that community voice dominates UW’s understanding to ensure our strategy and actions are equitable and just” (p. 8). As UWMB distilled its role as an intermediary spearheading mobilization of the inaugural Massachusetts Coalition for Community Schools, the problem of practice we faced was two-fold: the need for increased awareness about the Community Schools strategy, and the need to build leadership capacity. Far from endemic to UWMB, these problems are consistent with the social aspect of learning relevant in leading reform and change (Beycioglu & Kondakci, 2021).

Based on initial conversations with internal and external constituents, I identified a trend of overwhelming uncertainty about perceived meaning of the Community Schools strategy, and what staff members hoped the strategy would accomplish. Although the team leading this work at UWMB had already hosted a Community Schools 101 session, my initial conversations pointed to possible disconnect in the messaging or shortfall in the message’s reach. Similar to the previous survey results in Figure 2, the need for increased awareness and understanding of the Community Schools strategy as an evidence-based practice persisted within the organization and externally. The other aspect of the problem of practice was the need to build leadership and capacity of Community Schools professionals.

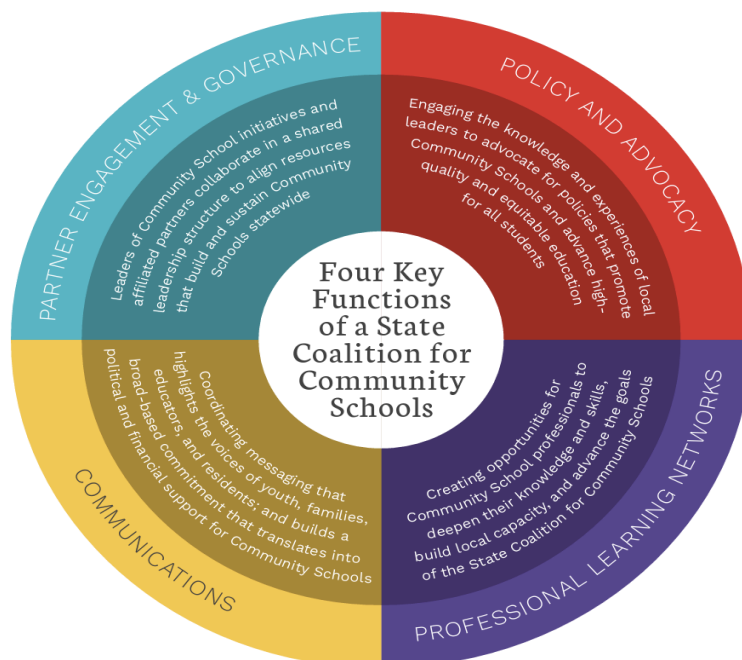
Leveraging my leadership expertise and success as a principal in a large urban district, and district administrator supporting New York City's roll-out of Special Education reform, and considering my goals to advance in nonprofit and systems leadership along with UWMB's Community Schools agenda, my focus on the Professional Learning Network (PLN) function of the Massachusetts Coalition for Community Schools was an ideal impact area. According to the Coalition for Community Schools (2020), there are four key functions of a State Coalition for Community Schools:

- Partner Engagement and Governance
- Policy and Advocacy
- Professional Learning Networks (PLN)
- Communications

As described in Figure 3, the purpose of the PLN is to strengthen the coalition's efforts to advance the Community Schools strategy across the state.

Figure 3

Four Key Functions of a State Coalition for Community Schools



In grappling with the problem of practice, and leveraging the PLN, the central question was:

What role might UWMB play, as intermediary, in supporting learning to ground this school improvement reform strategy across the state?

Note. From the “State Coalition Stages of Development”
by Community Schools Development Copyright 2020.

Personal Connection

I joined Sarah Link, Senior Vice President of Community Impact, and Renée Omolade, Senior Director of Community Schools in June 2024. The opportunity to support UWMB in mobilizing a statewide coalition for Community Schools was personal for me. Prior to beginning my doctoral candidacy at the Harvard Graduate School of Education, I was principal of an elementary school where I led change towards becoming a school with an accountability status of “good standing” with the New York State Education Department. During the initial years of my tenure, we made gains in English Language Arts and math, and our subgroups met their learning targets. While these gains were a triumphant feat in moving from “priority focus” to “good standing,” I was concerned about the sustainability of practices that fostered such remarkable results. The stark reality was that the turnaround accomplishment was served with a penalty of reduced resources. The funding that once fostered provisions for high-quality instruction resulting from job-embedded coaching with experts, tutoring, and many more opportunities for my school community would now be stripped from the school’s budget. How would we maintain momentum? How would we build on our success for the benefit of students and families? How would we address and respond to the often multi-layered needs of students and their families?

My pursuit for solutions, brought me to New York City’s Community Schools grant, and after several years of applying and advocacy, in 2021, we finally became a Community School. In partnership with my CSD, we collaboratively investigated the challenges we were experiencing to identify the root cause and align resources to effectively mitigate the impact of those challenges while carefully maintaining efforts to foster a rich and rigorous academic experience. Reflecting on

the year I served as a Community School professional, I resonated with what was expressed to me at UWMB by Community Schools professionals during one-on-one interviews and surveys. I, too, experienced a lack of community with other Community School principals and directors and found myself truly operating in a silo. Even as I prepared to launch as a Community School, there were no known opportunities to join a statewide professional learning network of Community School professionals.

With this in mind and my personal appreciation for UWMB's multi-pronged Community Schools agenda to increase the number of Community Schools in the region and mobilize a statewide Coalition for Community Schools, here I detail UWMB's journey towards that end as I helped the organization design a Professional Learning Network (PLN) Infrastructure. In the following sections, I begin with a Review of Knowledge for Action, where I present guiding research, concepts, and theories I leveraged to inform my design decisions and leadership moves as I navigated my strategic project. I then introduce my theory of action followed by a description, supporting evidence, and analysis of the strategic project. The final section offers implications informed by insights gained throughout this strategic project.

Review of Knowledge for Action

In consideration of UWMB's next wave of work to advance the Community Schools strategy, I identified three areas of focus relevant not only to the success of the Community Schools strategy, but also to the broad long-term success of the organization's ability to weave efforts across impact areas seamlessly and sustainably, effectuating their mission to create an economically just region for all. These areas are:

- Developing an Aligned Regional Competencies (ARC) model of learning and leadership.
- Establishing a Professional Learning Network (PLN) infrastructure.
- Role clarification and role as an intermediary.

Along with aspects of my professional practice, here I introduce guiding research and theories that informed the decisions and actions shaping my leadership stance throughout this strategic project.

Developing a Model: ARC of Learning and Leadership for Community Schools

Professionals

To create a roadmap for professional learning for Community Schools professionals, I gathered knowledge through research and key learnings from other states that have successfully led large-scale change efforts. For example, in 2010, New York City's Education Department initiated "A Shared Path to Success," also known as the city's Special Education Reform. This shared path was an explicit "commitment to increase educational opportunities and improve outcomes for students with disabilities" (New York City Education Department, 2012).

In a letter to school and district professionals, former Chancellor of New York City's Education Department Dennis Walcott described this shift as "substantial" (Appendix A). As a Children First Network district administrator, I supported a portfolio of more than 30 schools and their communities in rolling out the Special Education Reform. I designed and led workshops

and professional development for a range of school and district-based professionals, along with various community members, parents, and local representatives. At the heart of this work was ensuring that the messaging from myself and my colleagues who led the work was consistent. We were charged with building knowledge, skills, and the capacity of local practitioners, district-based professionals, community members, and all who could impact or were impacted by implementation of the Special Education Reform. New York City successfully led the full implementation of a reform strategy, beginning an initial phase-in with 260 schools in 2010 then expanding to full implementation across its 32 school districts in 2012. Perusing research, I kept returning to a critical question: *What anchored New York City's successful roll-out of such a large-scale change initiative?* This question led me to a new body of work.

In my assessment, the three core principles for leading effective change, identified in Figure 4 — were instrumental in New York City's Special Education reform rollout: communicate, collaborate, and commit (Center for Creative Leadership, 2024).

Figure 4

The 3 Cs of Effective Change Leadership: Communicate, Collaborate, and Commit



While New York City's Special Education Reform followed already approved policy and funding, Massachusetts had yet to attain comparable statewide legislation or earmarked funding in support of the

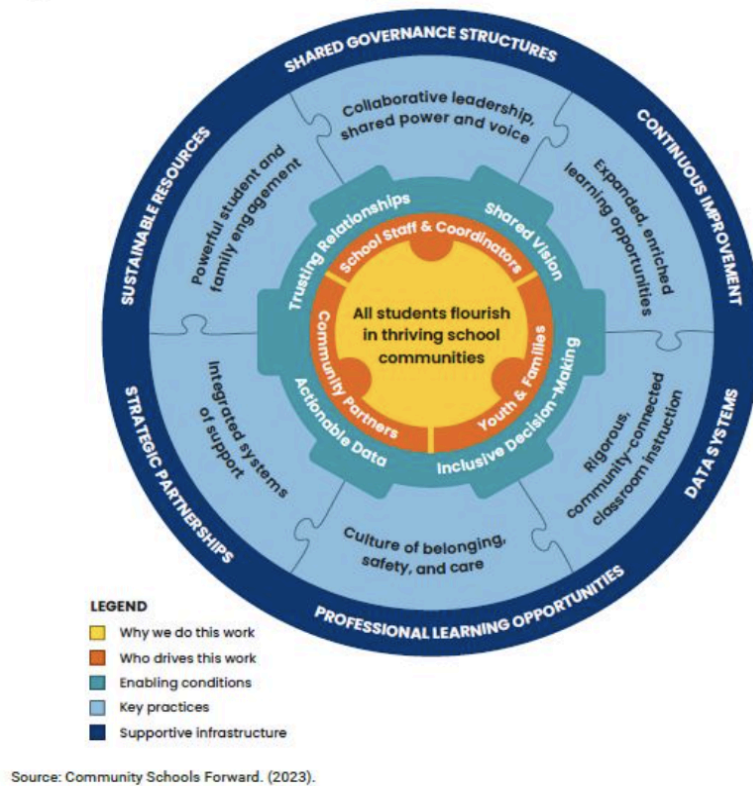
Note. From the “The 3 C’s of Change Leadership: Communicate, Collaborate, Commit” by Center for Creative Leadership Copyright 2025 Center for Creative Leadership.

Community Schools strategy. In this context, the Massachusetts Coalition for Community Schools not only launched a promising strategy but also coalesced a broader movement to enhance local implementation and agitate systemic change through policy and funding. I posit that these principles of communication, collaboration, and commitment will be equally critical to the success of UWMB’s Community Schools agenda .

The objective of the PLN, as articulated in the four key functions framework, is to “create opportunities for Community Schools professionals to deepen their knowledge and skills, build local capacity, and advance the goals of the state Coalition for Community Schools” (Coalition for Community Schools, 2020). This statement presents a dual focus: building local impact through enhanced capacities and advancing a statewide movement to agitate systemic shifts. However, the state coalition’s key stages of development do not currently provide a detailed or sequenced learning path toward a successful Professional Learning Network, thereby, inadvertently jeopardizing both effective implementation and sustainability. Additionally, while the Essentials Framework for Community Schools (Community Schools Forward, 2023) captures the dynamic interplay of the *why* and the *who* of the strategy (see Figure 5), the Community Schools professionals (drivers of this work), would benefit from coherent guidance that illustrates the *how*— a clear learning path that deepens knowledge and skills to build local capacity.

Figure 5

Essentials Framework for Community School Transformation



In considering how to design a professional learning network infrastructure for Community Schools professionals, I drew on insights from Teemant, Sherman, and Tyra, who chronicled the design of and lessons learned across five

Note. From the “Essentials Framework for Community Schools Transformation” by Community Schools Forward Copyright 2023

U.S. National Professional Development grants in 2002–2023 (Teemant et al., 2024). In their research, the authors contend that change is multifaceted, occurring on an individual and institutional level — both requiring ongoing cycles of reflection and action (Teemant et al., 2024). Their concept regarding the multifaceted dynamic of change encompasses a need to reframe habits of mind, behaviors, and practices of individuals, while building the collective capacity at the institutional level to challenge inequities (Teemant et al., 2024). This research offers UWMB and

other nonprofits functioning as intermediaries, a systematic approach to develop a long-term professional learning strategy to foster sustainable change through individual and institutional transformation. This is particularly through reframing thoughts and behaviors. Operating from the premise that the U.S. National Professional Development grants offer long-term insight into how educators learn to support learners, the authors claim that valuable insights into how educators learn to support students is gained particularly through professional development that is successive: driven by assumptions from the field, scaffolds learning, and relies on theories and lessons learned by those applying the new knowledge and skills to solidify and transfer learning. The authors further presume that successful completion of successive professional development can distinguish between incremental and radical pedagogical change. Building on the idea of incremental and radical change, these insights informed my design of an ARC of Learning and Leadership for Community Schools professionals to guide coherent sequence and learning supportive of local and system-wide change.

Another body of work informing my actions and strategy was the *Essential Features of Effective Networks in Education* (Rincón-Gallardo & Fullan, 2016). This research helped expand my thinking about an effective PLN as a “collaboration that: first, deepens the learning and engagement of students and adults; second, enhances the professional capital of teachers and leaders; and third, becomes a positive force of whole system improvement” (p. 5). It was the third feature that answered one of my pressing questions as I examined the intersection of professional learning — structured experiences to expand knowledge and enhance skills — and the network — a group of people or organizations. As Angela Davis asserted, “Change happens when a vast number of people come together and defend a vision of the future they’d like to see” (Laura Flanders & Friends, 2024). With a clear roadmap, communication of that vision is enhanced, collaboration is strengthened, shared commitment is reinforced, and sustainability is nurtured. This is the journey towards systemic transformation.

Establishing Massachusetts Coalition for Community Schools PLN Infrastructure

As UWMB defines its role in the Community Schools movement, it is necessary to consider how its function as an intermediary supports the day-to-day implementation and long-term planning. “The capacity of intermediaries to help build infrastructure and use quality-improvement strategies can help ensure that model programs are implemented with fidelity and good effect leading to sustainable outcomes” (Franks & Bory, 2017, p. 29). Additionally, my attention was drawn to the need for UWMB to socialize its identity as an intermediary as well as remain responsive to context dynamics that could influence their capacity to lead effectively.

To establish a shared understanding of effective action in networks, one must acknowledge that a network — whether a group of directly or indirectly connected people or organizations — becomes effective only as they collaborate coherently towards a shared vision and goal (Rincón-Gallardo & Fullan, 2016). Simply put, core determinants of network effectiveness are their function and inner processes.

Rincón-Gallardo and Fullan (2016) further propose that networks can be understood as collaborations that yield three outcomes — a proposition I’ve extended to codify three strategic dispositions of an intermediary working toward sustainable systems change — *Align, Activate, and Agitate*:

- deepened learning and engagement (***Align***)
- enhanced professional capital of all Community Schools professionals, (***Activate***)
- ultimately a field catalyst for whole-system improvement (***Agitate***)

Additionally, the authors have identified eight essential features of effective networks in education that can be broadly applied to network configurations across multiple contexts: 1) focusing on ambitious student learning outcomes linked to effective pedagogy; 2) developing strong relationships of trust and internal accountability; 3) continuously improving practice and systems through cycles

of collaborative inquiry; 4) using deliberate leadership and skilled facilitation within flat power structures; 5) frequently interacting and learning inwards; 6) connecting outwards to learn from others; 7) forming new partnerships among students, teachers, families, and communities; and 8) securing adequate resources to sustain the work (Rincón-Gallardo & Fullan, 2016, p. 10).

