12-31-2021

The Boston Opportunity Agenda: A Historic Case Study of Public-Private Partnership in Education (2007-2019)

Timothy M. Lavin
University of Massachusetts Boston

THE BOSTON OPPORTUNITY AGENDA:

A HISTORIC CASE STUDY OF

PUBLIC-PRIVATE PARTNERSHIP IN EDUCATION (2007-2019)

A Dissertation Presented

by

Timothy M. Lavin

Submitted to the Office of Graduate Studies,
University of Massachusetts, Boston,
In partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

December 2021

Urban Education, Leadership, and Policy Studies Program

THE BOSTON OPPORTUNITY AGENDA:

A HISTORIC CASE STUDY OF

PUBLIC-PRIVATE PARTNERSHIP IN EDUCATION (2007-2019)

A Dissertation Presented

by

Timothy M. Lavin

Approved as to style and content by:

____

Wenfan Yan, Professor
Chairperson of Committee

____

Patricia Krueger-Henney, Associate Professor
Member

____

Jack Leonard, Professor
Member

____

Abiola Farinde-Wu, Program Director
Urban Education, Leadership, and Policy Studies Program

____

Tara Parker, Chairperson
Department of Leadership in Education

ABSTRACT

THE BOSTON OPPORTUNITY AGENDA:

A HISTORIC CASE STUDY OF

PUBLIC-PRIVATE PARTNERSHIP IN EDUCATION (2007-2019)

December 2021

Timothy M. Lavin B.A., Boston College
M.Ed., University of Massachusetts Boston
Ph.D., University of Massachusetts Boston

Directed by Professor Wenfan Yan

This historic case study studied the development of the Boston Opportunity Agenda (BOA), a public-private educational partnership, from 2007-2019. Despite significant prominence, influence, and investment from the partners involved, public-private educational partnerships in Boston have been understudied. The intention of this dissertation was to bring understanding of how this urban educational public-private partnership developed; the motivations of the partners to participate; the partner perceptions of the successes and challenges of the partnership; and the extent of the partnership's influence on the Boston Public Schools.

This case study utilized qualitative methods of document analysis and semi-structured interviews of partnership leaders to understand the BOA. To contextualize the findings, the data was examined through three lenses: a historic lens, reveals existing relationships with individuals and partners involved in the BOA as well as an understanding of how the BOA replicates, extends, or innovates from previous public-private educational partnerships in Boston; a motivational lens, utilizing a a spectrum of reasons for organization's motivation to partner (Barringer & Harrison, 2000; Cantor, 1990; and Siegel, 2010), provides understanding of why partners joined the partnership and how these motivations influence the partnership formation and partner experiences; and the collective impact model's conditions for success (Kania & Kramer, 2011) explain the BOA's structures and processes and the understanding of how the BOA replicates, extends, or innovates from this model.

The results of this study include a detailed account of the actors, decisions, and processes for the development of the partnership along with a deeper understanding of the motivations for partner members to participate. Partner perceptions of strengths were characterized by human capital conditions such as dedication, trust, appropriate staffing along with partnership processes for major initiative development while challenges largely resided in an array of financial constraints. Finally, partnership influence on the Boston Public Schools was observed, although partnership structures revealed some limitations to such influence. The development of the Boston Opportunity Agenda provides a menu of implications to foster partnership success along with a few caveats for current and future urban communities considering public-private educational partnerships.

DEDICATION

To my family, Lisa, Eleanor and Theo. You are the most important people in my life. Lisa, thank you for your unwavering encouragement and support. This paper has my name on it but it simply would not have happened without you. You are my biggest cheerleader. Thank you.

ACKNOWLEDGEMENTS

To Dr. Wenfan Yan who chaired this project. Your ability to clarify and help me make sense of the information and my own writing was critical. Without your insights and feedback, I might be still wading my way through the data. I can not thank you enough.

To Dr. Patricia Krueger-Henney who served as a reader on my committee and provided some key insights. Your feedback at the dissertation hearing and during the revision process was very thoughtful and resulted in valuable additions to the research. Thank you.

To Dr. Jack Leonard who served as a reader on my committee but truly was a constant source of support from the very origins of this project. Your consistent encouragement and support inspired me, especially in my moments of doubt. I am indebted to you for all of your guidance.

To the participants in this study who shared their time and insights. Your willingness to speak with me helped me understand the partnership and thus, write this paper. Thank you.

TABLE OF CONTENTS

CHAPTER Page

CHAPTER Page

CHAPTER Page

LIST OF FIGURES

LIST OF TABLES

CHAPTER 1

INTRODUCTION

The Boston Opportunity Agenda (BOA), a public-private educational partnership, was announced on June 22, 2010 to thunderous rounds of applause at the Frederick Pilot Middle School in Dorchester, Massachusetts as the most recent initiative for educational reform in the city of Boston. As students, staff, families, and other community members looked on, the Mayor of Boston, Thomas Menino; the superintendent of Boston Public Schools, Dr. Carol Johnson; Paul Grogan, President and CEO of the Boston Foundation; Robert Kraft, owner of the New England Patriots and leader of the Kraft Family Foundation, among other leaders from the partnering organizations, took turns at the microphone pledging their commitment to work collaboratively to improve the education of Boston residents along an entire cradle to career pipeline.

While the BOA's initial annual report card declared that, "it marks the first time that the City of Boston and the Boston Public Schools and the city's leading public charities and many of our foundations have come together to ensure all residents have access to the education necessary for the upward economic mobility, civic engagement, and lifelong learning for themselves and their families" (The Boston Opportunity Agenda Report Card, 2011, p. 5), many of the partners involved have a connection to previous educational partnerships with the Boston Public Schools (BPS). For people familiar with some of the history of Boston public education, the scene at the Frederick Pilot School may have seemed familiar. In fact, Boston Public Schools have been privileged with nearly forty years of partnership efforts to improve education for the students of the city. To fully understand the significance of the creation of the BOA, it is important to start back in the early 1980s with the formation of the original Boston Compact.

The Story of the Boston Compact

The Boston Compact was hailed as a pioneering partnership and so regarded that Walter Cronkite called it, “a ray of hope for Boston’s troubled schools” (as cited in Dooley, 1994, p.16). Announced in 1982, the nationally applauded initiative was a response by the business and education communities to address the issues of education and employment for Boston’s youth. The Compact was assembled by Bill Edgerly, the State Street Bank and Trust Company chairman and chair of the Boston Private Industry Council (PIC) and Robert “Bud” Spillane, then superintendent of schools, along with Robert Schwartz, Executive Director of the Compact and former education advisor to Mayor Kevin White. They, among others including: Jim Darr, Executive Director of PIC; Bill Spring, President of the Trilateral Council; and Paul Grogan, Deputy Director of the Neighborhood Development and Employment Agency, conceptualized the idea and were vital in gathering support from the various sectors in the city (Farrar, 1988; Farrar & Cipollone, 1988; The Boston Compact: An Operational Plan, 1982). The belief was that this innovative collaboration exemplified the kind of inter-organizational arrangement that could maximize improvements in education and stock the local job market with ready talent (Kantor, 1991). The compact consisted of reciprocal pledges by its participants towards a shared goal.

Specifically, the business community agreed to hire 400 June 1983 Boston Public School graduates into permanent jobs with the promise to increase this number of hires to 1,000 students, if they could meet entry level requirements, within two years. Secondly, these business leaders agreed to recruit, by 1984, three hundred companies to partake in a priority-hiring program for Boston graduates. Additionally, an existing summer jobs program would be expanded from 750 job placements to 1,000 by that same year. Finally, the business co-signers agreed to work collaboratively with PIC, (a private, non-profit organization established in 1979) to explore private sector initiatives in employment training. The goal was for PIC to extend its reach from three schools to six schools with the Jobs Collaborative, a school-to-work transition program (A History of the Boston Compact: 1982-1999; Farrar & Cipollone, 1988; Senate Hearing 100-502, 1987; Spring, 1987). Correspondingly, education leaders committed to improve absenteeism and dropout rates through a 5% reduction annually; to ensure that all high school graduates met increased academic standards, particularly in reading and math, by 1986; and to increase by 5% annually the number of graduates who matriculated in college or were employed.

Widely lauded, the early years of the Boston Compact were full of news reports on the subject. Scholars analyzed data, interviewed participants and developed conclusions. The Compact was a hot topic in the fields of education and educational research. But somewhat dramatically, the interest dried up. With each subsequent compact in 1989 (Compact II), 1994

(Compact III), and 2000 (Compact IV), there was less scholarly research on the subject. Gone was Cronkite on the national news.

Plans Shift

Originally, I intended to tell the story of Boston Compact IV. It was to be an examination about how this large public-private partnership developed, how it matured and declined; and what factors had influenced this development. I believed its story would bring new insights to the research on these types of educational partnerships. In essence, I anticipated writing the final chapter about a long and storied educational public-private partnership of the Boston Public Schools. This changed one afternoon.