Nonprofit intermediaries like UWMB can leverage these features to inform strategy and design of a PLN infrastructure that inherently fosters collaboration with synchronized emphasis on local problem-solving and whole-system improvement. Further aligning with Teemant et al.'s (2024) concept of successive professional development, which scaffolds learning and creates opportunities for deepening understanding through application, and responding to UWMB's problem of practice, I prioritized developing strong relationships of trust and internal accountability. Through deliberate leadership and skilled facilitation within flat power structures, we will establish Massachusetts Coalition for Community Schools Professional Learning Network infrastructure.. As these eight features do not occur in silos, overlap is expected.

Strategic Role Clarification and Role as an Intermediary

In consideration of UWMB's role as an intermediary, their problem of practice, and the central question I was navigating, Frank and Bory's (2015) research was useful in exploring how UWMB might strategically leverage its role as an intermediary to support a multi-pronged agenda for the Community Schools strategy. According to the authors, intermediaries across the U.S., Canada, Europe, and Australia have endorsed seven key functions and roles: 1) consultation and technical assistance activities; 2) development of best practice models; 3) purveyor of evidence-based practices; 4) quality assurance and continuous quality improvement; 5) outcome evaluation; 6) training, public awareness, and education; and 7) policy and systems development. All of these roles are relevant to the UWMB's overall mission. As highlighted in the following table, I decided to focus on three roles (consultation and technical assistance activities; purveyor of evidence-based practices;

and training, public awareness, and education) that align with trends from initial survey data, the problem of practice, the central question, and UWMB's multi-pronged agenda for the Community Schools strategy. As reflected in Table 1, Frank and Bory further align the seven core intermediary roles with corresponding competencies.

Table 1

Seven Core Intermediary Roles and Corresponding Competencies

Intermediary role	Corresponding Competencies
Consultation and technical assistance activities	Knowledge of best practices, analytical skills, engagement skills, content knowledge, experience working with systems, collaboration and conflict resolution skills, problem solving
Best practice model development	Knowledge of best practices, observational and assessment skills, ability to synthesize complexity, understanding of outcome research and evaluation, benchmarking, understanding of fidelity and fidelity monitoring, ability to operationalize and create practice models, understanding of implementation science
Purveyor of evidence-based practices	Knowledge of best practices, knowledge and skill in implementation science and dissemination, ability to translate research into practice, understanding of fidelity and fidelity monitoring, data collection and synthesis, training experience, engagement skills, experience working with organization's complex systems
Quality assurance and continuous quality improvement	Knowledge and skills developing and implementing quality assurance and continuous quality improvement models; knowledge of quality assistance/quality improvement tools and procedures; skill in data analysis, management, synthesis, and reporting; engagement and consultative skills
Outcome evaluation	Knowledge of research design, development, data collection, and management; statistical knowledge and ability to synthesize data and monitor outcomes; experience with benchmarking and linking outcomes to programmatic and funding goals
Training, public awareness, and education	Experience in training, teaching, and community engagement; context knowledge and mastery of subject matter; communication and public awareness skills

Policy and systems development	Ability to work with complex systems and political environment; ability to translate research and complex material into brief policy statements and recommendations; engagement and collaborative skills; ability to align priorities with political will and available resources
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Note. Adapted from “Strategies for Developing Intermediary organizations: Considerations for Practice” by Franks, R.P., & Bory, C.T. (2018). Families in Society: The Journal of Contemporary Social Services, 98(1): p. 32 (<https://doi.org/10.1606/1044-3894.2017.6>). Copyright 2017 by Alliance for Strong Families and Communities.

Along with these core roles and corresponding competencies, Frank and Bory (2015) reinforce the need for intermediaries to be aware of the potential impact of contextual factors as barriers or facilitators to the effectiveness of their work. The authors identify seven contextual factors to begin distilling potential facilitators and barriers to UWMB’s role as an intermediary: 1) collaboration and competition, 2) system capacities, 3) funding and resources, 4) need, 5) policies, 6) history, and 7) political climate (Frank and Bory, 2015). In continued exploration of the impact of contextual factors, I examined Mark Moore’s concept of public value and the accompanying strategic triangle to better understand the dynamic relationship of UWMB’s facilitators and barriers with their respective ability to bolster or block efforts to achieve their overarching mission, “to advance an economically just region where prosperity is shared across race and ethnicity” (United Way of Massachusetts Bay, n.d.).

Moore defines public value as a concept that directs one’s focus to conditions in the world that they would be interested in improving, whether at the individual, aggregate, or social level (Harvard Kennedy School Executive Education, 2019). While it is important to think about creating

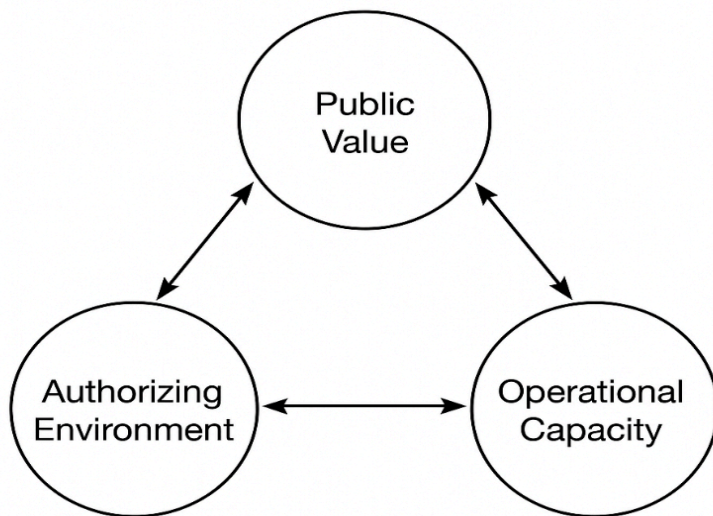
public value, Moore contends that it is also critical to consider the necessary “*how*”, to produce the desired improvements.

Material resources and their deployment

Moore further introduces the strategic triangle (see Figure 6) to illustrate the “*how*” and the dynamic relationship between desired outcomes (public value), required materials or mechanical processes (resources/operational capacities), and mobilization or marshaling of assets (authorizing environment/ legitimacy and support), to successfully accomplish the conditions hoped to change (Harvard Kennedy School Executive Education, 2019).

Figure 6

Mark Moore’s Strategic Triangle



With nearly 30 years as an educator actively bridging allies, facilitating opportunities to build capacity, and braiding funds to expand access to all constituencies in my school community, I quickly recognized that UWMB was indeed more than a “pass-through.”

Note. Adapted from “Recognizing Public Value” by M. H. Moore,

Harvard University Press, p. 103. Copyright 2013 by Harvard University Press.

But this realm in the PK–12 American Education Ecosystem (Scott, 2020) was a new context for me. I, too, needed to bridge the gap in my understanding of possible functions nonprofits could embody as intermediaries and the significance of that role specifically for UWMB as it spearheaded the Community Schools strategy while embracing a new strategic vision towards an economically just region, hoped to be realized through their key impact areas.

Applying Moore’s lens, the strategic triangle further suggests that the success of UWMB’s public value (its mission) depends on its ability to navigate contextual factors (Frank & Bory, 2017) — aligning with Moore’s supposition of operational and authorizing environments. Applying the strategic triangle as a framework for UWMB’s mission, the PLN infrastructure constitutes the “how.” Offering normed, structured, relevant, and consistent learning for Community Schools professionals, the PLN infrastructure is a path to change conditions. However, as UWMB advances towards a formalized statewide coalition representative of various agencies, funders, and their respective priorities, I am curious about the contextual factors that may be facilitators or barriers.

According to Lopez et al. (2005), UWMB’s challenge in clarifying its role as an intermediary could be a large-scale sector phenomenon. While intermediaries may engage in a wide range of activities and functions, Franks and Bory (2017) assert that there has been increased development of evidence-based practices and programs, but a significant gap remains between research and practice. Encouragingly, intermediaries can help bridge the gap by supporting successful implementation of evidence-based practices and building the capacity to sustain those practices with fidelity. However, guidance on how to develop and sustain intermediary organizations remains scarce and elusive (Franks & Bory, 2017).

Synthesizing the full scope of my Review of Knowledge for Action, leadership experience, contextual understanding, and the central question of what role UWMB might play as an intermediary to support statewide learning that drives and sustains the Community Schools strategy

statewide, I developed a theory of action informed by three strategic dispositions that I conceptualized through this process: *Align*, *Activate*, and *Agitate*. Defined below, these dispositions represent my thinking about the deliberate posture that effective intermediaries must embody to facilitate transformational systems change.

Three Strategic Dispositions:

- **Align:** To build shared understanding, values, and commitment by shifting how people think and work together. This means replacing deficit mindsets, building trust, and helping individuals connect their purpose to a bigger vision. Real change starts with how people see and relate to one another.
- **Activate:** To grow and use the skills, knowledge, and structures needed for strong implementation. This happens through intentional changes in how people teach, lead, and work together—grounded in reflection and culturally responsive practice that supports lasting impact.
- **Agitate:** To rally for change by questioning the status quo and addressing inequities. Agitation happens when people and institutions take bold action, using their roles and relationships to shift policy, practice, and power toward greater equity.

Understanding that these three strategic dispositions are not siloed efforts, Table 2 presents a crosswalk that maps their intersections with Mark Moore’s Strategic Triangle; Rincón-Gallardo & Fullan’s (2016) *Essential Features of Effective Networks in Education*, Frank & Bory’s (2015) intermediary roles and competencies, and the transformational lens offered by Teemant et al. (2024). Each disposition represents a core stance that enables intermediaries to drive sustainable and scalable transformation. The emphasis on reframing beliefs and behaviors highlights that transformational

change must be cultivated from within both individuals and institutions in tandem —making the change process deeply human, reflective, rooted in liberatory practices and dynamic.

Table 2

Three Strategic Dispositions for Intermediaries: A Crosswalk of Conceptual Frameworks

Three Strategic Dispositions for Intermediaries	Description & Strategic Triangle Alignment (Mark Moore 2013)	Driving Impact (Rincon-Gallardo & Fullan 2016)	Intermediary Function (Frank & Bory, 2017)	Key Competencies (Frank & Bory, 2017)	Transformational Lens (Teemant et al. (2024))
Align	Aligning networks and constituency groups toward a shared vision (Legitimacy and Support)	Deepened learning and engagement	Consultation and technical assistance, Training, public awareness, and education	Engagement skills, content knowledge, collaboration, communication, public awareness	Reframing beliefs to cultivate shared values and disrupt deficit thinking; a shift toward culturally responsive mindsets
Activate	Activating professional capacity, infrastructure, and implementation readiness (Operational Capacity)	Enhanced professional capital	Best practice model development, Purveyor of evidence-based practices, Quality assurance and Continuous Quality Improvement	Implementation science, fidelity monitoring, data use, training experience, operationalizing models	Developing intentional habits, pedagogies, and structures that build capacity for liberatory-centered practice

Agitate	Agitating systems and catalyzing transformation toward systemic improvement (Public Value)	Fueled field catalyst for whole-system improvement	Policy and systems development, Outcome evaluation	Policy translation, systems thinking, political navigation, outcome monitoring, collaboration	Leveraging redefined identities and institutional commitments to challenge inequities and scale sustainable reforms
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Theory of Action

Based upon my preliminary assessment of the problem of practice UWMB was facing and the Community Schools agenda they were leading at the time that I joined the organization, I designed the following theory of action to guide my process.

If I...

- Co-develop a strategy that clearly distinguishes UWMB's role as an intermediary supporting local implementation of the Community Schools strategy...
- Co-facilitate codification of Massachusetts Coalition for Community Schools' role as a learning organization and establish a PLN infrastructure, offering structured, relevant, and consistent learning opportunities...
- Develop the state coalition's arc of learning that builds the skills, knowledge, and collaboration capacity of Community Schools professionals...

Then...

- Local districts and lead partners will better understand how to effectively collaborate with UWMB and each other...
- We will cultivate a system of connected Community Schools professionals...

- Community Schools professionals will partake in coherent and relevant professional learning experiences...

So that...

- Community Schools can operate and scale more effectively across the region.
- Community Schools professionals can leverage each other as resources, sharing best practices to enhance the experience for students and families in the region.
- Students and families can benefit from a stronger and more cohesive educational ecosystem.
- Community Schools professionals have the knowledge, skills, and resources to effectively implement a sustainable Community Schools strategy across the region.

Strategic Project

Description

The persistent inequities faced by many communities across UWMB's footprint are deeply rooted in structural and systemic racism disproportionately affecting families living below the poverty line. In Haverhill, the median net worth is \$71,736, 71% lower than the state average; in Lynn, 37% of residents have less than \$2000 in savings (United Way of Massachusetts Bay and Merrimack Valley, n.d.). UWMB's advancement of the Community Schools strategy seeks to mitigate the deleterious consequences of poverty by fostering equitable opportunities for all students and families across its footprint and throughout the state. My project supporting UWMB's development of the PLN infrastructure had four phases:

Phase 1: Explore

Phase 2: Engage

Phase 3: Evaluate and Enhance

Phase 4: Execute

In Table 3, I present an anticipated timeframe for each phase and the corresponding activities for completion.

Table 3

Strategic Project Timeline

Phase	Dates	Activities
Phase 1: Explore	August–October 2024	● Initiate engagement with other intermediaries and state coalitions leading statewide PLNs ● Conduct a needs assessment of all Community Schools professionals and coalition members in our region ● Convene a PLN subcommittee ● Co-develop a governance structure
Phase 2: Engage	November 2024–January 2025	● Define arc of learning ● Determine delivery platforms ● Identify pilot group ● Initiate pilot
Phase 3: Evaluate and Enhance	February–March 2025	● Gather and analyze participant feedback ● Adjust as needed, based on data
Phase 4: Execute	April 2025	● Launch Massachusetts Coalition for Community Schools PLN Summit

Phase 1: Explore (August–October 2024)

This phase included four key action steps:

1. Constituency mapping analysis
2. Introduction/one-on-one conversation invitation email
3. Design questions for community conversations
4. Administer CSD/CSC needs assessment

Phase 1 was designed to be exploratory in gathering preliminary data to inform the direction of my strategic project. The first few months allowed an opportunity to get acquainted with the context, policies, and practice of the organization. Inspired by UWMB's commitment to community voice, I centered that value at the outset of my interactions with constituency groups potentially engaging in or impacted by the Community Schools strategy. I curated a series of one-on-one conversations capturing the voices of staff, external partners affiliated with efforts to establish the coalition, other statewide intermediaries, and nonprofit colleagues who were at various stages of implementing the Community Schools strategy within their context. Investing time with my new colleagues at UWMB reaffirmed the organization's value of a broad commitment to voices, as we aligned efforts across key impact areas to move towards organizational coherence and strategy alignment.