"This is Richard Stutman, president of the Boston Teachers Union", the voice said on the other end of the phone line. I introduced myself and described my project idea about Boston Compact IV, its place in the legacy of the Compact and the lessons that might be learned from my research. While the acting Boston Teachers Union (BTU) president at the time, Ed Doherty, had signed the fourth edition of the Boston Compact in June 2000, Stutman had taken over the role of president in early 2003 and thus I believed he was a good place to start getting some background information as I developed my proposal. "I don't know anything about the Boston Compact. I literally couldn't even tell you thirty seconds worth of information", stated Stutman in response to my introduction. To say the least, I was surprised. Time to shift gears.

Having been a teacher in Boston Public Schools since 2001, I was aware of the lack of familiarity with the Compact at the classroom level during the early 2000s. However, I felt confident that leadership at the level of the BTU president, a group that was a signer of the Compact, would be fully informed. His response left me with more questions and helped to refine my research. If the Boston Compact's influence had diminished to the point where by 2003, less than three years after the signing of the fourth edition, the BTU president had basically no knowledge of the partnership, then what partners *were* working with Boston Public Schools during the 2010s? What were the motivations and experiences of these partners? How did the new partner organizations compare to the partners in the Boston Compact? How did the motivations compare? What was the influence of these new partnerships on the Boston Public Schools?

In short, I wanted to know the status of Boston Public School district partnerships and after some initial digging, I found myself watching a YouTube video of the announced launch of the BOA at the Frederick Douglas Pilot School. While the question of "what partners were now working with the Boston Public Schools?" was answered, lots of important questions remained.

Problem

Urban school districts nationwide face a seemingly endless stream of resource crises and reform efforts. Thus, it is common sense that educational leaders look for additional sources of support for their students in the form of partnerships. Businesses, along with universities and colleges, community organizations, philanthropic foundations, parents and parent groups, among others, are the targeted collaborators with school districts and individual schools. A scarcity of funds, a quest to connect classroom learning to real-world experiences, and the desire to vary and increase the number of experiential "exposures" for their students creates for many educators the desire to establish partnerships with external organizations (Hands, 2010; Sanders, 2001).

For urban school districts with their frequent resource deficiencies, the need for efficiency is essential. The support that these partnerships afford is critical in not only providing "the extras" for their students but also in helping to perform some of the base-line operational functions of a school district. These partnerships are literally a lifeline. Districts simply need to do more with less and in order to do so, they must adapt as their environment and the corresponding resources change (Hoy & Miskel, 2008). As a result of scarce resources, wise and strategic choices for all resource allocation are crucial. Partnerships provide access to additional resources that can bolster the school system's capacity to deliver services (Hands, 2005). The partnership's design is to leverage these additional resources in a manner that will improve the school district's ability to deliver services beyond what the district is able to do on its own. However, these partnerships aren't without cost to the district.

Upon entering into partnership, basic economic principles of trade off and opportunity cost are incurred. Simply put, a trade off is the exchange of one thing for another. In the case of partnerships, school districts commit and invest resources such as their time, energy, staff, and money in return for the additional resources that the external partner will provide. However, in making this trade off, an opportunity cost is created. Opportunity costs are the "things" that are missed out on as the result of the trade off. For example, if a school or school district is committing resources to one particular partnership, by definition, those resources cannot be used to support another partnership. It is this "other" partnership that is missed out on.

Clearly, Boston Public Schools has made the commitment of resources to establish a partnership with the BOA. Trade offs have been incurred as capital, time and energy have been invested in return for the support that the BOA provides to the education of the residents of Boston. In accepting the means of this partnership, Boston Public Schools forfeited the prospect of other partnerships. While opportunity costs associated with partnership often focus on financial resources (where else could the money, time, energy been applied) there is a wider spectrum. Forming partnerships of this type also involves opportunity costs in terms of vision and goals. For example, by adopting a partnership with the BOA, BPS is aligning itself with that partner's goals and vision for education. As a result, other goals and visions for education are not embraced. As such, this partnership impacts both the financial resources of the school district and its goals. This is a considerable investment and highlights the need for examination.

Thus, it is the premise of this study that if partnerships for urban school districts are beneficial and that these partnerships require considerable investment by all parties involved, we should be as fully informed about these partnerships as possible. For the city of Boston, there has been a lack of public record historically of the activities and outcomes in terms of their public-private partnerships in support of education particularly after the initial Boston

Compact in 1982. While the initial accord was thoroughly evaluated, each subsequent signing coincided with less account.

For the most current partnership, the BOA, the public record is mixed. While the partnership itself has produced *Annual Report Cards* nine times during its existence (in 2011, 2012, 2013, 2015, 2016, 2017, 2018, 2019, 2021) to inform the public in terms of the progress toward the partnership goals, there is an absence of detail in how the partnership operates, what motivates the individual partners to participate in this educational reform, and what is the exact influence of this organization. Beyond a list of partners and a brief description of its guiding principles and mission posted on the website, there is scant information about its nature. This limited account of the BOA partnership is problematic and the academic literature will be enriched with the addition of this information. Quite simply, no external party seems to be looking at it.

Theoretical/Conceptual Framework

While this introduction has centered on the perspective of the public schools, an inter-organizational partnership signifies a partnership between two or more parties. Thus, research into public-private educational partnerships needs to consider the perspectives of the external organizations as well. A more complete understanding of a partnership is only achieved with study of all partners involved and with a partnership as complex as the BOA, multiple lenses were needed.

To guide this study, the BOA was examined through three lenses: historic, motivational, and the collective impact model. Through these multiple frameworks, a more developed and complete understanding was achieved. First, a historic lens reveals existing relationships with individuals and partners involved in the BOA as well as an understanding of how the BOA replicates, extends, or innovates from previous public-private partnerships in Boston. Second, a motivational lens provides understanding of why partners joined the partnership and how these motivations influence the partnership formation and partner experiences. In this study, a spectrum of reasons for organization's motivation to partner (Barringer & Harrison, 2000; Cantor, 1990; and Siegel, 2010) were utilized. Finally, the collective impact model's conditions for success (Kania & Kramer, 2011) explain the BOA's structures and processes and the understanding of how the BOA replicates, extends, or innovates from this model. A more thorough discussion of these concepts and theory will be undertaken in the chapter two literature review.

Rationale

My rationale for a study of the BOA is fivefold. First, while there is a body of articles about inter-organizational relationships (Barringer & Harrison, 2000), there is a lack of information on inter-organizational partnerships in education, particularly the kind of specific details that would be illuminated in a case study project. Inter-organizational partnerships are complex organizations that are difficult to understand without a nuanced examination. The partnerships as their name implies include multiple organizations, often from varied industries; they have a variety of structures and working processes; the individual partners themselves have different cultures, and perhaps different motivations for partnership. Furthermore, inter-organizational partnerships have underlying issues of power; power of the organization as a whole within its environment as well as power issues between individual partners within the inter-organizational partnership itself. With such complexity, a close analysis is required.

Secondly, Boston is an excellent city to examine as its public school district has a history of these types of partnership, most prominently the Boston Compact in 1982, and its subsequent evolutions; the creation of the Boston Plan for Excellence (BPE) in 1984; and now the BOA established in 2010. The Boston Compact, as introduced earlier, began with strong corporate involvement in what constituted a jobs program. Over the course of time, additional partners like the Boston Teachers Union (BTU), the Higher Educational Partnership (area universities and colleges), the Boston Human Services Coalition and the Boston Cultural Partnership, were added as the scope of the Compact expanded. Absent from its partnering membership are the foundations and philanthropic organizations now so prevalent in support of the BOA. This study investigated the “new” Boston Public School partnership – the BOA and examined the connection to its predecessors as it represents a shift in the type of partner from previous alliances. Third, the nature and magnitude of the BOA made this partnership worth investigating. The research clarifies the creation and practices of the BOA. As such, the account of the partnership offers some practical suggestions and warnings that inform policy for the development of other large-scale public-private educational partnerships. Fourth, the years from 2000 (the era of Boston Compact IV) to the present and the existence of the BOA are largely absent from scholarly research so this study helps fill that vacuum. Although there are some instances of an examination of city schools and partnership involving Boston from the 1990s (Portz, Stein & Jones, 1999), this research will add a more contemporary case to the literature.

Finally, while the BOA is a local partnership, there is a national conversation in education about the involvement of external organizations in public education and the resulting privatization of public schooling. In cases of New Orleans, Chicago, and Philadelphia, among others, questions have been raised about the repercussions of this involvement (Buras, 2011; Gold, Simon, Cucchiara, Mitchell & Riffer, 2007; Lipman & Haines, 2007). While no assumptions were made in regards to the BOA, amidst this climate of privatization, a close look at any big city partnership seemed merited.