Constituency Mapping Analysis | One-on-One Conversation Invitation

I conducted a constituency mapping analysis to identify and align internal and external constituency groups working directly or indirectly with UWMB on the Community Schools agenda. Thereafter, I sent an email introduction to underscore the organization's expressed value of community voice. I also used that initial correspondence as an opportunity to introduce myself and my current role with UWMB (Appendix B). The email concluded with an invitation to join me for a

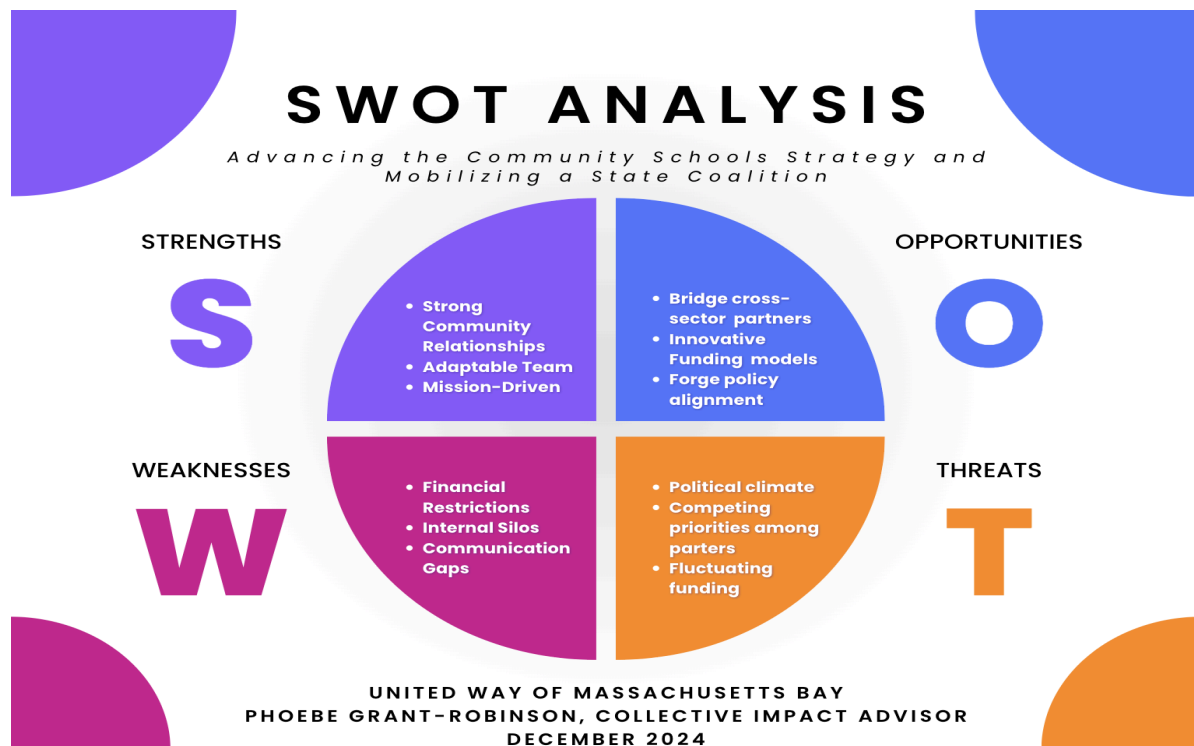
30-minute one-on-one session. These conversations informed future planning as well as mobilization and scaling of the Community Schools strategy.

Designing Questions for Community Conversations

Just how internally ready was UWMB to do this work? I designed and vetted six questions to ask my UWMB colleagues: 1) What is the purpose of education? 2) What is your hope for Community Schools? 3) What strengths of the organization supports this work? 4) Where in the organization might there be needs for improvement? 5) Where might there be possibilities to advance the organization? 6) What currently is or is anticipated to be a unique challenge to the org.? As I investigated the organization's readiness via strengths, weakness, opportunity, and threat (SWOT analysis), these responses served as an entryway into each respondent's mental models and their current understanding of the Community Schools strategy.

Figure 7

SWOT Analysis



Additionally, to help sift through some complexities of navigating the experience working with UWMB, I leveraged the four frames model from Bolman and Deal (2017) as a chisel, refining my questions to shed light on external partners' views relative to the structural, human resource, political, and symbolic frames (Appendix C). During this exploratory phase, perceptions suggested that the PLN might be a duplicative focus (Boston Public Schools was also working with the National Center of Community Schools to support its professional development). Although a deeper analysis follows, it is important to note that the Richard K. Lubin Family Foundation (LFF), UWMB'S sole funder of the Community Schools agenda, raised a critical question: *Who holds responsibility for professional development as the strategy grows statewide—the intermediary, lead partner organization, or district?* This inquiry unveiled broader concerns related to misalignment with the authorizing environment, as well as issues of clarity, coherence, and statewide ownership of the strategy.

Administer Community School Directors (CSDs)/Community School Coordinators (CSCs) Needs Assessment

As conversations were in progress, I also developed a needs assessment to highlight interests, strengths, and self-targeted goals relevant to Community Schools Directors/Community School Coordinators. The assessment was administered to an identified group, who represented a range of 6 weeks–1.5 years of experience in their role. Further examination of a similar survey previously administered to Hub School Coordinators (comparable role to CSDs/CSCs) in Boston identified trends aligning with the six pillars of the Community School strategy. Responsive to the voices of internal and external UWMB constituency, insights from survey responses and chats ultimately shaped my development of the Aligned Regional Competencies (ARC) of Learning and Leadership. The ARC is a conceptual roadmap to foster coherence as it guides the learning trajectory of all Community Schools professionals to grow and sustain the strategy across the state.

Phase 2: Engage (November 2024–January 2025)

This Phase included four key actions:

1. Develop an ARC of Learning and Leadership
2. Identify the pilot group
3. Determine delivery platform
4. Initiate PLN pilot

The purpose of Phase 2 was to engage deeply with research and key constituencies to inform development of structures and processes for initiating a PLN pilot that would cultivate community, capabilities (skills and knowledge), connections (networks), cognition and confidence (Higgins, 2005). These were critical capacity-building levers to advance UWMB's Community Schools agenda.

Develop the ARC of Learning

Even though the Community Schools strategy was not new to Massachusetts, UWMB's mobilization of the state's Coalition for Community Schools was an inaugural endeavor. Our launch in August 2024 included a diverse group of partners such as Alianza, the Alliance of MA YMCA's, the Boston's Teachers Union, Boston University, Educators for Excellence, Haverhill Public Schools, Lynn Public Schools, Massachusetts Education Justice Alliance, Project Hope, and the University of Massachusetts. Identified as a key function of the state Coalition for Community Schools, the Professional Learning Network (PLN) was designed to serve as a conduit for deepening knowledge and skills, and building local capacity of Community Schools professionals, (represented by the aforementioned organizations, and broadly in the education ecosystem), to advance coalition goals. To illuminate the *what* and *how* (operational resources) regarding process and sustainability of the Community Schools strategy, the infrastructure needed to illustrate a coherent learning journey and a clear pathway to collaboratively agitate systemic changes. The latter, I submit, is the key difference

between the PLN as a function of the coalition and locally isolated professional learning or professional development endeavors.

Grounded in local and national research, along with ongoing feedback from Sarah, Renée, Community Schools professionals, and national experts from the Institute for Educational Leadership, National Center for Community Schools, and Ed Redesign, I developed an Aligned Regional Competencies (ARC) of Learning and Leadership for Community Schools Professionals (see Figure 8).

Figure 8

Phoebe Grant-Robinson's ARC of Learning and Leadership Final Version, 2025

ALIGNED REGIONAL COMPETENCIES (ARC) OF LEADERSHIP AND LEARNING FOR COMMUNITY SCHOOLS PROFESSIONALS



Note: The ARC is a developmental roadmap designed to guide Community Schools professionals from core understanding to high-quality implementation. It bridges knowledge, skills, leadership, and foundational competencies across three stages of growth to implement and support sustainable systems change.

Adapted from Community Schools Forward: Stages of Development (2023) and Community School Director: Essential Skills and Competencies (Children's Aid, 2020).

My journey to the final version for this strategic project can be seen through numerous iterations (Appendix D). The ARC organizes the professional learning trajectory around three stages of Community School development: emergent, maturing, and transformational (National Center for Community Schools, 2020). Additionally, it serves as a foundational statewide resource for coherence, sustainability, and liberatory leadership.

Identify the Pilot Group | Determine Delivery Platform

Recognizing that Community Schools professionals include a range of individuals in various roles, including those operating in local school districts, schools, state education agencies, community-based organizations, and advocacy groups, it was necessary to determine an affinity group of professionals to launch the PLN pilot. In consultation with the team (Sarah and Renée), I identified CSDs/CSCs as the logical starting point given their direct on-the-ground leadership and the time constraints of my project. To engage this network, I leveraged the ARC to develop a corresponding learning plan with a cycle of structured, relevant, and consistent in-person learning experiences to foster cross-district connections for CSDs/CSCs (Appendix E).

Once the affinity group was determined, I developed a bank of 19 questions reflecting four pillars of the Community Schools strategy. I also identified a purpose for each question and an accompanying impact measure (Appendix F) to further test the relevance of each question. The team then collaboratively selected 10 questions (see Table 4) to gain a comprehensive view of perceptions of respondents' readiness to engage as a leader, their level of understanding, and their professional needs.

Table 4

PLN _CSD/C's Areas of Inquiry and Finalized Survey Questions

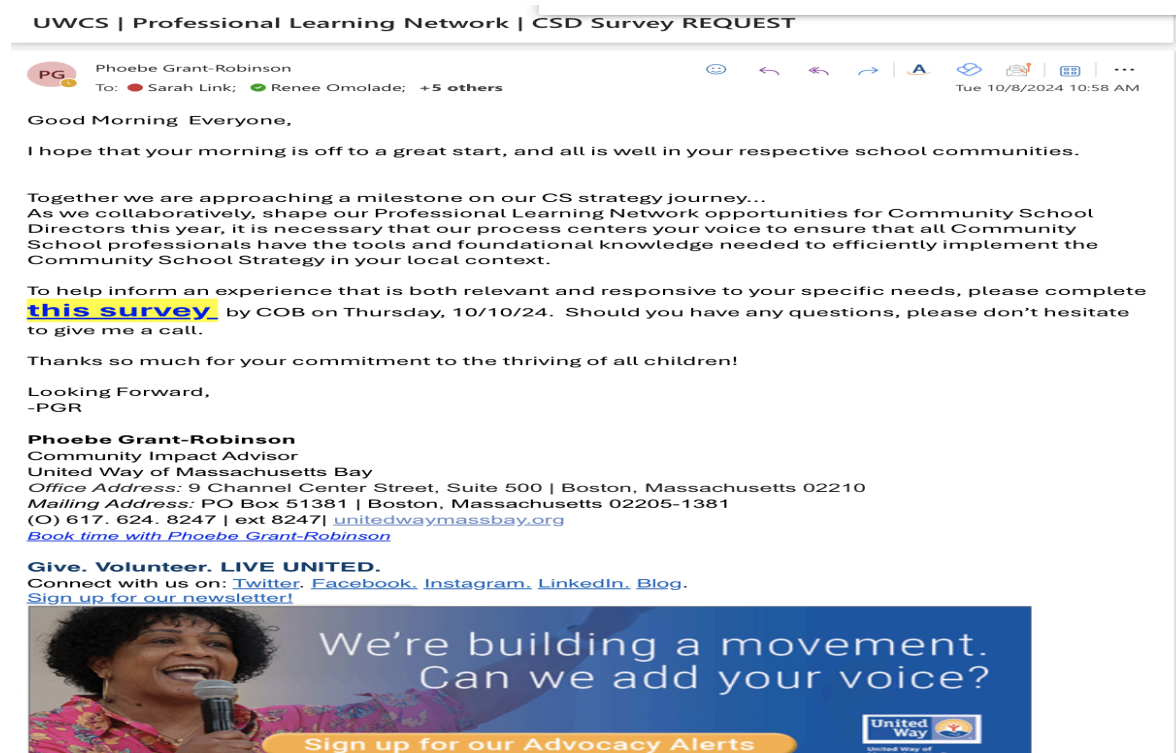
1. To what extent do you feel equipped to recruit and convene community partners that align with school goals?	2. How familiar are you with the Dual Capacity-Building Framework?
--	--

3. What areas do you feel you need further development or training in to be more effective in your role as a CSD?	4. Based on your current level of understanding, how would you describe the core principles of the Community School strategy?
5. How comfortable are you using data-driven inquiry and continuous improvement practices to support school outcomes?	6. How familiar are you with facilitative leadership practices?
7. How familiar are you with restorative practices and culture-climate teams?	8. How familiar are you with liberatory design practices?
9. How important do you believe collaboration with other CSDs is for your success in this role?	10. How interested are you in receiving continued professional development or coaching to enhance your skills in leading a Community School?

After emailing (see Figure 9) CSDs/CSCs requesting their completion prior to the launch of our PLN convening on October 14, 2024, I received 100% completion.

Figure 9

PLN_CSD/Cs Pre-Launch Survey Request



Initiate Pilot

Our in-person PLN pilot launched in October 2024. The cohort included four CSDs/CSCs representatives of Haverhill and Lynn Public School Districts. While all had several years of experience in education, their time in the current role as directors and coordinators ranged from 6 weeks–1.5 years. As such, they were all entering the “emerging” stage of the ARC of Learning and Leadership. I designed an agenda that reviewed our Community Schools strategy mission, the essentials framework, and the role of CSDs/CSCs. Informed by liberatory practices and the process conditions of the Dual Capacity-Building Framework (Mapp & Bergman, 2019), we grounded our learning community in transferable relational practices that would shape collaborative engagement in the CSDs/CSCs’ respective contexts. Centering our humanity, these practices included a community-building exercise focused on participants’ “why” stories. This design opened space to build relationships and connections that might not have happened organically due to them being in different districts and having no other opportunity for coming together, outside of this PLN.

In November 2024, I facilitated a cross-state learning experience for two of our newest CSCs attending the Fundamentals Conference hosted by the National Center for Community Schools in New York City. Other regional Community Schools professionals who joined the collaborative learning experience included three Boston Public School District personnel, a principal, and a representative of the Lubin Family Foundation. On a quest to identify capacity-building skills and build leadership among Community Schools professionals, I came across the Essential Skills and Competencies for Community School Coordinators. The document offered 20 skills and six competencies identified by the National Center for Community Schools to support the development of CSDs/CSCs as they strategically coordinate support and relevant services for students and their families. This resource halted guessing about the skills necessary to build knowledge and leadership capacity for a specific group of Community Schools professionals, CSDs/CSCs. Moreover, it helped

advance my project. It offered me an opportunity to pave the foundation of a learning experience to enhance capacities. Leveraging key guiding documents of the Community Schools strategy, I sifted through the skills to determine where on the CSD's/CDC'S learning journey from emerging to transformational they might be introduced (Appendix G). Yet, this does not suggest that exposure to a skill is limited to its initial introduction; rather, these skills are expected to be applicable across the stages of development as relevant to the context and goals of the Community School and their CSD/CSC.

Returning from the Fundamentals Conference, the PLN_CSD pilot meetings in November and December built on the initial format. As reflected in Table 5, each meeting was rooted in a focused competency and skills as we worked towards specific session outcomes. In January we hosted individualized sessions with each CSD/CSC in our pilot. These sessions were designed as mid-year check-ins that supported CSDs/CSCs in the transfer and logging of data collected from their Assets and Opportunities Assessment on a revised data repository platform. On a macro-level, this platform created systemwide efficiency in monitoring and maintaining cross-district alignment in our process. It also provided a birds-eye view of real-time progress for each CSD/CSC.

Table 5

Professional Learning Network (PLN) – Community School Directors/Coordinators (CSDs/CSCs) Cycle 1 Scope and Sequence

Cycle 1 –First Five Sessions			
Date	Focused competency	Focused skills	Session outcomes
October 15, 2024	Building strategic partnerships and cross-district collaboration	- Strengthen communication and relationship-building with diverse constituencies - Lead and participate in	CSDs/CSCs connect and engage in cross-district collaboration; forge a collaborative culture and new professional

		collaborative learning communities	relationships
	Equity-driven leadership for community engagement and family partnership	● Strengthen culturally responsive leadership for diverse communities ● Enhance communication strategies to build trust with families	● CSDs/CSCs depart with new knowledge to enhance their leadership and family engagement practices
November 19, 2024	Equity-driven leadership for community engagement and family partnership	● Apply the dual capacity-building framework to strengthen family and community engagement ● Use liberatory design practices to develop equity-centered decision-making	● Introduce CSDs/CSCs to the dual capacity-building framework and liberatory design practices to enhance their leadership and equity-focused engagement strategies
	Data-driven decisions	● Map strategies, interventions, and supports based on data trends ● Use data dashboards and visualization tools to effectively communicate findings	● CSDs/CSCs depart with deeper understanding of key performance indicators, mapping interventions, and drafting logic models to enhance their data-informed practices
December 19, 2024	Equity-driven leadership and strategic planning	● Embed Dual Capacity-Building process conditions with development goals and performance indicators ● Design data-informed and equity-driven strategies for whole-school impact	● Participants depart with deeper understanding of the Community Schools strategy's six key practices, dual capacity-building process conditions, and liberatory practices by developing performance indicators and goals aligned to their School Improvement Plan
	Leading for	● Analyze School	● CSDs/CSCs will

	continuous improvement	Improvement Plan to determine trends, gaps, and strengths ● Develop local performance indicators that align with community needs	leverage their School Improvement Plan to inform local performance indicators and goal-setting
January 2025	Enhancing leadership effectiveness; capacity-building and professional growth	● Strengthen shared problem-solving practices, procedures, and protocols	● Engage CSDs/CSCs in targeted support and ensure timely updates to revised Assets and Opportunities digital platform
January 21, 2025	Strategic communication	● Develop clear messaging strategies that align with the Community Schools strategy mission and six key practices ● Strengthen storytelling techniques to spotlight the impact of Community Schools	● Establish a streamlined system and process for collecting and sharing Community Schools updates to inform marketing and communications planning
	Strengthening advocacy	● Spotlight best practices ● Strengthen public engagement with the community	● Identify CSDs/CSCs interested in being featured in UWMB's Changemakers series

Phase 3: Evaluate and Enhance (February–March 2025)

This Phase included two key actions:

1. Gather and analyze participant feedback
2. Adjust as needed based on data

Analyze and Adjust

Ongoing formative assessments were used to iterate the ARC of Learning and Leadership, refine the PLN infrastructure, and help clarify UWMB's role as an intermediary. My assessment included a SWOT analysis, and a combination of conversations, interviews, and surveys to collect data from CSDs/CSCs, national experts, UWMB internal staff, and external constituencies impacting the Community Schools strategy.

This approach revealed misconceptions, research–practice misalignment, and growth opportunities. I identified four indicators of impact measures relative to the previously introduced problem of practice. The indicators then became my evaluation objectives as I implemented the key strategies of my project. In an effort to visualize the evaluation objectives realized across the strategies as the strategic project unfolds, the matrix (see Table 6) illustrates alignment of the four evaluation objectives with each strategy (“If” statement).

Table 6

Evaluation Objectives and Key strategies (“If” statements) Alignment Matrix

Problem of practice	
● Raising awareness of the Community Schools strategy ● Building leadership capacity amid regional expansion	
Evaluation Objective	Key Strategy (“If” statement)

	Model ARC of Learning and Leadership	PLN infrastructure	UWMB's strategic role as intermediary
Skill and competency development	Supports skill-building for Community Schools professionals across the three stages of development (emerging, maturing, transformational)	Builds capacity through deepened learning and engagement of Community Schools professionals	Bridges and aligns training with UWMB's overarching mission
Attendance and participation	Relevance to zone of proximal development respective to Community Schools professionals' entry point and context	Ensures relevant content for meaningful engagement	Facilitates diverse, cross-sector, and cross-regional representation across the system
Increased frequency of collaboration and shared resources		Emphasis on building relationships, shared knowledge, and shared resources	Leverage role as convener to connect Community Schools

			professionals and constituency groups
Sustainability	Feasibility to evolve with the needs of Community Schools professionals on their learning continuum	Feasibility to support new regions and policies	Ensure coordinated efforts to strengthen structures for the Community School's regional impact and sustainability

Calibrating numerous one-on-one conversations and meetings, there were consistent requests for more clarity in the expectations of CSDs/CSCs' roles. There was especially a call for clarity around the role in advancing rigorous community-connected classroom instruction and more explicit language emphasizing family engagement and liberatory practices. With this feedback in mind, the first iteration of revisions included two additional competencies with a total of four new skills. In subsequent feedback sessions with two leading experts at the National Center for Community Schools, refinements were considered relevant and useful. Both experts suggested that rather than increasing competencies, I should further explore how I might consolidate the additions made. They gave me permission to further modify the document, so I engaged in another round of iteration (Appendix H).

Although the PLN subcommittee was scheduled to launch during Phase 1, we were unable to advance this goal because of lingering misunderstanding and competing priorities. The Lubin Family Foundation expressed that work being done by the National Center for Community Schools with Boston Public Schools, was similar to my PLN focus (based on our virtual check-in, October

2024). Indeed, there was professional learning occurring on local and state levels. However, the Professional Learning Network (PLN) as a function of the state coalition was focused on professional learning that shifts the system at large. Our work at the state coalition was to synchronize learning, advocacy skills, and competencies among a network of Community Schools professionals to advance the coalition's goals — particularly related to mindsets and preconceived ideas about PLNs as a conduit for systems change.

Phase 4: Execute (April 2025)

At the time of this writing, the PLN summit had not yet launched. However, as I have successfully established the Massachusetts State Coalition for Community Schools PLN subcommittee with monthly meetings, the PLN Summit is expected between late May and mid-June 2025.

Evidence

In my role as Collective Impact Advisor, I recognized an opportunity to address UWMB's challenges through the Professional Learning Network (PLN), one of the key functions of a state coalition for Community Schools. The PLN was designed to “create opportunities for Community Schools professionals to deepen their knowledge and skills, build local capacity, and advance the goals of the State Coalition for Community Schools” (Coalition for Community Schools, 2020, Professional Learning Network Overview section). To address the challenge of increasing awareness while building the leadership capacity of Community Schools professionals, my strategic project was to develop the Massachusetts Coalition for Community Schools PLN infrastructure. This infrastructure would ensure effective local implementation of the Community Schools strategy while shifting public policy and funding to sustain the strategy statewide.

This section describes outputs and outcomes as they were projected to align with the “*If*” (see Table 7) and “*Then*” (see Table 8) statements of my theory of action, which guided my assessment of progress towards specific goals. As anticipated, my theory of action did evolve; thereby becoming clearer and more closely aligned with the context as the project developed. The progress highlighted is in accordance with my revised theory of action.

Revised Theory of Action

IF I...

Develop a model ARC of learning for Community Schools professionals...

AND

Establish a PLN infrastructure offering structured, relevant, consistent, and coherent learning opportunities for Community Schools professionals...

AND

Support UWMB in clarifying and leveraging its role as an intermediary...

THEN

We will cultivate a system of cross-district connected Community School professionals...

THEN

The Massachusetts Coalition for Community Schools will establish a defined PLN infrastructure and an Aligned Regional Competencies (ARC) of Learning and Leadership to guide coherent and connected learning across the region — supporting all Community Schools professionals as they work to advance goals of the Coalition.

SO THAT

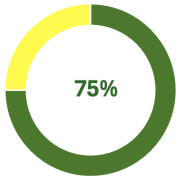
There is increased awareness, understanding, and support of the Community Schools strategy.

SO THAT

Community Schools professionals have the tools and resources to ensure effective local implementation while simultaneously agitating shifts in public policy and funding to sustain the strategy statewide.

Table 7

“If” Statements, Corresponding Outputs, and Progress Towards Goals

“If” statement	Outputs	Progress towards goal
<i>If I develop the state coalition’s</i> <i>ARC of learning that</i> <i><u>illustrates a coherent learning</u></i> <i><u>journey for Community</u></i> <i><u>Schools professionals</u></i> <i>to build</i> <i>their skills, knowledge,</i> <i>collaboration, and leadership</i> <i>capacity...</i>	- Developed ARC model of learning and leadership for Community Schools professionals - Created structured opportunities to obtain feedback from a representation of national experts, UWMB leadership, district leadership, and site-based CSDs/CSCs on the resources being created	 100%
<i>If I establish a PLN</i> <i>infrastructure offering</i> <i><u>structured, relevant.</u></i>	Administered a needs assessment	 75%

<u>consistent, and coherent learning opportunities for Community Schools professionals...</u>	● Convened PLN subcommittee ● Aligned competencies and skills guidance for CSDs/CSCs with the stages of development for a Community School ● Launched pilot PLN cycle for CSDs/CSCs ● Launched PLN summit for CSDs in Eastern MA	
<i>I support UWMB in clarifying and leveraging its role as an intermediary to efficiently facilitate local implementation of the Community Schools strategy and mobilization of Massachusetts Coalition for Community Schools</i>	● Conducted internal SWOT analysis ● Leveraged the expertise of United Way leadership in Chicago, New York, and Philadelphia that have had notable success establishing their roles as intermediaries mobilizing the Community Schools strategy in their contexts	

	● Co-facilitated general coalition convenings ● Co-facilitated Community Schools strategy and Massachusetts Coalition for Community Schools breakout during UWMB All Agency Strategic Learning for Systems Change virtual convening	
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IF I develop the state coalition’s ARC of learning that illustrates a coherent learning journey for Community Schools professionals to build their skills, knowledge, collaboration, and leadership capacity...

This strategic project concluded with a clear and structured ARC of Learning and Leadership for Community Schools professionals. This resource was necessary to bridge the gap in national guidance states rely upon to guide implementation of the Community Schools strategy with fidelity and agitate the status quo towards sustainability and systems change. The ARC establishes a coherent relationship between the overarching stages of development for Community Schools — emergent, maturing, and transformational (Community School Forward, 2020, p. 4) — and six essential competencies I adapted from the National Center for Community Schools, (n.d.), that scaffold the growth and effectiveness of Community Schools professionals on their journey from foundational knowledge to mastery and high-quality implementation within their leadership

contexts. The learning trajectory informs relevant, structured, and collaborative learning to support the transfer of new knowledge.

Feedback from CSDs/CSCs, previous research, as well as conversations with five national experts representing Ed Redesign, the U.S. Department of Education, National Center for Community Schools, and Institute for Educational Leadership, informed 11 iterations of this model. One CSD/CDC expressed, “I wish I had this a year ago... it would have been so helpful for me to have an idea of what I should be learning to better do my job.” Another individual provided feedback that interrogated the model for clarity: “What are the indicators for emerging? And what does it look like to be transformational vs. emergent?” These voices helped to increase the model’s relevance and utility.

AND IF I establish a PLN infrastructure offering structured, relevant, consistent, and coherent learning opportunities for Community Schools professionals...

Although I successfully established the Massachusetts Coalition for Community Schools PLN infrastructure, much work remains to ensure progress and sustainability. Feedback from the Lubin Family Foundation raised concern about duplicated efforts with regard to my strategic project and ultimately delayed launch of the PLN subcommittee for the statewide coalition. Yet it also compelled me to sharpen my focus on the characteristics of effective networks and UWMB’s ability to strategically operationalize the PLN to build shared public value around the Community Schools strategy.

Informed by the ARC of Learning and Leadership, and the PLN CSD/CSC pilot pre-survey, I designed one cycle of monthly professional learning sessions to be launched with a cohort of four CSDs/CSCs. Meetings were initially designed for two hours; feedback from participants expressed a desire for longer sessions to support learning and collaboration, so subsequent sessions were

extended to four hours. The competencies and skills identified in each session were mapped to specific objectives. In designing the CSD/CSC learning experiences, I grounded foundational content in research and data. Participants engaged in scenarios that provided practical application and opportunities to connect to prior learning. According to Teemant et al. (2024), these are the conditions that support the transference of learning. Applying their theory, subsequent sessions created space for participants to build community, deepen understanding of the Community Schools strategy, engage with guiding documents to foster liberatory leadership, and dual capacity-building practices. Participants also applied new learning and demonstrated their understanding as they took part in role-plays and simulations.

The pilot offered seven sessions, each aligned with an essential competency and relevant skills to support Community Schools professionals' roles as CSDs/CSCs. Sessions maintained a consistent flow of offering feedback and considering the implications for leadership. Attendance was 100% for the full cycle. Community School professionals actively participated in role-playing, crafted key performance indicator goals, and explored alignment between their School Improvement Plan and their assets/opportunities.

In planning each session, I coordinated with Renée and Dante DeTablan, Research Evaluator, providing direct support to the CSDs/CSCs. Together, the three of us ensured that the PLN topics and objectives were relevant. Our first meeting was in October 2024. Teams engaged in deep listening exercises and case-based scenarios to ground their learning. The meeting structure also invited feedback at the end of every session. Feedback rendered, reflected that participants were satisfied. After our first session, all participants shared that they found the session beneficial and advocated for engaging in a four-hour monthly meeting.

As shared previously, it was in November, almost by happenstance, that I landed on the essential skills and competencies for CSDs/CSCs. This resource helped to strengthen the PLN's

applicability and relevance. In preparation for October's meeting, there was intentionality in adapting resources to be responsive to what Community Schools professionals shared about their general experience. However, having the competencies and skills allowed me to create more coherence and explicit support in developing focused skills that were aligned with the research-based stages of development and their respective context.

Convene PLN subcommittee

The PLN infrastructure of the state coalition offers normed, structured, relevant, and consistent learning for Community Schools professionals. However, as UWMB spearheads a statewide coalition focused on advancing public value, namely the Community Schools strategy as a mitigator for families and students suffering the deleterious consequences of poverty, creation of a PLN infrastructure is not exempt from the influence and impact of what Frank and Bory (2015) regard as contextual factors. In leading systems change, one must acknowledge that a network only becomes effective as its connected people or organizations collaborate towards a shared vision and goal. Simply put, core determinants of network effectiveness are its function and inner processes. As a key function of the coalition, the PLN is charged with creating the conditions that give rise to collaboration, increased knowledge, understanding, and advocacy to sustain the strategy.

Our state coalition meetings developed a monthly cadence, which yielded an opportunity to advance my strategic project. At the end of the fourth general meeting, eight attendees representing Lynn Public Schools, Citizen Schools, the Massachusetts Teachers Association, YMCA of Boston, Chelsea Teachers Union, and Lowell Public Schools expressed interest in joining the PLN subcommittee. I subsequently followed-up in a brief email to schedule a feasible time to meet.

I convened the inaugural PLN subcommittee meeting on Friday, January 31, 2025 (Artifact I). On that same day, President Trump's Executive Orders on immigration at that time had led to reports of U.S. Immigration and Customs Enforcement (ICE) showing up at schools and other

family-serving institutions across the nation, and that morning our sites were not exempt. According to one school district participant, “I may have to excuse myself for dismissal today from the meeting around 1:35PM; ICE was just parked outside.” Attendees entered our first session feeling unsettled, and it was important to create space for our small community’s voice, as we collectively determined how to proceed. When given the choice to reschedule our meeting, all attendees agreed to continue the meeting as scheduled. Attendees expressed their desire and continued interest in being a part of the PLN subcommittee and described it as a space where they could strategize and take action to strengthen the Community Schools strategy for all families in our region. Members of the subcommittee expressed hope in statewide adoption of the Community Schools strategy being a direct lever to change local outcomes for marginalized communities. One participant said, “Being in this group [network] makes me feel like I can do something.”