In summary, my intention of this research is to offer the findings of the BOA formation, partner experience and influence as an example of how public-private educational partnerships develop. My belief is that these discoveries are of service to existing public-private partnerships but also communities considering their development.

Research Questions

The purposes of my historic case study of the BOA were to discover the process and motivation for the formation of the partnership along with the partner experiences from the years of 2007-2019. My research addressed the following questions:

- How did the partners develop the Boston Opportunity Agenda partnership from 2007-2019?
- Why did the partners join the Boston Opportunity Agenda partnership?

- What are the partner's perceptions about the strengths and challenges of the partnership?
- What is the influence of the Boston Opportunity Agenda on Boston Public Schools?

The BOA partnership continues to this day (2021), though the research centers on the earlier years of its existence. While these research questions are for a singular case, the findings are contextualized in the history of partnership in Boston and generalizable lessons learned are shared.

Definition of Terms

It is noted up front that descriptors for these educational partnerships vary throughout the literature. In this paper, the term "inter-organizational partnership" is used to broadly describe any partnership "representing collaborations between distinct and autonomous organizations"" (Ungureanu et al., 2020, p. 172). For example, a school district partnering with a local community college or an individual school partnering with a parent group or local arts consortium. Within this framework of inter-organizational partnerships, the term "public-private partnership" is positioned, which again entails partnership between two or more organizations but specifically involves public and private organizations. An example would be a school district (public) partnering with a corporation (private) or in the discussion of this paper, a school district (public) partnering with philanthropic foundations (private). For clarity, all public-private partnerships are inter-organizational but not all inter-organizational partnerships are public-private. For both of these partnership types, the organizations that partner with the schools are termed "external" partners, denoting that the organization exists outside and separate to the school district. Finally, in this paper, the term "large scale" partnerships signifies a partnership consisting of multiple organizations larger in scope than that of a single-school and single external partner.

Methodology

In order to answer these research questions, I have conducted a historic case study of the BOA. This strategy is particularly effective when attempting to answer "how" or "why" questions and focuses on a contemporary phenomenon in a real life context where the boundary between the context and phenomenon is not clearly defined (Yin, 1989). In order to investigate this case, I engaged in a two-phase process, which I summarize here but present in further detail in chapter three.

The first phase of the research involved engaging in extensive documental research. I utilized a variety of sources in order to gain an understanding of the BOA. Some examples of sources are the Boston Opportunity Agenda Annual Report Cards and other publications; the websites and reports of BOA initiatives; and the archives from the two principal newspapers in the city of Boston – the Boston Globe and the Boston Herald as well as other local newspapers. Additionally, I examined periodicals such as the Boston Business Journal, the Boston Municipal Research Bureau, and Commonwealth Magazine. Furthermore, documents and reports from the city of Boston's mayoral office and the Boston Public School Committee, were gleaned for information. Finally, the websites, public reports, research, and tax returns from the partners involved in the BOA were studied closely.

Secondly, I conducted a series of 16 interviews of BOA partners to learn about their experiences and perspectives. The BOA has three primary types of partners: core partners (typically represented on the BOA board), investor and philanthropic partners, and community partners. The former provides partnership leadership along with the financial and human resources to support BOA initiatives while the latter two align their investment and programming with those BOA initiatives. I targeted the leaders of the founding core partners for my initial round of interviews.

My rationale for interviewing these individuals was two-fold. First, these leaders were very well informed of the motivation for partnering, the operations, and the decision making of the partnership. In fact, one of the tenets of the BOA is that CEO level participation be present from its partnering organizations. While not all leaders were accessible for interview, I began the interview phase with these leaders and employed a "snowball technique" which involved me asking these leaders for additional interview candidates. This technique elicited suggestions to interview some leaders of philanthropic and community partners of the BOA. While these leaders were generally less knowledgeable about the original creation of the partnership, their organizations have agreed to align their funding and programming with Opportunity Agenda initiatives. Thus, they were familiar with some of the operations of the partnership. Finally, these community partners have a different perspective on the partnership than the core partners and investors and as such, helped to provide a more nuanced understanding.

Essential to an effective case study is the gathering of detailed information from a multitude of sources (Yin, 1989). By doing this, I believe that I arrived at information that is accurate, detailed and textured. With such information, this case study brings to light the BOA and the present state of partnership in the city of Boston.

Positionality Statement

Both my professional experiences and background influenced my views on my area of study: the BOA, a public-private educational partnership. My interest in conducting this study stemmed from both my personal and professional backgrounds. As a history major at Boston College, I have always been intrigued with learning about how past events affect the present and even more fascinated with understanding the "how and why" of the people involved in these historic events. Thus, historical research and the knowledge gained through its study has been of interest to me.

Having graduated from undergraduate college and a subsequent completion of a Masters of Education degree, I entered the teaching profession in the Boston Public Schools (BPS). While initially a history teacher, personnel shifts at the school necessitated a shift toward teaching classes in an emerging business program after. Thus, these business classes have been my primary focus during the last twenty years of teaching. One of my roles from the earliest years was to coordinate school-business partnerships for my business classes.
In these partnerships, I observed great success for the students involved in the form of job readiness skills, field trips, internships, and scholarships. I also recognized the limitations of these single school partnerships in terms of the narrow number of students benefiting from

the partnership but also the reliance on one or two representatives from the partner organizations. For example, if the “point-person” from the business transitioned to another company, the partnership often dissolved. The same process occurred when I accepted a teacher position at another BPS school - the partnership dissipated. These limitations catalyzed my interest in larger, more complex school partnerships with the potential to benefit much larger swaths of students. I began to examine the public-private partnership in the Boston area and became increasingly interested in the Boston Compact, a historic partnership originating in the 1980 as it matched my focus in terms of magnitude and complexity. This interest ultimately resulted in the research of the Boston Opportunity Agenda.

Additionally, my identity shapes my interaction with and interpretation of partnerships. I am a white male of Irish descent who attended Boston College and has worked as a business teacher in the Boston Public Schools for more than 20 years. The positional privilege imparted on me as a white college educated male eased my entry into the partnership spaces during interviews and provided me comfort speaking and interacting with partner leaders in positions of power. Correspondingly, the interviewed partnership participants’ familiarity with people of my background likely resulted in a comfort with my presence and a willingness to be forthcoming and share their insights. Researchers of backgrounds other than white male may not have felt the same comfort nor been afforded the same forthcoming reception.

These experiences had influence on this study's design, the comfort level of its interview participants, and how I interpreted the data discovered. My intention of these statements here are to mitigate these biases through the recognition of this positionality.

Summary

At the public announcement of the formation of the BOA in 2010, the partners brimmed with enthusiasm for the future of education in Boston. It was with this same earnest belief that partners could help reform education in the city of Boston that the school department collaborated with the businesses and universities to form the Boston Compact and officially sign it into existence in 1982. Today, nearly 40 years removed from the signing of that storied partnership which was revamped three additional times (1989, 1994, 2000) before being phased out; amidst leadership changes, and shifts in policies and practices both locally and nationally, Boston trumpets another educational partnership for its residents: The Boston Opportunity Agenda.

CHAPTER 2

REVIEW OF THE LITERATURE

Introduction

In order to deepen my understanding of the BOA partnership and to better position myself to answer the research questions, I completed a review of relevant literature. The review in this chapter focuses on three bodies of literature. The first section is a review of the history of large public-private educational partnerships in the city of Boston during the three decades leading up to the creation of the BOA. These partnerships were primarily the Boston Compact and the Boston Plan for Excellence. This body of research introduced me to the processes, actors and outcomes of these previous partnerships. This review illuminates the intricacies of the local educational partnership landscape in Boston, uncovers previous relationships between partners, and provides the historical context to the current state of partnership with the Boston Public Schools. They formed the foundation for the establishment of the BOA in 2010 and its current work.

The second section describes a selection of other prominent inter-organizational educational partnerships throughout the United States. Literature in this area crystallized for me, common structures and practices of public-private partnership nationally. While there are a vast array of educational partnerships of all sizes, I focused specifically on the LA Compact, as it’s creation was influenced by the Boston Compacts and the StrivePartnership of Cincinnati, whose creation timeline was similar to the BOA and which BOA leadership was in communication. Additionally, I review the Strivetogether “Cradle to Career Network”, which emerged from the original StrivePartnership, of which the BOA is a member. A discussion of the collective impact model, a central principle of the Cradle to Career network, and conditions attributed to its success, is included. Following, there is a review of some literature on general philanthropic trends from the time of the BOA launch, 2010-2013, to learn how consistent the activities of the BOA were in comparison. This review helps explain how the BOA fits within the larger context of partnership across the nation. Finally, a brief discussion of the dissent towards external agencies' involvement in public education is included, with examples from New Orleans and Chicago to illustrate the critique.

Lastly, the third section analyzes the literature on the motivation for partners to create inter-organizational partnership (Barringer & Harrison, 2000; Cantor, 1990; Siegel, 2010). This section provides the framework for the part of this research project which explains how and why the BOA was developed and the experiences of its partner members.