AND IF I support UWMB in clarifying and leveraging its role as an intermediary to efficiently facilitate local implementation of the Community Schools strategy and mobilization of Massachusetts Coalition for Community Schools...

Throughout the extent of this strategic project, I successfully supported UWMB in clarifying and leveraging its role as an intermediary to efficiently facilitate local implementation of the Community Schools strategy and mobilization of Massachusetts Coalition for Community Schools. Initiating the internal SWOT analysis and one-on-one conversations revealed held perspectives about UWMB’s role, by internal staff and external partners.

I coordinated three meetings between leadership of United Way in Chicago, New York, and Philadelphia and our local UWMB. I facilitated conversations that highlighted notable successes and challenges of our colleagues leading the Community Schools strategy as intermediaries in their local contexts. These conversations underscored the importance of UWMB gaining internal clarity of its

role as an intermediary and which functions could be used at this stage of the movement. The insights also informed the approach Sarah, Renée, and I would adopt as we planned to engage key constituencies.

A key milestone was our November 7 session, “The Role of Intermediaries in System Change,” facilitated by national experts from the Institute for Educational Leadership (Appendix J). The need for this session arose from the SWOT analysis that showed an internal need to define and clarify our role as an intermediary and foster cohesion across our five key impact areas.

As a convener and intermediary, UWMB brought together cross-sector partners for the Massachusetts State Coalition for Community Schools monthly meetings. At these meetings, we collaborated with organizations interested in joining the coalition, to advance the Community Schools strategy as a public value. I continued to be an active voice in co-visioning the learner experience towards increased statewide collaboration. Additionally, I launched the coalition’s PLN subcommittee, strengthening the infrastructure to sustain and scale successes of the PLN pilot. As of March 2025, UWMB has convened eight state coalition meetings.

Conduct SWOT analysis and Combination of Interviews/Surveys

Trends from my analysis were categorized into three themes: 1) skill and competency development 2) attendance and participation 3) increased frequency of collaboration and shared resources, and 4) sustainability (see Table 5). This exercise gave me the opportunity to center the voices of members in our work community. Aligning with UWMB’S value, these voices contributed to shaping the experience of those we (as an intermediary) were directly convening and engaging.. Later actions, including: integration of the Community Schools strategy on the All Staff Winter In-Service Training; our internal workshop on intermediaries, which I collaborated on with Sarah, Renee, and two national experts from the Institute for Educational Learning, to design the agenda; and my co-facilitation of the general coalition convenings and the Community Schools strategy and

Massachusetts Coalition for Community Schools breakout during the UWMB All Agency Strategic Learning for Systems Change Virtual Convening.

Table 8

“Then” Statements, Corresponding Outputs, and Progress Towards Goals

<i>“Then” statement</i>	Outputs	Progress towards goal
<i>THEN</i> <i>We will cultivate a system of cross-district connected Community School professionals</i>	• Cross-district PLN opportunity • Budding partnerships • National Center for Community Schools Fundamentals conference	 100%
<i>THEN</i> <i>Massachusetts Coalition for Community Schools will establish a defined PLN infrastructure and an Aligned Regional Competencies (ARC) of Learning and Leadership to guide coherent and connected learning across the region — supporting all Community Schools</i>	• PLN • Conceptual framework	 100%

<i>professionals as they work to advance goals of the Coalition.</i>		
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THEN, we will cultivate a system of cross-district connected Community School professionals...

During the November 2024 Community Schools Fundamentals Conference, two new Community Schools Coordinators from Haverhill shared learning experiences and connected with four Community Schools professionals from Boston Public Schools: a superintendent, principal, and the city-wide coordinator for Community Hub Schools.. These connections sparked conversations about opportunities for cross-district school visits and possible collaboration among them.

The PLN pilot and PLN subcommittee both fostered opportunities for cross-district connections among Community Schools professionals. During our last PLN pilot session on March 18, 2025, I encouraged CSDs to join one of the state coalition’s working groups. A CSD who had already joined the PLN subcommittee indicated that they had a scheduled meeting with Citizens Schools (per email correspondence, 3/18/2024 from PLN_CSD Pilot Participant). This connection came as a direct result of our network engagement. Additionally, in reflection about cross-district opportunities, a PLN_CSD pilot participant shared, “The PLN_CSD engagement has created multiple opportunities for me to reach out to colleagues for cross-district collaboration. I have reached out to one colleague on multiple occasions to get guidance on how to find valid data sources for school/district data. I have reached out to another colleague in regards to how she supports her underserved families during the holidays as well as how she organizes her bi-weekly food box distribution. I have also emailed/texted her in regards to resources/CBO's that I may reach out to get support for our student and family pantry. Thank you for coordinating and facilitating our PLN's!” (Email Correspondence, March 2025)

THEN, Massachusetts Coalition for Community Schools will establish a defined PLN infrastructure and an Aligned Regional Competencies (ARC) of Learning and Leadership to guide coherent and connected learning across the region — supporting all Community Schools professionals as they work to advance goals of the Coalition.

The following building blocks are defining the PLN infrastructure: a shared vision, a developmental framework, collaborative learning structures, active cultivation of relational trust, regular feedback loops, and strategic alignment with Massachusetts Department of Elementary and Secondary Education. Significant progress has been achieved across each category and is captured throughout the implementation of this strategic project.

One such instance was on January 21, 2025. I facilitated a cross-district training with 17 professionals from Boston, Haverhill, and Lynn Public Schools focused on developing communication strategies to amplify the Community School strategy in our region. Participant feedback indicated that they valued networking, sharing ideas, and meeting new colleagues during the training. One participant stated, “Networking with other coordinators/directors, it gave me a chance to learn new perspectives on how this role can develop.” Strikingly, 80% of respondents expressed interest in co-presenting an aspect of the Community Schools strategy. This is relevant in that it shows the professionals’ growth, confidence and enhanced capacity as they are ready to lead the messaging and socializing of the Community Schools strategy as a public value. They are essentially sharing in the reframing about PLNs and the Community Schools strategy.

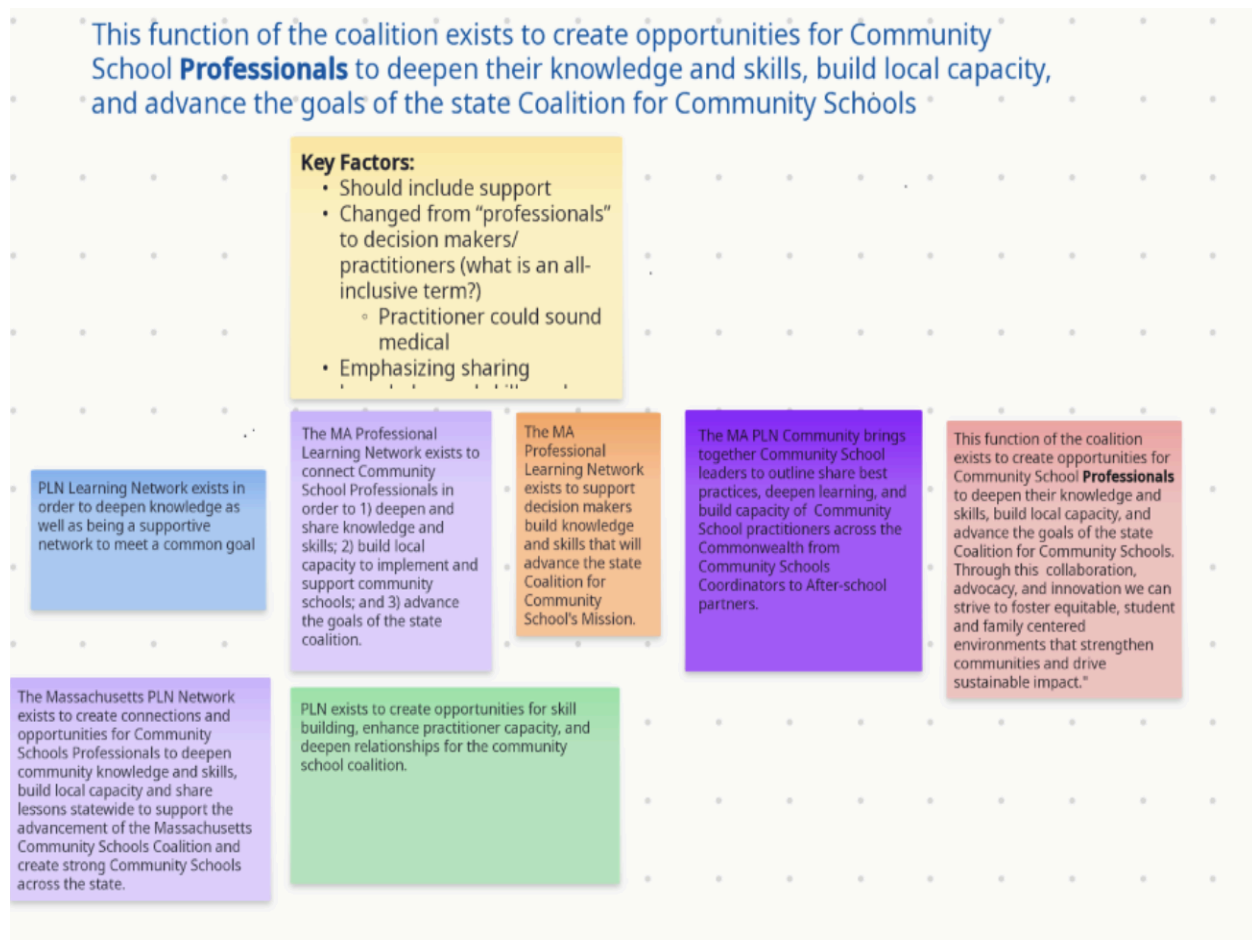
The ARC establishes a non-linear conceptual framework that provides a coherent learning and leadership capacity building path for Community Schools professionals at each level of development (emergent, maturing, and transformational) to build knowledge, leadership expertise,

and transferable skills. As the Community Schools strategy expands statewide, the ARC works in tandem with the PLN to yield a sustainable infrastructure.

Our second PLN subcommittee meeting in March reflected efforts towards cross-sector collaboration and shared accountability as core features in the infrastructure. During our engagement, I reintroduced our values from the state coalition, calibrated on the collective's understanding and expectations of the intended impact of the PLN and our roles and responsibilities. I facilitated a collaborative design as we workshoped our mission to build ownership and center community voice (see Figure 10)

Figure 10

PLN Subcommittee Meeting — Workshoping PLN Mission, March 2025



While the PLN subcommittee is now successfully established in the Massachusetts Coalition for Community Schools, further work is necessary to determine the governance and leadership structure.

Analysis

This section captures my analysis of why my strategic project unfolded as it did. Zooming in on three areas I identified as critical change levers for this project—developing an ARC model of learning and leadership, establishing the Massachusetts State Coalition for Community Schools PLN infrastructure, and strategic role clarification—I drew upon the components of Mark Moore’s strategic triangle to understand the contextual challenges and supports that contributed to my success.

Public Value Lens

In Mark Moore’s (2019) definition of public value, he describes it as “a concept that directs your attention to conditions in the world that you’d be interested in improving.” Throughout my strategic project, there was a clear centering of the Community Schools strategy as a shared purpose. Within the coalition and as an intermediary, our collective efforts concentrated on leveraging the strategy to mitigate consequences of poverty in the lives of children and families statewide. This shared value was an essential contributor to the success of the Professional Learning Network (PLN), the Aligned Regional Competencies (ARC) of Learning and Leadership, and supporting UWMB’s role as intermediary.

My development and facilitation of the Professional Learning Network (PLN) pilot drew on a design process that leveraged community voice and practitioner expertise. In prioritizing the needs and strengths of Community School Directors and Community School Coordinators, the

PLN_CSD/CSC pilot became a trusted space for learning, leadership development, collaborative problem-solving, and building relationships; thereby, strengthening value for the individual Community School professionals and the system at large.

As I supported our role as the intermediary spearheading a multi-pronged Community Schools agenda, UWMB in partnership with local organizations, including, but not limited to: Massachusetts Education Justice Alliance, Boston Teachers Union, the American Federation of Teachers, and University of Massachusetts, created space for cross-sector collaboration and co-creation. The increase in attendance and participation during our monthly state coalition meetings and the official sign-on of eighteen organizations further illustrates the budding amalgamation of collective priorities under a shared purpose.

Additionally, I orchestrated a collaborative and data-driven approach through surveys, one-on-one conversations and other feedback methods that supported a responsive rather than prescriptive process. I created opportunities for Community Schools professionals to provide input through plus, delta feedback surveys administered at the end of each meeting. This resulted in transparent adjustments that affirmed their voices and helped strengthen a shared mission, particularly among the PLN_CSD pilot group.

Operational Capacity: Navigating the “How” of Strategic Execution

According to several Community Schools professionals, the PLN_CSD/CSC pilot and Aligned Regional Competencies (ARC) of Learning and Leadership for Community Schools Professionals offered a relevant and meaningful resource. One Community School Director expressed, “I always say, now that I am a Community School Director, what do I do? This ARC tells me where my focus needs to be.” (CSD, Feedback session, 2025). While integrating research-aligned competencies and liberatory practices, the framework and the pilot were both shaped through a

continuous, community-informed process of co-creation. Analyzing the overall success of my strategic project through the lens of operational capacity required an in depth look at how the work unfolded. Assessing the contributing conditions for my progress and delays, I've identified three key factors that significantly supported the deployment of resources and advancement of shared public value: my leadership expertise, the strategic use of my time, and United Way of Massachusetts Bay's (UWMB) trust in my vision and capability.

1. My Leadership Expertise

As a systems-level education leader transitioning into the nonprofit sector, I brought nearly 30 years of deep experience in strategic planning, capacity-building, and liberatory-centered facilitation. This expertise allowed me to design and pilot the Professional Learning Network (PLN) using a responsive, practitioner-informed model. I invested time in building trusting relationships with Community School Directors and Coordinators, facilitating Plus/Delta sessions, and synthesizing feedback to iterate the ARC of Learning and Leadership numerous times. My skills in instructional design, facilitative leadership, and cross-functional team-building enabled the successful co-design and launch of the PLN_CSD/CSC pilot, and the development of an aligned learning trajectory that resonated with Community School professionals.

2. Dedicated Time as a Strategic Advantage

Unlike many of my colleagues at UWMB who were managing multiple initiatives simultaneously, as a doctoral resident, I had the unique opportunity to dedicate concentrated time to a single strategic project. Having a time-bound residency assignment (ten months) with UWMB allowed me to maintain a narrow scope with deep intentionality, particularly in the areas of research, co-design, and facilitation. I was able to dive into the literature on professional learning networks, liberatory leadership, and intermediary capacity-building, and then translate those insights into actionable strategies for the PLN and the ARC. My focused attention created space for real-time

responsiveness as I integrated feedback from practitioners, continuously refined the ARC, and co-designed sessions that were both content-rich and culturally sensitive. This depth would not have been possible under a broader project load.

3. UWMB's *Trust in My Vision*

UWMB's trust in my leadership provided the autonomy and relational space necessary to bring the project to life. Even though I was several layers removed from the executive leadership team, my ability to center conversations, synthesize big ideas, and drive results positioned me as a credible thought leader within and beyond the organization. This trust allowed me to act as a connector across coalition partners, intermediary allies, and local Community Schools professionals.