Section I: A Historical Review of Boston Public School Partnerships

In this historical review of Boston Public School partnerships, I focus specifically on two prominent educational partnerships: the Boston Compact and the Boston Plan for Excellence. Due to the imbalance of literature mentioned in chapter one, the bulk of the review focuses on the history leading up to the original Boston Compact as well as the details of Boston Compact I and its evaluation. This review is divided into six sections and presented roughly in chronological order: (1) The Historical Background and Events Leading

Up to Compact I; (2) Boston Compact I; (3) The Boston Plan for Excellence; (4) Boston Compact II; (5) Boston Compact III; (6) and Boston Compact IV. Finally, these sections summarizing the facts around the respective partnerships will be supported by a review of the existing literature as well as my analysis.

Historical Background and Events Leading Up to the Boston Compact

Context

While the Boston Compact was at the forefront of an educational partnership movement in 1982, the era clearly fostered the proliferation of partnerships nationwide. Ignited by the publication of *A Nation at Risk* in 1983 by the National Commission on Excellence in Education, the state of public education had come under the scrutiny of the general American public in the years after the signing of the original compact. As such, businesses, in addition to leaders of community organizations and parents, elevated their interest and participation in the school system. This time period of the 1980s and early 1990s were fertile for the creation of school-business partnerships. According to the National Alliance for Business, more than 140,000 one-to-one business to school or school system partnerships were established nationally during that time period. Indeed, by 1991, the National Association of Partners in Education (NAPE) estimated that 51% of the 16,000 school districts in the United States were involved in some form of partnership program. Further statistics from NAPE exemplify how elaborate and extensive (the depth) the involvement of partnerships were in public schools: 29.7 million students or 65% of the total number of students were matriculating in schools with existing partnerships (Waddock, 1995).

Local History

While announced to great acclaim both locally and in the national press, the origins of the Boston Compact lay in the confluence of events over the previous decades. In fact, the business involvement in public schools would have been accurately described as limited, 20 and 30 years prior. The general lack of business support in the 1950s and early 1960s has been documented due to the perceived resistance to change by the Boston Public School system. However, there were pockets of support: the New England Mutual Life Insurance Company's collaboration with Boston school administrators, New England Telephone's developing work study opportunities with Dorchester High School, The New England Merchants Bank and Polaroid's offer to aid Boston Public School's curriculum and community relations departments – all were in existence prior to the desegregation orders of Judge W. Arthur Garrity, Jr. of the mid-1970s (Cronin, 1991).

Other participation in civic engagement had begun in 1959, when the Coordinating Committee, originally consisting of 14 leading businessmen, initiated their involvement in urban reform. While the Vault, as it was more commonly known, primarily focused on economic issues in the city, their network did grow to include non-business organizations such as educational institutions. The existence of the Vault demonstrated a commitment of prominent members of society taking a vested interest in not only their own economic prosperity, but also the well being of Boston as a community. However in the early years of its existence, the Vault's interest and impact within educational reform was, in fact, muted as Boston Public Schools operated outside the influence of city hall, where the Vault's presence was most acutely felt (Portz, Stein & Jones, 1999).

The next phase of industry involvement with public schools would be mandated following Boston Public School's failure to comply with the Massachusetts Racial Imbalance Act of 1965. Beginning in 1974, Judge Garrity issued over 400 orders concerning public school matters including, but not exclusive to, student assignments, school closings, personnel hires and community partnerships. While the court orders lasted over a decade, Garrity's second phase, announced in 1975, included a plan that created 20 partnerships between Boston schools and area colleges as well as 20 business-school partnerships (Waddock & Post, 1991). These partnerships would be crucial in the establishment of the Boston Compact, particularly in the early planning stages.

These business partnerships had been introduced in 1974 by the Boston Trilateral Council for Quality Education, which was an organization established by the Boston Chamber of Commerce and the National Alliance of Businessmen along with the school department (Portz, Stein & Jones, 1999). The Boston Chamber of Commerce had a history of working along with the Vault, who under the influence of chairman William Edgerly, would be early signers of the Boston Compact. Edgerly's leadership and involvement with the Private Industry Council (PIC) pushed other Vault members to make public education reform a priority initiative for the group (Waddock & Post, 1991). Thus, while education may not have been at the forefront of the reform agenda during the early years, key connections between civic leaders were made and relationships were formed. This network of people would later be instrumental in galvanizing support for the Boston Compact.

National Policies

Concurrently, actions at the federal level were creating an atmosphere of collaboration between private industry and education. The Job Training Partnership Act (JTPA), which replaced the Comprehensive Employment and Training Act (CETA) in 1982, designated cooperation between the public sector and businesses for the purpose of job training for the disadvantaged. Additionally, the act established Private Industry Councils (PIC) to direct federal funds for the job training. In Boston's case, a PIC had been independently created and thus was already in place with the passage of the JTPA. This convergence of events indicated that the model of public-private partnerships was becoming prevalent in the years preceding the original compact (Waddock, 1995). PIC would later be a key player in the management and coordination of the Boston Compact and would be led by top private business executives such as the previously mentioned Bill Edgerly (State Street Bank), as well as John Larkin Thompson (Blue Cross/Blue Shield) and Frank Morris (Federal Reserve Bank) (Cronin, 1991).

Finally, in the beginning of the 1980s, the outlook of economic prosperity in the city necessitated a growing body of workers with minimum basic academic skills and self-discipline for entry-level work as well as additional jobs that would be achievable only through higher education (The Boston Compact: An Operational Plan, 1982). All of these factors combined – a public perception that public schools needed radical intervention to survive and succeed; a local history of civic engagement that, while limited, fostered familiarity among city leaders; mandated business and university partnerships with schools; exposure to and trust in PIC's capacity to effectively coordinate and place Boston youth in jobs through the summer employment program; and a growing job market that demanded an increased number of qualified applicants – created a foundation for the Boston Compact.

Planning the Compact

In order for the Boston Compact to evolve from idea to reality, extensive planning was required to coordinate the multitude of stakeholders involved in the work (Spring, 1987). To that end, the school department developed a 106-page document titled *The Boston Compact: An Operational Plan for Expanded Partnerships with the Boston Public Schools* that identified, from the school and business sides, all of the steps necessary to ensure that the schools fulfilled their promises of increased academic performance and the business created the employment opportunities for Boston youth. The operational plan provided an account of the early planning stages of the Compact beginning with a memorandum sent by Superintendent Robert Spillane in May of 1982 to the leaders of business and university and the subsequent "Compact Planning Group" that was charged with formalizing the plans for mid-September of that same year.   While the plan included initial reports from eleven working groups that had been established (job development, counseling, alternative education, remedial education, arts, athletics, curriculum development, career and vocational education, computer literacy, research and evaluation, and school management assistance), it was noted, "…that these topics do not exhaust the range of ingredients for effective school improvement. We expect that as the 1982-83 school year progresses, there will be additions as well as re-arrangements" (p.57).

The operational plan clearly recognized that in engaging in this design, there would be some necessary adjustments as the work proceeded. The early planners also acknowledged that they were in the early stages of development and that some limitations to the plan existed at that point (September 1982) in terms of logistics and scope. "We have yet to give full consideration to how the Compact will integrate its proposed activities with School Department initiatives in the middle and elementary schools. The Boston Compact at this point should be viewed as one part of a larger effort to improve all Boston schools. Obviously, substantial consultation and planning must proceed throughout this school year if the Compact is to become a credible force in 1983-84. In this sense, the Operational Plan is an open invitation to concerned citizens of Boston to roll up their sleeves and join in" (p. 5).

Boston Compact One: 1982

In 1982, business leaders, BPS superintendent Robert Spillane and Boston Mayor Kevin White, announced triumphantly the mutual promises they had made in establishing the inaugural accord: promises of guaranteed jobs for Boston Public School graduates and promises of improved academic outcomes – improved test scores and attendance rates coupled with a lower dropout rate. As discussed, the pact detailed specific targets for each corresponding part. For example, businesses would hire 400 graduates in 1983 with guarantees that the number would grow to 1000 Boston Public School students in subsequent years. The school district agreed to improve attendance by 5% annually and to increase by

5% math and reading test scores (A History of the Boston Compact 1982-1999; Farrar & Cipollone, 1988; Spring, 1987). The specificity of the goals was viewed as a tool for increased accountability. Ousted were vague assurances of "general improvement" and "increased employment opportunities." The Boston Compact would be a partnership where outcomes could be clearly measured due to the concrete goals set forth.

Within two years, the as well as the Boston Trades Union Council as well as the Boston Higher Education Partnership joined these original signers and made pledges of their own. The trades council promised to designate 5% of its apprenticeship positions annually for qualified BPS graduates while higher education made several commitments as part of the compact. First, 25 Boston area colleges and universities agreed to increase the number of enrolled students from Boston Public Schools by 25% within 6 years. Additionally, these local institutions of higher education would assist the high schools to develop a more rigorous, college preparatory curriculum. Finally, the colleges arranged to increase financial aid for Boston youth and support them so that they remained in college (Farrar, 1988; Farrar & Cipollone, 1988; Senate Hearing 100-502, 1987; Spring, 1987).

Support for the Compact

Support, both direct and indirect, for the Boston Compact was prevalent during the 1980s. In 1983, in addition to the already mentioned, *A Nation at Risk*, the publication of the National Science Board's *Educating Americans for the 21st Century* highlighted the lack of preparation and readiness of public high school graduates to compete in a technologically driven era. One of the conclusions drawn by the National Science Board was that "local school boards foster partnerships between the school board, administrators, local officials, business and industry, labor leaders and parents in order to facilitate constructive change" in order to advance education. Additionally, in 1985, the Committee on Economic Development produced a report titled *Investing in Our Children*, which describes the Boston Compact as a "clearly focused strategy to increase employability" and encouraged the involvement in education by leaders in business through collaborative partnership (as cited by Cronin, 1991, p. 5).

Program components may also have helped garner support. The Compact's insistence that aid be coupled with accountability may have appealed to a broad spectrum of constituents within the Boston area. This "mutual obligation" as described by Nathan (1989) permitted for both liberals and conservatives to come to an accord in support of the partnership; disadvantaged youth would receive targeted support for their performance in their public schools and receive assistance in gaining employment and college access but only as the result of their academic industry.

Thirdly, the basis of The Compact – the use of incentives to encourage academic performance – was well regarded at the time. There was a general consensus that the promise of jobs after graduation would spur high school students into action, particularly the disadvantaged youth, who were familiar with unemployment; thus the plan was perceived as logical and promising (Raywid, 1987).

Finally, the Boston Compact was perceived as a model of strong ties between schools and private industry and, therefore, a candidate to be replicated in other cities (Woodside, 1986). In fact, The National Alliance of Business (NAB) would launch in 1986 what would ultimately be a 12-city post-high school promise of jobs program, using Boston's plan as a blueprint. Funded by the United States Departments of Labor as well as Health and Human Services, among other sources, the Compact Replication Project was initiated in Albuquerque, Cincinnati, Indianapolis, Louisville, Memphis, San Diego, Seattle, Detroit, Miami/Dade County, Pittsburgh, Providence and Rochester (Employment and Training Administration, 1989; National Alliance of Business, 1989). Supporters believed that the principles and successes of the Compact would translate nationally.

Results of Boston Compact One

In the following years, the Boston Compact was widely studied (An Overview of the Boston Compact: 1982-2010; Cronin, 1991; Employment and Training Administration, 1989; Farrar, 1988; Farrar & Cipollone, 1988; Hargroves, 1983, 1986, 1987; Hartley, 1992; MacDowell, 1989; Mossberger & Wolman, 2003; Murray-Nettles, 1991; Portz, Stein & Jones, 1999; Rosenbaum & Kariya, 1991; Rosenbaum, Kariya, Settersten, & Maier, 1990; Rothman, 1988; Waddock, 1992, 1993, 1995). Within three years, the Compact was a national hit; numerous complimentary articles were written, visitors came to Boston to learn from its success, and several cities engaged in a process of replication (Cronin, 1989; Farrar, 1988; National Business Alliance, 1989). The preliminary goals were for the most part met.

Business. Particularly, the business side could lay claim to vast success. They had promised 300 businesses would participate; they had delivered over 500 by 1984. The Summer Jobs Program had pledged that 200 companies would provide 750 jobs in 1982 and

1,000 the following year. In the summer of 1986, six hundred fourteen Boston businesses hired 2,591. In regards to PIC's year round Job Collaborative Program, the goal was to expand from three schools to six – the businesses had job developers in 12 schools by 1985. Even the goal that was not met, the promise to hire 1,000 graduates in 1985 (they hired 823), was not met simply due to the lack of demand. As a matter of fact, they had placed all the graduating students that wanted a job (Farrar, 1988; Farrar & Cipollone, 1988; Kolberg, 1987).

Previously, a 1983 follow up study by Jeannette Hargroves provided some early, but in depth, insight into the Compact's effectiveness. Hargroves, in her role in the Community Affairs Department at the Federal Reserve Bank of Boston, followed up with 1982 BPS graduates seven months later to learn what they were doing. A random sample of students, 505 students (15%) of the graduating class of 1982, was sent letters explaining the purpose of the survey. Subsequently, Boston Public Schools' Student Advisory Council and School Volunteers of Boston conducted telephone interviews in both English and Spanish. The respondents were asked what they were doing at the time that the survey was conducted and based on their responses (attending school, working, etc), a series of follow-up questions were administered (Hargroves, 1983, p. 5).

Her study indicated that over one-quarter of respondents (29%) were enrolled in higher education exclusively; 28% were employed exclusively; and 19% were engaged in both school and work. While nearly half of the graduates were working, the remaining graduates were either looking for work, unable to work, in the military, or in special programs. In total, of the graduates in the labor force, 80% were employed (Hargroves, 1983, p.6).

While these positive statistics seem to corroborate the early effectiveness of the Compact, Hargroves offered several reasons for pause. First, there were some limitations to her survey sample. The respondents included a statistically significant higher proportion of whites and Asians and fewer African-Americans and Latinos than the entire class of 1982 contained. Secondly, the difference in the number of males, particularly white and Asian, as compared to the whole was also significant statistically. Finally, while not statistically significant, the survey sample had a larger representation (24%) from the exam schools than the graduating class (19%). A final concern of the study was non-response bias. In the study, the response rate was 60% and thus the large percentage (40%) of non-respondents was a source of worry.

The researcher did take steps to alleviate these concerns. In order to rectify the underrepresentation of African-Americans and Latinos and district school students, a weighted computation formula was applied as appropriate. Also, attempts were made to determine if the non-response group differed significantly from the survey respondent sample. A comparison of respondent and non-respondent's GPA and attendance rate, two potential indicators of future employment and education success, was conducted. In this case, the two groups indicated very little difference (2.5 GPA and 19 days absent for respondents, 2.4 GPA and 22 days absent for non-respondents). However, Hargroves also used the possession of a telephone as an indicator of higher socio-economic status (and the presumed correlation of increased opportunities in education and employment) to determine if there was a difference between these same groups. In that case, 25% percent of non-respondents did not have a phone versus only 4% of survey respondents. As the author concluded, this difference may indicate a bias towards higher socio-economic status levels.

Finally, a closer examination of the manner in which the graduates found employment and the types of jobs they held, might offer further critique of the original Compact. From the survey, results showed that roughly 75% of the working respondents had found jobs through friends and relatives or on their own and that only slightly over 20% had relied on school. These responses seem to counter the Compact's claim that PIC had placed the graduating class in jobs. However, within the group of African American females, nearly 50% found their jobs through school, which may substantiate some of the Compact's goal to support disadvantaged youth (Hargroves, 1983, Chart 9, p. 27).

Schools. During the same time period, the schools had more mixed results. In 1982, the school department had assured businesses that they would improve annually in the areas of school attendance, dropout rate, and college and job placement. Additionally, Boston Public Schools declared that its graduates would have demonstrated increased reading and math aptitude by 1986. While not reaching the Compact promise, the attendance rate did indeed increase over the first two years, reaching 84.5% in 1985 up from 80.7% in 1983. Academically, some improvement was seen as well. Scores on the Metropolitan Achievement Test rose from a median percentile of 38% in reading and 35% in math in 1983 to 45% and 47% respectively in 1985.

One area of concern was the dropout rate. While there was no agreed upon measurement of the statistics, by looking at cohorts in Boston who left school (without transferring to another school or entering the military), the data indicated that the dropout rate was actually getting worse. Prior to the Compact, the rate for the class of 1981 had been 36%. For the class of 1984, that rate had risen to 43% as the result of incremental increases within the three years (Farrar, 1988; Farrar & Cipollone, 1988; Hargroves, 1986, 1987; Murray-Nettles, 1991).

Criticism of Boston Compact One

Several reasons have been posited concerning the limited success of the Compact, particularly on the dropout issue. Scholars have questioned the premise- "jobs in exchange for school attendance and performance" of the Boston Compact and point to research that demonstrated that guaranteed jobs does not impact dropout rates (Hahn & Lerman, 1985 as referenced by Hargroves, 1986, p. 209). Sandra Waddock (1995) also lended support to this interpretation. In her analysis, a hindrance of the Compact in regards to dropouts was that it was an illustration of an overly simplistic programmatic solution to what she describes as a systems problem. In assessing the dropout rate, the founders felt that the lack of access to jobs was a central cause of the dropout rate, thus the creation of the Compact. In Waddock's view, the Compact was a jobs program that was designed to entice students to improve their academic performance. In essence, this promise of a job would be the necessary motivation for a student to progress in school.