Despite the success experienced, as the project unfolded, two particular contextual factors broke my momentum —my novice entry to the nonprofit sector, and UWMB's leadership transition. Pivoting from public education to the nonprofit realm required me to rapidly learn a new organizational context, jargon policies, and procedures. I had to learn to adapt to different types of influence and coalition politics. I spent more time trying to build my understanding of how internal systems worked and relationships with internal and external partners, which slowed my initial process down.

Regarding the leadership transition, it took nine of my ten-month tenure to appoint UWMB's new CEO. In my assessment, this created a leadership gap that hindered clear articulation of UWMB's role as an intermediary supporting the Community Schools movement and deferred endorsing Community Schools as a cross-cutting strategy. The absence of direction created a sense of uncertainty of our role as an intermediary and the broader relevance of the Community Schools strategy to UWMB's mission. Even more directly, the gap in leadership required more time on my part to support the staff's understanding of the importance of our role as intermediary across our key impact areas and the relevance of the Community Schools strategy.

Legitimacy and Support: Navigating Authorization and Funder's Perceptions

Legitimacy and support are critical for any public value initiative to succeed. This component of the strategic triangle refers to the ability to marshal political, legal, and financial assets. It includes funder support, public trust, and coordinated constituency to advance the shared purpose.

UWMB's social impact track record and role as a convener of cross-sector organizations along with its recognized leadership in advancing Community Schools meant that UWMB as an organization had a lot of legitimacy related to the Community Schools work in Massachusetts. UWMB authorized me to lead work around capacity and leadership building for Community Schools, thereby legitimizing my efforts with a variety of constituencies. This authority allowed me to collaborate with cross-sector partners to iterate the ARC and pilot the PLN_CSD/CSC.

Another legitimizing factor was the explicit alignment between my project and UWMB's mission of building an economically just region. The United Way WorldWide had previously established the Community Schools as a cross-cutting strategy and according to Sarah, it was her hope that UWMB would follow suit. My work on the PLN directly supported leadership development and skill building, each of which contributed to a broader scope of impact and sustainability, beyond Community Schools.

While my project was authorized and viewed by local and national nonprofit leaders as a promising roadmap for coherent statewide professional learning for Community Schools professionals, securing support from funders raised concerns about the relevance and potential redundancy of focusing on the development of the Professional Learning Network infrastructure. Without external backing from funders, I had yet to gain full legitimacy. If Community Schools are considered a cross-cutting strategy advancing UWMB's mission towards an economically just region, then securing additional funding is reliant upon their ability to operationalize relevant resources, gain

legitimacy, and garner reassurance that their public value (mission) is recognized as a shared interest among current and future funders.

The absence of explicit support from the authorizing environment led to delays in my ability to both launch the Professional Learning Network pilot and establish the State coalition for Community Schools Professional Learning Network subcommittee. Consequently, this delay further impacted the possibility of launching the Professional Learning Network Summit prior to the conclusion of my tenure with the organization. In hindsight, I took for granted that funders, partners, and colleagues shared a common understanding and value with regard to the PLN infrastructure as a function of the coalition. But it wasn't that simple.

During a meeting with funders, I realized that there were preconceived narrow notions about PLNs as a medium for skill-building. The idea that PLNs could catalyze system shifts while facilitating local impact was being introduced through my project for the first time, and I neglected to unpack perspectives and scaffold understanding across the continuum of key constituencies, so I was met head-on with a barrier. It is also possible that their hesitation stemmed from a singular perception of the Professional Learning Network as a structural means to foster local level skill-building. However, Rincón-Gallardo and Fullan argue that effective networks can be described as collaboration [a strategy] that drives local impact and systemic change by:

- Deepening learning and engagement.
- Enhancing the professional capacity of leaders and teachers.
- Becoming a positive force of whole system improvement.

(Rincón-Gallardo & Fullan, 2016)

Altogether, in a broad analysis, the development of the Professional Learning Network (PLN) infrastructure and the Aligned Regional Competencies (ARC) framework has strategically advanced UWMB's role as the intermediary within Massachusetts Community Schools movement.

Throughout the process, I was navigating unfamiliar structures while learning how to lead with influence rather than authority. I was building a public value case while still learning how value is framed and measured in nonprofit systems. Success was related to my ability to navigate the dynamic interplay between public value, operational resource and the authorizing environment, with the authorizing environment posing the most significant challenge in my efforts to secure our key funder's support.

Implications

On June 16, 2024, I stepped into a new realm within the education ecosystem. I joined the United Way of Massachusetts Bay (UWMB), a nonprofit intermediary positioned at the helm of a statewide effort to leverage the Community Schools strategy as a conduit towards systems change. I had the privilege of working alongside Sarah Link and Renée Omoladé, two visionary and compassionate leaders spearheading the resurgence of the Community Schools movement in Massachusetts.

While I was a novice in the nonprofit sector, I was able to leverage my PK–12 expertise to bridge sectors, connect ideas, and contribute meaningfully to strategy conversations. I was welcomed into UWMB not just as a doer, but as a thought partner. This invitation affirmed the value of my leadership and professional experience. Throughout the project, I leaned into what I coined 'the three strategic dispositions' of an effective intermediary, as I:

- Practiced **Align** through deep listening and deliberate collaboration to build shared purpose across diverse constituency
- Embodied **Activate** by offering insights, facilitating learning, and co-creating solutions; and

- Grappled with **Agitate** by holding space for critical questions, interrogating the status quo, and advocating for systemic coherence.

Leading my strategic project at UWMB offered a mirror that reflected areas of growth and new dimensions of my leadership. It sharpened my understanding of what it means to act as an intermediary; to catalyze alignment, activate and agitate towards sustainable systems change. Most importantly, I experienced an evolving version of my best self, an educational architect, an advocate committed to liberatory practice, lifelong learning, and sustainable systems change.

This section outlines emergent themes in my learnings as related to implications for myself, the site, and the sector.

Implications for Self

1. Think Big–Act Small AND Keep Moving
2. The Authorizing Environment — *Wind Filling the Sails of Progress*

Think Big–Act Small

Two specific moments underscore that when strategically orchestrated, it is okay to think big *and* act small. In preparation to launch the PLN pilot, I planned to engage all CSDs/CSCs across the six districts in a cycle of cross-regional collaborative learning. Excited about my plan, I presented this ambitious proposal to the Senior Director of Education and Community Schools. After listening to my presentation and agreeing with the focus, goals, and process I described, the Senior Director offered, “Think big and act small, Phoebe.” She further added that initiating with a smaller sample size could negate factors germane to organizing larger groups that may delay or affect other aspects of the launch.

My internal response immediately rejected the idea of acting small, because we were addressing a big issue—the impact of poverty on educational outcomes—and our actions also needed to be big to support all Community Schools professionals. But as we were speaking, I decided to embrace the insight offered and be curious about my gut reaction. I realized that my ‘North’ leadership style was in full effect (Center for Leadership and Educational Equity, n.d.). There was an identified challenge of launching the pilot, and confident that I could work through the challenges that may have surfaced, I was ready to start. In that conversation, I realized that while I was more than ready for the challenge and ready to execute, I wasn’t focused on the ultimate goal of the pilot: to “learn”. More than compliance, the pilot was supposed to be an iterative experience informing the design of our Professional Learning Network (PLN) summit scheduled for April 2025.

In fact, my initial plan to incorporate six districts would have required more time to coordinate with district leaders who not only had their respective priorities but with whom I had yet to form relationships. Thus, the PLN pilot was launched with a smaller sample size, allowing me to keep the project moving.

The Authorizing Environment — *Wind Filling the Sails of Progress*

Entering the nonprofit sector, I was particularly interested in deepening my understanding of effectively securing and mobilizing resources to effectuate an organization’s priorities. However, I did not anticipate the dynamics and influence of philanthropy and the external influence in the sector. This became evident when aspects of my project were paused pending further conversations with funders who sought additional clarity about the PLN work I was leading. While their desire for greater understanding was valid, this experience underscored the power of philanthropic dollars to shift priorities—and, at times, introduce mission creep as organizations attempt to gain legitimacy..

Initially, unsure how to respond to the shifting tide, I focused on supporting internal efforts to help clarify UWMB's role as an intermediary. Dr. City and Professor Reville challenged me to consider what aspects of the pilot could continue moving forward. Through ongoing conversations with Sarah and Renée as well as feedback from national experts and CSDs/Cs, I continued iterating the ARC.

Importance in Reframing the Narrative

Bridging Mark Moore's strategic triangle, when public value is reinforced/supported by the authorizing environment, it facilitates the extent to which there is successful mobilization and marshaling of assets to change conditions and sustain outcomes aligned to shared public value. Understanding the importance of professional learning through my leadership experience as a principal and district leader, I was immediately curious about the delineation of the PLN as a key function of the state coalition. I viewed it as an operational pathway to mobilize resources to support the Community Schools strategy locally and statewide. My curiosity lingered at the intersection of professional learning and networks. Could this intersection reveal an untapped lever for advancing local impact and systemic change? *What are essential characteristics of effective PLNs?* These questions guided my work and informed key conversations. While I shared my curiosity and emerging insights with Sarah, Renée and national partners, in hindsight I missed an opportunity to 'sail with the system' by deliberately engaging other critical constituencies (funders) at the outset of that learning journey.

To date, as the project continues, I am actively leveraging UWMB's convening authority to bring people and organizations together to collaboratively reframe the narrative around Professional Learning Networks (PLNs) and broaden perspectives on their under-utilized potential to shift local policy and build capacity. As a systems leader, overcoming this barrier taught me the importance of

strategically including key constituencies in my learning journey as I cultivate the conditions to advance the mission and build public will.

Implications for UWMB

- 1. Align: Foster Statewide Coherence and Shared Language Around Community Schools**
- 2. Activate: Invest in Differentiated Learning Pathways for Community Schools Professionals**

Align: Foster Statewide Coherence

In its role as an intermediary, UWMB is encouraged to take a deliberate approach to fostering cross-sector coherence and shared language around the Community Schools strategy, statewide. By leveraging the three key functions I focused on during this strategic project — consultation and technical assistance activities, purveyor of evidence-based practices, and training, public awareness, and education — the organization is well-positioned to build on the current Professional Learning Network(PLN) infrastructure. To deepen learning and engagement and create traction leading to increased legitimacy and support for the Community Schools strategy, I recommend the following next steps in accordance with the aforementioned functions for UWMB.

Next Steps:

1- Consultation and Technical Assistance

- Support the state coalition’s PLN Subcommittee in co-designing regional learning labs with Community School Directors/Coordinators, Principals, District Leadership and Partner Organizations to address adaptive challenges and support local implementation fidelity. This will help establish role-specific collaborative spaces that

ground learning and leadership development in the ARC framework, creating conditions necessary for high-quality local implementation.

2- Purveyor of Evidence-Based Practices

- Publish and circulate a Massachusetts Coalition for Community Schools Toolkit featuring ARC-aligned practices, success stories from the PLN_CSD/CSC pilot, coalition-generated tools, and guiding documents (e.g., mission, values statement, liberatory practices, and the Dual Capacity-Building Framework). This will help codify learning and create a practical entry point for emergent Community Schools professionals engaging in the strategy.

3- Training, Public Awareness, and Education

- Support the state coalition in hosting an annual Community Schools Summit to elevate practitioner voices, build public awareness, and galvanize policy support. This will help increase visibility of the strategy and public promotion of Community Schools as a statewide strategy.

Why It Matters:

As UWMB operates at the intersection of policy, practice, and the public interest, these next steps are relevant to its role as intermediary advancing a statewide Community Schools agenda. Collectively, they not only disrupt deficit narratives, but also work together to foster the shared understanding, values, and commitment necessary to secure the strategy as a coherent statewide intervention. By aligning individual purpose with collective vision, UWMB can help reframe the way diverse constituencies—educators, health providers, funders, partners and community leaders—*see, think, and relate* with regards to the Community Schools strategy. Furthermore, these next steps explicitly position UWMB as the facilitator of cross-sector coherence towards a more liberatory and sustainable model of system-wide transformation.

Activate: Invest in Differentiated Learning Pathways for Community Schools Professionals

UWMB is encouraged to invest in a tiered system of differentiated professional learning and coaching to support the full range of Community Schools professionals. Although Community School Directors and Coordinators are key, effective implementation and long-term sustainability necessitates the active collaboration and engagement of school-based staff, district leaders, community-based organizations, policy advocates, and legislators.

As an intermediary, UWMB is uniquely equipped to lead the design and dissemination of best practice models that strengthen capacity across a diverse ecosystem. The following next steps are recommended to help UWMB activate a robust professional learning infrastructure and implementation readiness in tandem.

Next Steps:

1. Design and Spread of Best Practices Models

- Facilitate the expansion of the ARC by developing learning progressions that outline clear, role-specific skills and growth indicators for teachers, principals and district leaders across the emergent, maturing and transformational stages. This will help make the ARC more actionable, supporting implementation fidelity across the system.
- Support the state coalition's PLN_subcommittee in launching a regional coaching and mentorship network rooted in liberatory leadership and culturally responsive practices. The network should include:
 - Peer mentors
 - Technical assistance providers
 - Reflective practice facilitators

This will help create coherence in role-specific ongoing support structures that foster leadership development and deepen professional capital.

Why It Matters:

These next steps are relevant because they *activate* the skills, knowledge, and structures needed for efficient and sustainable local implementation of the Community Schools strategy. In accordance with UWMB's role as an intermediary, these actions move from theory to action, creating an infrastructure and support systems that enable Community Schools professionals to grow, lead, and collaborate more effectively. Advancing this approach positions UWMB not only as a convener but also as a systems architect, shaping conditions and structural support for sustainable impact in pursuit of an economically just region.

Implications for Sector [Intermediaries]:

Reflecting on a central question at the onset of my strategic project, "*What role might UWMB play as intermediary to support statewide learning that drives and sustains the Community Schools strategy?*" I engaged as both a strategist and implementer, supporting UWMB in mobilizing the Massachusetts Coalition for Community Schools through the conduit of the Professional Learning Network infrastructure.

Through this dynamic work, I've come to understand that intermediaries advancing the Community Schools Strategy must see themselves as field agitators, boldly rallying for structural change, economic justice and public investment. While individual Community Schools and districts may engage in localized advocacy, and knowledge building, intermediaries are uniquely positioned at the intersection of policy, practice and people to amplify and scale outcomes. By strategically leveraging the seven key functions of an effective intermediary, including:

1. Consultation and technical assistance activities
2. Development of best practice models
3. Purveyor of evidence-based practices
4. Quality assurance and continuous quality improvement
5. Outcome evaluation
6. Training, public awareness, and education
7. Policy and systems development

(Frank & Bory, 2017), intermediaries can deliberately:

- *Align* people and purpose across regions and sectors
- *Activate* capacity across a wide range of Community Schools professionals, and
- *Agitate* systems, structures and status quo to advance statewide and even national transformation.

Embracing this expanded role as field agitators, is a highly recommended next step for intermediaries committed to sustaining Community Schools as a liberatory-lever for systems change—a role they can begin to embody by convening public learning events to elevate field agitation and coalesce cross-sector commitments.