Waddock's critique of the program points out that this model failed to demonstrate a thorough understanding of the root of the students' poor performance. This jobs program failed to account for the lack of comprehension by the student in regards to the job market; and the lack of role models to illustrate the connection between school performance and employment success. Finally, the long history of academic failures for the students and the lack of support from families for academic success were not fully considered (Waddock, 1995). In her eyes, improved academic performance in school is the result of an improved and productive life *outside* of school and the Boston Compact failed to encompass that life.

A second explanation rationalized the limitations of the Compact's impact on dropouts by considering the hiring practices of businesses in the United States. Even though PIC provides a resource within schools for students looking for a job, which is generally an exception in the United States, most businesses do not use measurements of academic performance (grades and attendance) in hiring decisions and high school grades have, at best, a weak correlation with early wages or entry to higher-status jobs (Rosenbaum & Kariya, 1991). In their article, *Do School Achievements Affect the Early Jobs of High School Graduates in the United States and Japan?*, the authors asked the question: "If employers want better academic skills, why do they not use school evaluations of academic skills (school grades) when they assign youths to jobs?" (p. 79). Thus, in their opinion, a shortcoming of the Boston Compact was that while it provided schools and businesses with incentives for improved achievement it did not provide an incentive for students to improve performance beyond the minimum to graduate. Additionally, unlike in Japan, which they used as a comparison in their study, grades weren't used as an evaluation tool and the Compact did not provide the teacher with any authority over the landing of jobs which may have been used as leverage in both student academic performance and conduct (Rosenbaum et. al, 1990; Rosenbaum & Kariya, 1991). MacDowell (1989) also pointed to a lack of connection of the Compact to teachers' classrooms as a critique of the plan's effectiveness.

Additional criticism of the initiative would also be centered on the Boston Compact as a model. The replication of the partnership proved to be difficult by the National Alliance of Business. Educators in these selected cities realized that a cookie-cutter model would not effectively meet the needs of their particular cities and thus, they would need to customize program components beyond a basic school to work transition program that the original Boston Compact offered (National Alliance of Business, 1991; Waddock, 1992, 1993; 1995). Another challenge to the program in terms of replication was in the area of evaluation. Mossberger & Wolman (2003) identified a limitation to the use of the Boston Compact as a model due to the lack of rigorous evaluation of its beneficial effects. The rush to acclaim and replication was swift without a thorough understanding of its impact (Hartley, 1992).

Kantor (1991) presented further criticism of the model in his review of Portz's *City Schools and City Politics: Institutions and Leadership in Pittsburgh, Boston, and St. Louis*. The author pointed to the notion of elitism, where reform is initiated and implemented by the privileged of the city and limits the voice of those with less economic and social power. Specifically, he put forward that:

> …because it assumes that civic elites have no vested interests of their own but the public good, it valorizes them as well. Consequently, it tends to imply that elite involvement will necessarily lead to better schools, though there is little evidence that their agenda for school improvement has any place for reforms that address the sources of the problems currently plaguing urban education. (p. 244)

Finally by 1986, at a school level, principals and teachers voiced the sentiment that the Compact was not as impactful as anticipated. After an initial surge of support in the first two years of the pact, the energy and investment from the Compact seemed to have abated. Susan Ohmsberg, then assistant headmaster at English High School was quoted as saying, " in the first year and a half of the Compact, you could really tell what schools were doing. It was a priority in the system…Now (1986) it's just not as visible" (Farrar & Cipollone, 1986, p. 26). In the same study, Juliette Johnson, principal of Brighton High echoed that feeling. "The old school improvement team used to help with projects on improvement and evaluation. It's not that we can't ask for that (now), but you can't get the same kind of help…Two years ago, I knew the Compact's number by heart. But no Compact people have been here in two years. I don't know who they are" (Farrar & Cipollone, 1986, p. 25). However, the Compact was credited by staff in these same schools with providing the support, at least initially, to get school improvement projects started even if the programs were to be handled internally by school faculty. Since educators felt that there had been shortcomings in regards to real educational reform, there was some feeling that the Compact was essentially a large jobs program (Farrar & Cipollone, 1986).

The “decline” in involvement might have been by design suggested Jim Darr, Executive Director of PIC, as he “always felt that in terms of the impact of the Compact in the first two years, the business community’s side would be much more important than the school’s side, but that it would decline and should decline, relative to the school’s side of it” (Farrar, 1988, p.35).

In acknowledgement of the fact that jobs and minimum academic standards weren’t sufficient to lower the dropout rate, Laval Wilson, the new BPS superintendent convened a task force composed of leaders in the school department as well as business, universities and the neighborhood communities in 1986 to refocus on the issue of dropouts. The group established two goals: (1) to reduce by one-half the number of students who dropped out annually; and (2) double the number of dropouts who returned to school, either regular or alternative programs. In order to allow for schools to be successful for all students, the group agreed that the Compact’s efforts be extended to middle school aged students and that their efforts would include the support of neighborhood organizations (Employment and Training Administration, 1989; Hargroves, 1986, 1987).

The group determined that action should take place in four areas: school structural issues, basic education, alternative education, and human services. With programs such as Compact Ventures working with ninth grade students and families and Project Promise focusing on middle school students through a lengthened school day, this response to previously deficiencies was both more expansive and more targeted (Hargroves, 1986, 1987).

Boston Plan For Excellence

The Boston Compact can be credited with galvanizing additional support for educational reform as this era also ushered in other avenues for business to assist in addition to the Compact. With the encouragement of senior Harvard University education officials, the Bank of Boston marked its 200-year anniversary with a pledge of 1.5 million dollars to provide grants to individual school faculties for innovative practices and an endowment so that the program could live on in perpetuity. This program was announced on February 7, 1984 as the Boston Plan for Excellence (BPE) and was a response for the call to business for support of education. Its mission was to support innovation (Cronin, 1989; Dooley, 1994).

Spurred to action by the Bank of Boston's generosity, various businesses within the city raised funds to create and support their own programs. By 1987, these initiatives under the umbrella of the BPE included:

- Support for Early Education Development (established by Goodwin, Proctor & Hoar)
- Education Action Grants for Learning Excellence (Bank of Boston)
- The Hancock Endowment for Academics, Recreation and Teaching (John Hancock Financial Services)
- The Action Center for Educational Services and Scholarship (ACCESS)[1] (established by the New England Insurance Company and aided by the Massachusetts Higher

[1] In September 2012, ACCESS changed their name to uAspire

Education Assistance Corporation along with other corporate and philanthropic donors in the city) (A History of the Boston Compact: 1982-1999; Dooley, 1994)

By 1993, the Boston Plan of Excellence could point to 75 other private sources of financial support towards their goals of supporting innovation and improvement in public schools, increasing opportunities for students through scholarship and fortifying community support for the schools through a heightened appreciation of their importance (Cilley & Gibbons, 1993). While not a part of the Compact officially, the BPE had several parallels – namely widespread business support for Boston Public School educational reform.

The BPE would continue to be a strong player within the Boston educational world into the 2000s. Under the leadership of Ellen Guiney (1995-2011), the BPE continued to attract support from foundations, business executives and higher education leaders particularly during the era of superintendent Thomas Payzant (1995-2006). By the end of Payzant's tenure, BPS had been the recipient of $100 million from national and Massachusetts foundations to boost schools with BPE serving as the administrative agent in many cases. These investments from the Gates, Carnegie, Annenberg, Nellie Mae, National Science, and Boston Foundations, along with the Mayor's office, local university, and others supported a variety of initiatives including: breaking down larger high schools into smaller academies to increase personalization for students; after school programs; improved math and science instruction and performance; and a continuation of Payzant's "whole school change" model (Annenberg & Aspen, 2006; Cronin, 2011). BPE's connections with these organizations and the leaders that preside over them have clearly been fruitful.

One critique, as revealed by the report from the Aspen and Annenberg Institutes, *Strong Foundation, Evolving Challenges: A Case Study to Support Leadership Transition in the Boston Public Schools* (2006), written as Boston transitioned from Payzant's leadership was that this support from city elites raised questions about inclusiveness. In short, citizens and grass root organizations voiced concern about the disparity in access to decision-making between these political, business, and university leaders and themselves.

While the first decade of existence focused on providing grants to improve classroom instruction, the BPE has since been involved in a series of initiatives. Beginning in 1996, the organization concentrated its efforts on improved instruction through coaching both in the *Whole School Improvement* approach and later as part of the *The Collaborative Coaching and Learning Model*, which was adopted by the district in 2002. An additional program, "Principal for a Day", introduced by Guiney and Charles Gifford in 2002 brought CEOs and other leaders into the schools and increased awareness of the challenges faced on the ground level. Of note, 2003 brought the launch of the Boston Teacher Residency (BTR). The BTR has evolved into a nationally recognized teacher preparation program and is at the forefront of the work of the BPE at present. More recently, the BPE partnered with The Dudley Street Initiative to create The Dudley Street Neighborhood Charter School (DSNCS), described as the first step in a preK-12 pathway of excellent schools in the Dudley neighborhood of Boston. Finally, the relationship with DSNCS continues along with the Dearborn STEM Academy as sites for BPE's Teaching Academies, modeled after teaching hospitals where future educators learn their craft ("Teaching Academies", n.d.).

Boston Compact Two: 1989

In response to the lack of impact on the dropout rate and the minimal improvement on test scores in the early years, business leaders were frustrated with their partner, the school system. However, in spite of reservations concerning the school department's performance during the previous years, "We are not prepared to endorse the expenditure of another $100 million over the next four years if the rate of improvement will be no greater than it was the last four years," said Ferdinand Colloredo-Mansfeld, chairman of the board of the Boston Private Industry Council Inc. (Rothman, 1988), business leaders would ultimately renew their commitments to the students of Boston in 1989 with the signing of the second Boston Compact (Employment and Training Administration, 1989).

As part of the original compact, a clause was included that the agreement be amended and redrafted after five years. Therefore, in 1987, when Ferdinand Colloredo-Mansfeld, then Boston Compact Chairman, initiated the process of its renewal, a more complex emphasis on school reform was at the forefront (An Overview of the Boston Compact: 1982-2010; Farrar & Cipollone, 1988). The March 1989 Compact (II) declared five goals to achieve such reform. These goals called for:

- "Individual school site management, with some flexibility in operations in return for meeting performance objectives"
- More parent involvement, 50% or more of the parents to sign a parent pledge to enforce attendance and homework requirements

- Follow up services to the graduating classes for four years, with help from unions, ACCESS, the Higher Education Information Center, universities and the Boston schools
- Increased high school completion, including vocational and alternative diploma programs
- Increased performance on statewide and national tests, as well as a new broad based assessment program (Cronin, 1991, p. 15; National Alliance of Business; 1989)

The sentiment of business leaders at the time was that school change would result from school-based management. This approach was designed to disentangle the reform process from the existing bureaucracy. The school-based management would be implemented with the involvement and input from teachers and parents. These school site councils functioned as an advisory for principals and their powers include budget and program authorities (Portz, 2003). In support of this, the Boston School Committee, under some pressure from Compact leadership and AFT President Al Shanker, updated the pupil assignment plan to allow for more school choice and approved a new teacher union contract that would expand parent and teacher involvement in school management. These shifts coincided with the Boston Teachers Union becoming a full partner of the second compact (Cronin, 1991).

However, budget crises would limit some of the intended reform efforts put into place by the second Compact that originally included the provision of funds for training in school-based management and professional development for teachers. Also, during this time period, the business community had been advocating for an appointed school committee to replace the elected school committee even going as far as gaining approval from the state legislature in 1987. After four years of resistance, Mayor Flynn, with business and City Council support, succeeded in replacing the elected school committee posts with mayoral appointed positions when Governor Bill Weld signed the bill into law in July of 1991 (Gonsalves & Leonard, 2007). Lastly, the new school committee members and the mayor were developing a more acrimonious relationship with union leaders. Limited funds, coupled with frosty working relations, seemed to limit the overall effectiveness of the second compact (A History of the Boston Compact: 1982-1999).

Boston Compact Three: 1994

Signed on January 13, 1994, just one week after the inauguration of Mayor Thomas Menino, the third edition of the compact attempted to re-establish the harmonious collaboration that had dissipated over the previous two years (A History of the Boston Compact: 1982-1999). Compact III originally consisted of five goals with a sixth goal being added later that year. The goals for the compact were in the following areas: (1) access to employment and higher education; (2) commitment to innovation; (3) comprehensive curriculum, achievable standards and new assessment methods; (4) training and professional development; (5) support for parents and families; and (6) a plan to build new schools in various communities in the city. To achieve their goals, this compact also welcomed three new partners: family service providers, parent organizations, and arts and cultural organizations.

These goals were supported by a multitude of initiatives. In order to facilitate goal one, the ProTech program was created to provide internship opportunities for high school students, school to career programs were implemented, and the Compact for College Success was put forth. While the inaugural compact had pushed for an increased number of Boston students attending higher education, in response to statistics citing that 40% of BPS students were dropping out of college, the third edition focused on college retention. In regards to the pledge to commit to innovation (goal 2), the BPS school committee in partnership with the Boston Teachers Union committed to the opening of pilot schools, in which Boston Teachers Union contract rules could be circumvented.

To support the third goal, rigorous citywide learning standards would be established. An enhanced arts policy that recognized its role in improving student achievement was implemented. Also, student evaluation was revamped through standardized tests (the Stanford Nine was introduced) as well as rubrics, which were instituted to measure student work. In 1996, assistance would arrive when the businesses that endowed the Boston Plan of Excellence consented to consolidate their financial support to focus on whole school change. These BPE funds, as well as additional support fundraised by Bill Boyan, a Boston Plan of Excellence trustee, were used to match the Annenberg Foundation's $10 million offer in 1996 to support Boston Public Schools' objective of whole school change.

In order to finally make professional development a specified goal (goal 4), the Boston Public Schools and the Boston Teachers Union created a Center for Leadership Development, which would strengthen instruction while providing teacher independence and self-direction for their development. The fifth goal, support for families, emphasized early education. To that end, three new early learning centers were built; a Boston 2-to-6 program was introduced that provided programming opportunities as an extension of the school day; and ReadBoston, which asserted that all Boston students would be able to read by grade three, commenced as a city priority. Finally, a sixth goal was added to Compact III. A Blue Ribbon Commission was appointed by Mayor Menino that explored the possibility of building new schools in various parts of the city (A History of the Boston Compact: 1982-1999, n.d.; An Overview of the Boston Compact: 1982-2010, n.d.; Boston Private Industry Council, n.d.).

Three committees were designated to maintain these initiatives: a working group, a steering committee and a measurement committee to monitor progress towards the Compact's goals. All three groups would handle the ongoing activities with assistance from support staff from the superintendent's office and PIC. Additionally, a subgroup of the Boston School committee would focus on compact implementation (Portz, Stein & Jones, 1999).

Boston Compact Four: 2000

The fourth and final installment, signed on April 14, 2000 at Brighton High School, designated three goals ("Boston Compact 2000", n.d.) and Mayor Menino echoed the necessary shared responsibility of the group, "The only way we are going to meet the goals we share for our students…is if we all work together" (Boston Public Schools, 2000). Its signatories from that day showed the expanding diversity within the coalition from the initial Compact of 1982 as p in table 1 below.

Table 1
Boston Compact Four Partners (2000)

Signatory	Partner Organization
Thomas Menino-Mayor	City of Boston
Elizabeth Reilinger-Committee Chair	Boston School Committee
Thomas Payzant-Superintendent	Boston Public Schools
Edward Doherty-President	Boston Teachers Union
Charles Gifford-Chair	Boston Plan for Excellence Boston Chamber of Commerce
Marjorie Bakken-Chair	Boston Higher Education Partnership
Frieda Garcia-Chair	Boston Human Services Coalition
Cathy Kapler-Chair	Boston Cultural Partnership
Cathy Minehan-Chair	Compact Steering Committee Boston Private Industry Council

The goals were: (1) to meet the high standards challenge; (2) increase opportunities for college and career success; and (3) recruit and prepare the next generation of teachers and principals. In accordance with previous compacts, the 2000 version created accountability measures in all three areas.

As such, the measures for high standards included: graduation/dropout rates, MCAS scores, Stanford Nine scores, MCAS success after failure, attendance rate, and state funding for Boston Public Schools. The measures for college and career success consisted of: college and employment success rates, college retention, the number of BPS graduates meeting college admission requirements, and the number of students taking the PSAT and SAT. Finally, the measures for the preparation of teachers and principals were comprised by: the number of qualified applicants for teaching positions, colleges/universities signing the new teacher preparation agreement, "professional development school" agreements between schools and higher education institutions; early hiring commitments for applicants to specific Boston schools, and new teachers being retained after three years of experience (Boston Compact 2000, n.d.).

The reduction in the number of goals may have been an indication of Superintendent Thomas Payzant's concern for "projectitis". He commented about his desired nature of partnership for the city, particularly considering the climate of increased high stakes testing that began in the 1990s. "We can no longer afford the luxury of partnerships, projects, good will opportunities, or experiences that are not squarely aimed at instructional improvement" (as cited in Business-Higher Education Forum, 2001, p. 20.). By this time, both Payzant, as well as Boston Compact leaders, Ted Dooley and Cathy Minehan, understood that unfocused, fragmented partnerships could be inefficient and ineffective due to the strain they can place on individual schools' focus and energy (Business-Higher Education Forum, 2001).