Why It Matters

Hosting these public learning convenings allows intermediaries to move beyond coordination and capacity-building into field-level agitation. In turn, this creates space to elevate co-collaboration, reframe narratives, and catalyze public will around the Community Schools strategy. Intermediaries across the country are invited to view public convenings not as optional, but as relevant functions of their liberatory-centered strategy. Whether regional, statewide, or national, these events are opportunities to align constituencies, activate professional capacity, and agitate systems, thereby

generating public pressure, political traction, and coalition coherence needed to move Community Schools from a national promising practice to permanent policy.

Conclusion

In an organization with deep commitment to local communities and an extensive social impact record, UWMB's charge to expand Community Schools and mobilize Massachusetts Coalition for Community Schools complemented their mission towards an economically just region. The need for clarity around how their role as the intermediary might best advance a sustainable movement led the UWMB to develop and implement a strategy that supported learning and coalesced Community Schools Professionals under a shared vision.

This project demonstrates the transformative potential of Professional Learning Networks (PLN) when designed with intentional alignment to public value, and system needs. As illustrated, the PLN is not merely a structure for technical support—it is a catalyst for both local impact and statewide systems change. To realize that potential, networks must be guided by a framework that is broad enough to include a diverse range of professionals, yet focused enough to remain relevant to their roles and contexts. The Aligned Regional Competencies (ARC) of Learning and Leadership for Community Schools Professionals was that guide. It provided a throughline for learning and leadership development across varied roles and contexts. It served as a strategic tool to scaffold learning, build coherence, and reinforce shared public value across the PLN. Together, the PLN-CSD/CSC pilot, the Massachusetts Coalition for Community Schools PLN Subcommittee, and the ARC framework marked the early construction of an infrastructure that equips leaders not just to implement a strategy—but to embody and sustain it.

UWMB's role as an intermediary was essential to this process: convening, bridging people, and building awareness, while operationalizing resources and navigating the authorizing

environment. Leveraging the ARC of Learning and Leadership alongside Mark Moore's Strategic Triangle, the PLN became a living model of public value in action.

Above all, this experience revealed that intermediaries facilitating leadership development for community and systems transformation requires more than visionary aspiration—it demands a strategically deliberate approach towards:

- Deepening learning and alignment around people, purpose and strategy **(Align)**;
- Enhancing agency through skill-building and adaptive leadership **(Activate)** and;
- Rallying the system in pursuit of equity and transformation **(Agitate)**.

Today's political and economic realities demand that UWMB and similar intermediaries move beyond managing programs and distributing grants. They must operate as field agitators and co-designers of public value—activating networks, securing trust from authorizing environments, and marshaling resources toward meaningful, measurable outcomes for communities. Beyond the sector, let us continue to cultivate a society that does more than imagine change.

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Appendices

Appendix A

A Shared Path to Success

Original Chancellor Letter, New York City Department of Education (2012)



Dear Colleagues,

I wrote to you in [November](#) about our plans to change our policies to support students with disabilities better in order to raise the bar for all of our students. The special education reform, rolling out citywide in September 2012, is aimed at ensuring that all students with disabilities are educated to high academic standards, in the least restrictive setting that is academically appropriate, and at the same schools they would have access to if they did not have IEPs.

To implement these changes in our instructional practice effectively, we will need to make challenging but critical adjustments to current practices in special education operations. And to ensure we are prepared for a successful citywide implementation of this initiative in the fall, we must begin to make changes to some of our systems this spring. As described below, beginning later this month we will offer support to you and your school teams in considering how best to implement the special education reform in your school community.

Beginning this fall, to provide students with disabilities the opportunity to attend the same schools they would have access to if they did not have IEPs, we are making several modifications to our enrollment policy:

- Schools will be asked to serve students in articulating grades from their local communities, regardless of IEP program recommendation.
- Choice, non-zoned, and screened schools will be asked to admit and serve a percentage of students with disabilities equivalent to the percentage of students with disabilities in their district or borough.
- School teams will be expected to meet the needs of students identified for special education services within the context of their school. Students with significant needs (i.e., students in need of specialized programs or barrier-free sites) will continue to be served at schools that have those provisions.

These changes to the DOE's enrollment policy are applicable to students entering your schools this fall through the articulation process as well as to those students entering the system "over-the-counter." As you are considering how best to serve students who are new to your schools, in line with federal

mandates that students be served in the least restrictive environment, we encourage you to recommend more flexible programs and inclusive classroom environments for students whenever possible.

To align with the changes outlined above, we have modified the [Special Education Student Projection \(SESP\)](#) application, which opens next week for elementary and middle schools. Schools will now be projected for individual students, and no longer will have to project classes as in past years. To help schools transition to this new model, we will support your school team to ensure that you are able to provide services in accordance with students' IEPs. These necessary changes will help your teams provide more individualized scheduling options for students and maximize the time during which students with disabilities are educated alongside their peers without disabilities.

We recognize that this transition is a substantial one, and we will support your school community as you begin to change your practices related to special education. I encourage you to take advantage of the opportunities available to you over the coming weeks to learn more about what these changes mean for your school and to understand better how you and your staff can prepare for this transition before September:

- Principal Feedback Sessions (late January-February): DOE senior leadership will join your network principal meetings to discuss specific policy changes, listen to your feedback, and identify additional supports that you will need. Each network's instructional coach for special education and other key members of the network team will be present at these sessions to support your school further.
- Student Projections Webinar (Wed., January 18): This webinar will be followed by an opportunity for elementary school principals to learn more about changes to the "Turning 5" process. Registration details are available [here](#).
- Professional Development Workshops for School Psychologists (January 23-February 10): To support the "Turning 5" process, we will hold five borough-based workshops for school psychologists on writing effective IEPs for incoming kindergarteners with disabilities. More details will follow in an upcoming issue of *Principals' Weekly*.
- Information Sessions for Families (late March-early April): These information sessions, about parent and family participation in the IEP process, will include overviews of the special education reform. More details will follow in an upcoming issue of *Principals' Weekly*.

I encourage you to share this letter with your School Leadership Team as well as with your school community at large. Please direct any questions to specialeducationreform@schools.nyc.gov. Thank you for your ongoing commitment to excellent education for all our students.

Sincerely,
Dennis M. Walcott

Appendix B
UWMB_Phoebe's Internal Introduction Email
Community Conversations with Phoebe
Tuesday, July 16, 2024

Community Conversations w/Phoebe

PG Phoebe Grant-Robinson
To: Nicole [REDACTED]

📧 🔄 📧 📧 📧 📧 📧 📧
Tue 7/16/2024 2:34 PM

Dear Nicole,

Trusting that this message finds you well...

Can you believe I'm now in week 5!?! Thanks for being my first in-office connection 😊

This year, I will be working with our Community Impact Division, particularly focused on Community Schools. As a former school leader of a Community School, I am thrilled to join you, the United Way of Massachusetts Bay, and our partners in leading the movement towards a sustainable **Massachusetts Community Schools Coalition!**

In exploration of how we are positioned to do this work in alignment to our strategic plan and theory of action, we invite you to engage in a brief one-on-one conversation. These conversations are an opportunity for us to internally practice our value of leveraging community voice, which will inform our goals, priorities, and next steps. In addition, these conversations generously afford me a chance to connect with you.

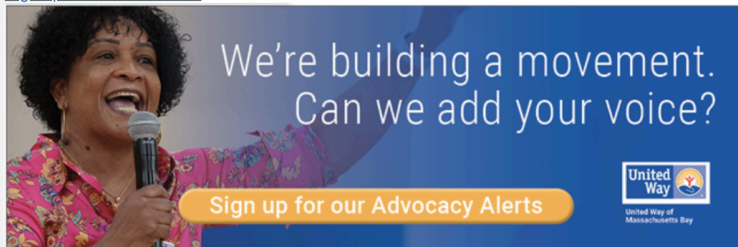
While I can imagine how busy your schedule is, please know that I thank you in advance for your consideration. Kindly use this [link](#) to book a 30 minute time slot that works for you in the next two weeks.

Looking Forward,
-PGR

Phoebe Grant-Robinson
Community Impact Advisor
United Way of Massachusetts Bay
Office Address: 9 Channel Center Street, Suite 500 | Boston, Massachusetts 02210
Mailing Address: PO Box 51381 | Boston, Massachusetts 02205-1381
(O) 617. 624. 8247 | ext 8247 | unitedwaymassbay.org
[Book time with Phoebe Grant-Robinson](#)

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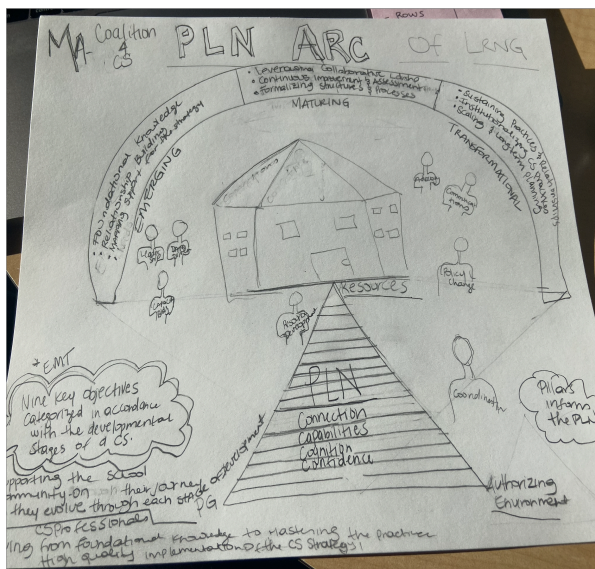
Appendix C
Internal/External Vetted Questions for Community Conversations

(Internal) Grounding Questions
What is the purpose of education?
What is your hope for Community Schools?
SWOT Internal Questions
1. What strengths of the organization supports this work? a. What might be some perceived strengths of the organization? b. What is done well? c. What are unique resources?
2. Where in the organization might there be need for improvement?
3. Consider external contributors: Where might there be possibilities to advance the organization? Increase, broaden, scale impact? What new policy offers positive implications?
4. What currently is or is anticipated to be a unique challenge to the organization?
(External) Grounding Questions
What is the purpose of education?
What is your hope for Community Schools?
Bolman and Deal-Aligned External Questions
1. How do you see your role/your organization's role in this movement?
2. Where might there be a lack of resources within the organization?
3. How can we ensure transparency and fairness in creation and implementation of processes?
4. What key elements or practices can we leverage to cultivate a collaborative environment?

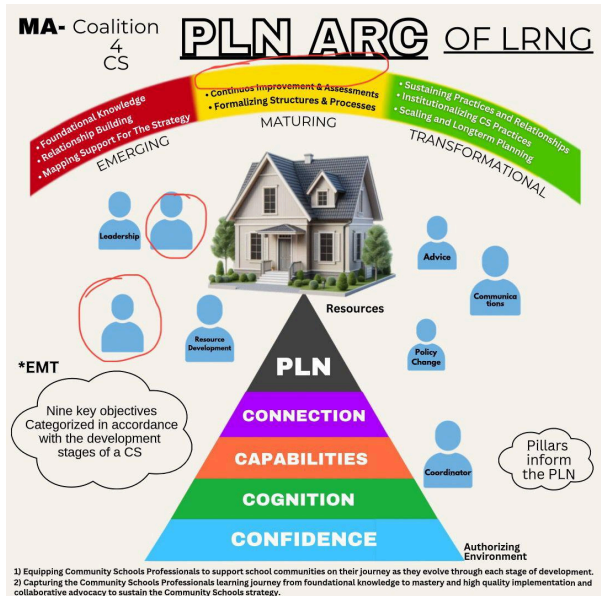
Appendix D

Iterative Versions of the Aligned Regional Competencies (ARC) of Learning and Leadership for Community Schools Professionals

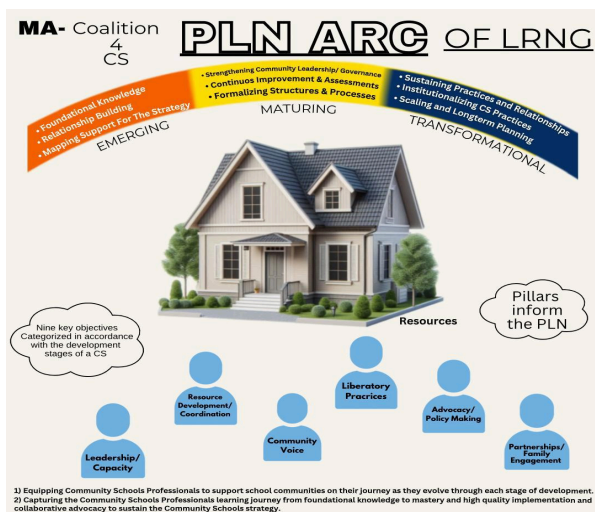
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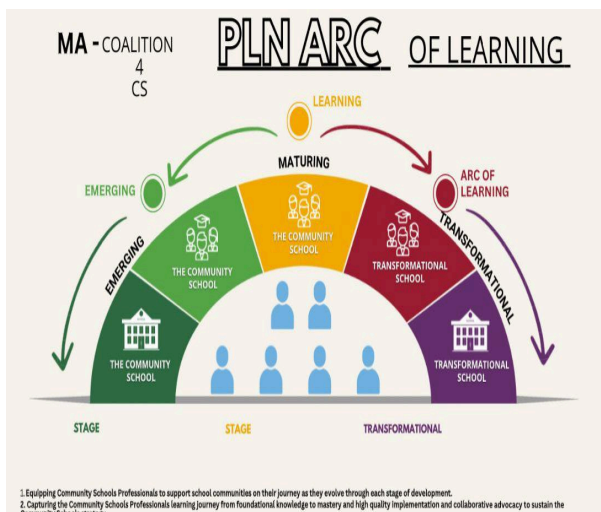
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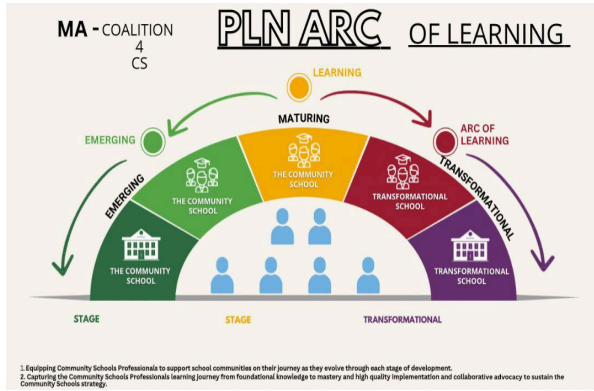
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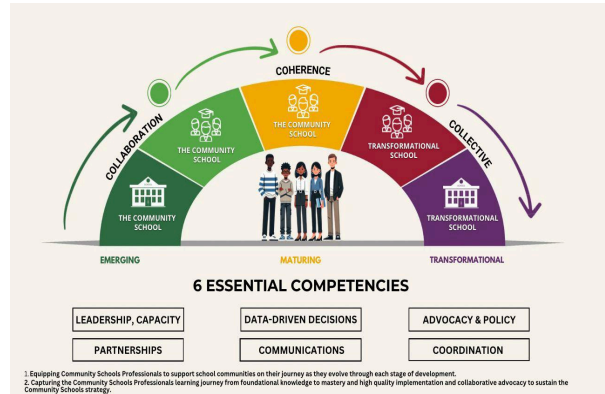
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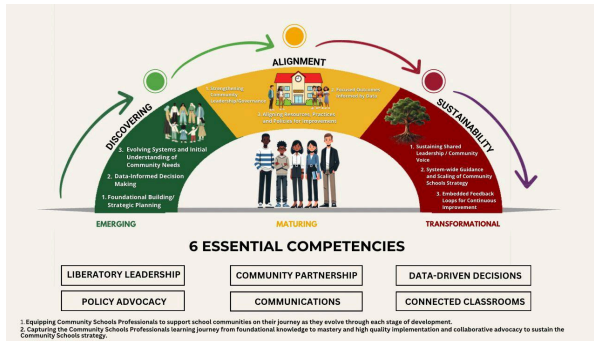
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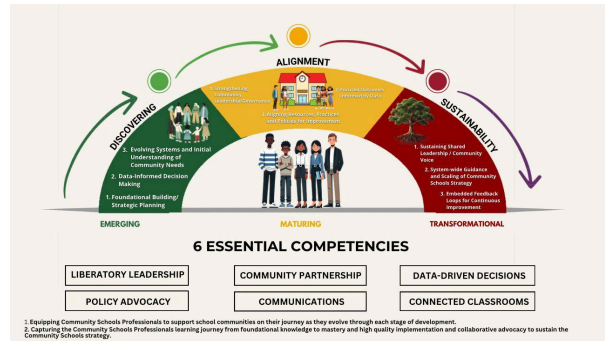
Version 6



Version 7



Version 8



Version 9



Version 10



Appendix E
Professional Learning Network (PLN)
Community School Directors (CSDs) Community School Coordinators (CSCs) Pilot Cycle 1

Cycle 1 – First Five Sessions			
Date	Focused competency	Focused skills	Session outcomes
October 15, 2024	Building strategic partnerships and cross-district collaboration	- Strengthening communication and relationship-building with diverse constituencies - Leading and participating in collaborative learning communities	CSDs/CSCs connect and engage in cross-district collaboration; forge a collaborative culture and new professional relationships
	Equity-driven leadership for community engagement and family partnership	- Strengthening culturally responsive leadership for diverse communities - Enhancing communication strategies to build trust with families	CSDs/CSCs depart with new knowledge to enhance their leadership and family engagement and practices
November 19, 2024	Equity-driven leadership for community engagement and family partnership	- Applying the dual capacity-building framework to strengthen family and community engagement - Utilize liberatory design practices to develop equity-centered decision-making	Introduce CSDs/CSCs to the dual capacity-building framework and liberatory design practices to enhance their leadership and equity-focused engagement strategies
	Data-driven decisions	- Map strategies, interventions, and supports based on data trends - Utilize data dashboards and visualization tools	CSDs/CSCs gain deeper understanding of key performance indicators, mapping interventions, and drafting logic models

		to effectively communicate findings	to enhance their data-informed practices
December 19, 2024	Equity-driven leadership and strategic planning	• Embedding dual capacity-building process conditions in development of goals and performance indicators • Design data-informed and equity-driven strategies for whole-school impact	• Participants gain deeper understanding of the Community Schools strategy's six key practices, dual capacity-building process conditions, and liberatory practices through development of performance indicators and goals aligned to their School Improvement Plan
	Leading for continuous improvement	• Analyze School Improvement Plan to determine trends, gaps, and strengths • Develop local performance indicators that align with community needs	• CSDs/CSCs will leverage their School Improvement Plan to inform local performance indicators and goal-setting
January 2025	Enhancing leadership effectiveness, capacity-building, and professional growth	• Strengthen shared problem-solving practices, procedures, and protocols	• Engage CSDs/CSCs in targeted support; ensure timely updates to revised Assets and Opportunities digital platform
January 21, 2025	Strategic communication	• Develop clear messaging strategies that align with Community Schools mission and six key practices • Strengthen storytelling techniques to spotlight the impact of	• Establish a streamlined system and process for collecting and sharing Community Schools updates to inform marketing and communications planning

		Community Schools	
	Strengthening advocacy	• Spotlight best practices • Strengthen public engagement with the community	• Identify CSDs/CSCs interested in being featured in UWMB's Changemakers series

Appendix F

PLN Areas of Inquiry and Survey Questions Questions/Purpose/Projected Measure

10/2/24

PLN_CSD/Cs Areas of Inquiry & Survey Questions

Please review the potential questions and select up to TWO from each category that aligns with our four pillars for supporting the Community School Directors in our region.

Pillar & Area of Inquiry	Potential Questions	Purpose	Projected Impact Measure
Integrated Student Supports	1. How familiar are you with the overall goals and responsibilities of a Community School Director (CSD)?	Assess familiarity with CSD roles and responsibilities	100% of CSDs indicating moderate to high familiarity
	2. To what extent do you feel equipped to recruit and convene community partners that align with the goals of the school?	Measure capacity to engage and align community partnerships	High confidence levels and reported examples of effective partnership recruitment
	3. What areas do you feel you need further development or training in to be more effective in your role as a CSD?	Identify specific areas where additional training or support is needed	Patterns in areas of need that can inform targeted professional development workshops/trainings
	4. How well do you understand your role in facilitating collaboration between school staff, families, and community partners to support student success?	Assess understanding of the collaborative role of the CSD	100% of CSDs indicating clear understanding and ability to articulate collaborative responsibilities
Expanded and Enriched Learning Time	1. How comfortable are you in utilizing data-driven inquiry and continuous improvement practices to support school outcomes?	Gauge comfort with using data for decision-making and problem-solving	Increased percentage of CSDs reporting comfort with data use; presence of data-driven initiatives and continuous improvement practices

	2. To what extent do you see your role as a CSD contributing to whole-child learning and development? 3. Which of the following topics would you prioritize for building your capacity? (e.g., Teacher and staff development, Data-driven decision-making, Building partnerships)	Assess recognition of the CSD's role in enhancing holistic student learning Identify priority areas for capacity building	100% of CSDs recognizing their role in whole-child learning and showing alignment with community school goals Identification of key topics for capacity building and professional development that align with community school strategy
Active Family and Community Engagement	1. What experience do you have working with school leadership teams or community partnerships in a similar role? 2. How familiar are you with restorative practices, culture-climate teams? 3. How familiar are you with the Dual Capacity Framework? 4. How would you describe the core principles of the community school strategy? 5. What types of support or resources would you like to receive from a network of CSDs? (e.g., Family engagement,	Determine previous experience with leadership and partnerships Assess familiarity with critical school practices that engage families and communities Assess familiarity with research-based practice that empower families Measure understanding of the foundational principles of the community school strategy Identify the types of resources and peer support needed to improve family and community engagement	High levels of experience reported, or specific needs for support highlighted High familiarity with restorative practices, or a clear plan to address gaps High familiarity with the DCF to inform support for parents and school staff Articulation of the core principles of the strategy in alignment with established community school frameworks Clear preference for types of support that reflect collaboration, problem-solving, and family engagement

	Problem-solving)		
Collaborative Leadership and Practices	1. How confident are you in your ability to facilitate partnerships and align efforts to support student success? 2. What benefits do you see in collaborating with other Community School Directors? 3. Would you be interested in participating in a regular peer network or community of practice with other CSDs? 4. How often do you currently collaborate with other CSDs to share best practices or troubleshoot challenges? 5. How important do you believe collaboration with other Community School Directors is for your success in this role? 6. How do you define the success of a community school, and what metrics would you use to measure progress? 7. How interested are you in receiving professional development or coaching to enhance your skills in leading a Community School? 8. How well prepared do you feel to lead and	Measure confidence in leadership and facilitation of partnerships Identify perceived benefits of peer collaboration Gauge interest in formalizing peer collaboration and learning opportunities Measure current frequency of collaboration among CSDs Gauge perception of the value of peer collaboration in the CSD role Assess how CSDs define success and evaluate progress in community school development Measure interest in professional development and capacity building	High levels of confidence or areas for development that can be addressed with targeted training Clearly defined benefits such as problem-solving, shared best practices, and professional growth High interest in participating in a network or community of practice; clear demand for peer-led learning structures Increased frequency of collaboration or expressed desire to increase opportunities for peer exchange Consistent attendance and collaboration; willingness to engage in peer networks and share resources Clear definitions and aligned metrics for measuring success that reflect community school goals High interest in coaching and development; commitment to ongoing learning and leadership improvement

	support the development of a community school at your current or future site?	Gauge preparedness to lead community school development	Increased levels of preparedness Identification of specific areas where more support is needed
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Appendix G
Modified CSD's/C's Essentials Skills and Competencies
Adapted from NCCS Essential Skills and Competencies for Community School Directors

Updated Version: 2/2/25. 5:18 PM

Original resource: Community School Coordinator Skill Set
National Center for Community Schools | Children's Aid

Modified by Phoebe Grant-Robinson
Essential Skills and Competencies aligned with the Community School Stages of Development:
Emerging, Maturing, and Transformational

Six Original Skills & Competencies:

1. Leadership and Capacity
2. Data-Driven Decision making
3. Advocacy and Policy Making
4. Communications
5. Resource Development and Coordination
6. Community [Family] Engagement and Coordination

Phoebe Added

7. *Cultural Competence and Equity-Driven Practices
8. *Community and Place-Based Learning

Further Revised & Aligned with the Table

Skills & Competencies:

1. Leadership and Capacity and Equity Driven Practices
2. Data-Driven Decision making
3. Advocacy and Policy Making
4. Partnerships: Community [Family] Engagement and Coordination
5. Communications, Resource Development and Collaboration
6. Coordination of Rigorous Community-Connected Classrooms

Appendix H
Modified & Consolidated CSD's/C's Essentials Skills and Competencies
Adapted from NCCS Essential Skills and Competencies for Community School Directors

Further Revised & Aligned with the Table

Skills & Competencies:

1. Leadership and Capacity and Equity Driven Practices
2. Data-Driven Decision making
3. Advocacy and Policy Making
4. Partnerships: Community [Family] Engagement and Coordination
5. Communications, Resource Development and Collaboration
6. Coordination of Rigorous Community-Connected Classrooms

Stage of Development (Introduction)	Essential Skills and Competencies for Community School Directors
Emergent Maturing Transformational	
Leadership, Capacity and Equity Driven Practices	
E M ▾	Co-create, hold, and articulate the Community School’s shared vision
E ▾	Facilitate the development of trusting relationships across the school (including with community partners)
M ▾	Share leadership with the school’s principal and leadership team
E M ▾	Identify and negotiate solutions to challenges
M T ▾	Respond and adapt to changing conditions
M T ▾	Foster a culturally affirming learning environment
Data -Driven Decision Making	
E ▾	Identify and access key data resources
E ▾	Lead the school’s annual needs and assets assessment
E M T ▾	Use data to respond to identified strengths and needs
M T ▾	Use data to focus on results and continuous improvement
M T ▾	Monitor and assess the impact of community-connected projects on student learning outcomes

M T ▾	Curate inclusive and collaborative learning experiences
<i>Advocacy and Policy Change</i>	
E M T ▾	Identify and engage key champions, including elected officials
E ▾	Communicate and demonstrate the value of the Community Schools strategy
E ▾	Center community's voice and lived experience
E ▾	Understand and celebrate students' diverse cultural backgrounds
<i>Partnerships: Community [Family] Engagement and Coordination</i>	
E M T ▾	Identify and build strong working relationships with needed community resources (Understanding the orgs. that are potential community partners)
E M T ▾	Build strong dual-capacity relationships with family
M T ▾	Build partnerships that enrich classroom experience with project-based learning
<i>Communications, Resource Development and Collaboration</i>	
M T ▾	Represent the community school in multiple forums
E ▾	Listen and respond actively to key constituencies
E ▾	Identify needs and opportunities
E M T ▾	Leverage, organize, and align school and community resources
M T ▾	Manage and align partners around agreed-upon results/goals
M T ▾	Develop and control expenses within, a site-based budget (based upon school context)
<i>Coordination of Rigorous Community-Connected Classrooms</i>	
E M T ▾	Organize community resources around student success
M T ▾	Create/Identify opportunities for teachers to integrate local community resources, organizations, and experts into the teaching and learning experience
M T ▾	Orchestrate fieldwork, service learning, project-based learning, or other experiential learning opportunities connected to the community

Appendix I
Meeting Summary: Professional Learning Network (PLN)
Subcommittee of Massachusetts Coalition for Community Schools

Date: January 31, 2025

Participants: AC, CK, KA, Phoebe Grant-Robinson, and SL

Recap:

We began by grounding ourselves and acknowledging the challenges our sites and communities were navigating in response to President Trump's recent Executive Orders and the broader political climate. Despite the option to reschedule, participants expressed hopeful sentiments and possibilities in the PLN and chose to proceed with the planned meeting.

Our discussion centered on four key objectives:

- Reviewing the Community Schools strategy and State Coalition
- Deepening understanding of the PLN function
- Clarifying subcommittee roles and expectations
- Establishing a regular meeting cadence

Participants shared insights on leveraging partnerships to address non-academic needs, hub schools, and holistic student and family support. The conversation underscored the importance of collaboration, shared learning, and resource allocation for Community School initiatives. There was general consensus that Friday is the most feasible day for future meetings.

Next Steps and Action Items:

- Strengthen our understanding of the PLN within the MA Coalition for Community Schools

- Continue discussions on enhancing student and family support systems
- Gather community feedback on the Model PLN ARC of Learning
- Schedule a calendar hold for Friday, February 28, 2025, 1–2 PM

Appendix J
UWMB Intermediary Meeting Agenda
November 7, 2024

MEETING OBJECTIVES

1. Define and Clarify the Role of the Intermediary: Establish a shared understanding of what the intermediary role entails within systems change, including responsibilities, expectations, and key outcomes.
2. Explore Practical Applications and Tools for Alignment: Identify tools and resources to support teams in aligning their work across departments, ensuring cohesiveness and continuity in how the intermediary role is communicated and enacted.
3. Build Trust and Cohesiveness Among Teams: Facilitate discussions that deepen trust, enhance collaboration, and reinforce the intermediary's role in uniting teams around shared goals and expectations, supporting a consistent approach and delivery of services.

AGENDA

10:30 AM to 10:35 AM

General Framing, Led by UWMB

UWMB introduces the IEL team and provides a high-level overview on why we are connecting.

10:35 AM to 10:47 AM

Introduction activity:

Utilizing concentric circles, participants will uplift the assets and strengths of United Way of Massachusetts Bay and why that is important.

10:47 AM to 11:02 AM

The Role of An Intermediary in System Change

After understanding the role of an intermediary, a.k.a. backbone organization, in systems change, participants will examine its functions, activities, and outcomes. Participants will also have the opportunity to learn how other United Ways are serving in this capacity.

Resources:

- Read pages 8-10:
<https://collectiveimpactforum.org/wp-content/uploads/2021/12/Backbone-Starter-Guide.pdf>
- https://www.fsg.org/wp-content/uploads/2021/08/Understanding_the_Value_of_Backbone_Organizations.pdf

11:02 AM to 11:25 AM

From Theory to Practice

In teams, participants will examine existing work and identify the ways in which UWMB is already functioning as an intermediary. In the spirit of continuous improvement, they will assess what's going well and opportunities for tighter alignment and growth.

11:25 AM to 11:45 AM

UWMB as an intermediary in Community School support

Using Community Schools as an example, participants will deepen their understanding of how UWMB is supporting Community Schools throughout the Commonwealth and how it's aligned to larger impact goals. As a collective, participants will assess current efforts and identify opportunities for deeper collaboration and alignment.

11:45 AM to 11:55 AM

Organizing for Success

Participants will identify where additional support is needed (function and skill) to effectively play their role within an intermediary. They will also be introduced to various tools and resources that can support their work.

11: 55 AM to 12:00 PM

Closing & Next steps