Section Conclusion

It is at this point where the literature concerning the Boston Compacts ends. While the first signing of the Compact brought widespread initial praise and the subsequent thorough follow-up and evaluation, the later pacts were less documented. It appears that there was little to no evaluation into the performance of the 2nd, and 3rd and 4th in particular. Therein lies a gap in the literature. As explained previously, the purpose of reviewing the Boston Compact and The Boston Plan for Excellence is to know the local history of public-private partnerships in Boston in order to better understand the partnership landscape at present. This history is unbalanced and incomplete due to the dearth of literature focusing on the last decade. While this void is inconvenient, it does not prevent investigation into modern Boston partnerships. In fact, my research into the BOA is strengthened by a robust understanding of the contextual past as some of the individuals and groups involved in previous times are still very relevant in the current scene.

Section II: National Context

In this section, I place the prominent public-private partnerships of Boston in context of the national landscape by highlighting some important partnerships around the country. This discussion will illuminate the impact that the Boston Compact had on partnership in the United States as well as how other partnerships have come to influence partnerships in Boston more recently.

The Boston Compact was hailed as pioneering when it was announced in 1982. It was a large-scale public-private partnership made up of various city leaders dedicated to the improvement of Boston Public Schools. It signaled willingness for Boston leaders to recognize the need to work collectively to improve the schools. The various partners not only offered to actively engage in the school reform efforts, they created structures of accountability to ensure that the efforts went beyond talk. This original Compact would stretch into the new millennium with more than twenty years of partnership. During these decades, other large-scale private-public partnerships dedicated to school reform sprang up in other cities around the United States. While educational partnerships would more often still remain smaller in scale (for example, a business partnering with a solitary school), the type of partnership designed for district wide reform grew in selected cities.

Background

Ignited by the publication of *A Nation at Risk* in 1983, the state of public education came under the scrutiny of the general American public. As such, businesses, in addition to leaders of community organizations as well as parents, elevated their interest in and participation in the school system. As mentioned, this time period of the 1980s and early 1990s, during which the Boston Compact was formed, were fertile for the creation of school-business partnerships as illustrated by statistics reported by the National Alliance for Businesses (more than 140,000 one-to-one business to school or school systems were established during that time period) and the National Association of Partners in Education (51% of the 16,000 school districts in the United States were involved in some form of partnership program by 1991 and 29.7 million students were matriculating in schools with existing partnerships) as detailed by Waddock (1995). While it is clear that partnerships were prevalent, the nature and details of these partnerships are less clear.

Defining the Scope of Partnerships

The BOA is one public-private partnership amidst a long history of interest and involvement in public education by external organizations of all types in the United States. The influence has been brought to bear on a number of levels: nationally - policies drive various agendas; regionally - large individual corporations or foundations with ties to an area sponsor initiatives; and locally – small business owners or charitable individuals engage with a single school. The involvement manifests itself within a spectrum that stretches from national political advocacy and ballot initiatives to grass-roots volunteerism as a guest speaker in a classroom.

An assortment of research studies has been conducted at various levels of education that coincide with this gamut with a few listed here. While some researchers, such as Hyslop-Margison & Margison (1998), have examined the influence of a corporate agenda on higher education, others such as Baker (1994) and Scales, Foster, Mannes, Horst, Pinto & Rutherford (2005), have used a case study model to look at school-business partnerships at the high school level. Finally, both the individual efforts of Epstein (1996, 2001), Sanders (1996, 2001, 20003), and Sheldon (2003, 2005, 2007) and collective (Epstein & Sanders, 2006; Epstein & Sheldon, 2002; Sanders, Sheldon, & Epstein, 2005; Sheldon & Epstein, 2002) have focused their study of partnership effects primarily at elementary school levels.

Having determined to limit my review to public-private partnerships, further consideration was given to the size and complexity of the partnership. While there is a mass of articles on partnerships for solitary or individual schools, the findings of these types of smaller partnerships likely don't apply to the larger scale nature of the BOA. The BOA exemplifies a "large scale partnership" as defined as a partnership consisting of a variety of stakeholders from different industries. As such, my focus in the literature is on those partnerships that fit similar criteria – urban, a varied representation of leaders of a variety of industries tackling educational reform along an educational pipeline and is not meant to be exhaustive. Labels or descriptors of these types of partnership include "inter-organizational partnerships", "cross-sector partnership or collaboration," "public-private partnerships", among others. For the purposes of placing the BOA partnership in the context of other similar partnerships nationwide, these terms will be used here in the same manner as they are presented in the literature. In terms of meaning, I use these terms to express the same idea – educational partnerships involving multiple stakeholders from various industries to improve urban public education at a whole district level.

Finally, within these large-scale partnerships, there is additional differentiation. There are business initiated district partnerships such as the Long Beach Education Partnership; higher education-district partnerships such as the University of Chicago Consortium on Chicago School Research (UChicago CCSR), which focuses on the use of research to improve the Chicago Public Schools; and social service-district partnerships such as the Full-Service Community School Task Force in Oakland, California as examples of the varied partnership members. All of these partnerships are designed to reform education in the public school system of their respective district. Again, my intent was to examine and review partnerships most similar to the BOA with its wide array of stakeholders and emphasis on the cradle to career educational support.

Discussion of Other Large Scale Partnerships

Throughout the country, there are a number of partnerships similar to the partnerships of Boston. Here, I first briefly review large scale partnerships which grew directly from the model of and influence of the Boston Compact. The first was the Boston Compact replication project in the immediate aftermath of the original Compact. The second, the Los Angeles Compact (LA Compact), drew inspiration from the Boston Compact nearly 25 years later. This is followed by an examination of the Strive Together partnership of Cincinnati that consists of a similar model and scale of the Boston Opportunity Agenda and whose developmental period mirrors that of BOA. Finally, Strive's subsequent development of a national "Cradle to Career Network" to which the BOA is a member is discussed along with an explanation of the network's guiding principle, "collective impact".

Partnerships Influenced by the Boston Compact

Inspired by the Boston Compact, in 1986, the National Alliance of Business (NAB) began a project intended to replicate the Boston Compact in twelve cities[2]. The group, having studied the Boston Compact, made the following recommendations to the respective adoptive

---

[2] National Alliance of Business's Compact Project featured the following cities and projects: Albuquerque (New Mexico) Business Education Compact; Cincinnati (Ohio) Youth Collaborative; Detroit (Michigan) Compact; Invest Indianapolis (Indiana); Louisville (Kentucky) Education and Employment Partnership; Memphis (Tennessee) Youth Initiative; Greater Miami (Florida) Partnership; Pittsburgh (Pennsylvania) Promise; Providence (Rhode Island) Compact; Rochester (New York) Jobs, Inc.; San Diego (California) Compact; and Seattle (Washington) Youth Investment.

cities: “develop long-term measurable goals, designate a business intermediary, develop a planning structure, establish baseline data, secure financial resources, and organize collaboration” (Waddock, 1993, p.4 as cited from NAB, 1989).

As reported by the NAB (1991) itself, the replication had varying degrees of success in the cities. Generally, the author’s report concluded that:

> The Compact data support the position that collaboration must be considered as an evolutionary process involving: problem recognition, definition, and crystallization; context or macro-environment in which the collaboration takes place; development of an understanding of the nature of problems of education specifically, combined with emergence of a systemic orientation toward problem solving in education; coalition building processes; need for a "translator"; and need for a local solution.” (Waddock, 1993, p.7)

In essence, success was localized and dependent upon the individuals involved in the partnership, the process of partnership at the local level and other local environmental factors. A cookie cutter model could not be effectively utilized.

Los Angeles Compact

Developed in 2008 and officially signed in 2010, the Los Angeles Compact was not part of the previously discussed replication model. I have included it here as its creation also drew inspiration from the Boston Compact. Like its model, the Los Angeles Compact states goals for students consisting of the following: (1) all students graduate from high school; (2)

all students have access to and are prepared for success in college; and (3) all students have access to pathways to sustainable jobs and careers ("Our Approach", n.d.). The compact agreement has subsequently had updated agreements signed in 2014 and 2017 and continues its work presently. Representative of a broad stakeholder coalition, the LA Compact now has signees representing various organizations (currently 23, an increase from 19 originally) including the city mayor, the superintendent and board of education of the Los Angeles Unified School District, a coalition of area college and university leaders, LA Chamber of Commerce, the United Way, the United Teachers of Los Angeles, the AFL/CIO, among others. The official inclusion of the LA teachers union (UTLA) in the third compact agreement in 2017 (LA Compact Agreement 2017) is noteworthy and parallels the later versions of the Boston Compact.

Furthermore, a cradle to career framework supported by initiatives in the areas of early education (LA5); K-12 (Disconnected Youth: Los Angeles); and post secondary opportunity of employment has been created. Effectively, an educational pipeline, along with metrics for measurement and accountability, has been established. The LA Compact is led by a stewardship group, represented by the leaders of the signing institutions, which holds the responsibility to oversee the respective partnerships and to set the vision for working groups on initiatives. In addition, the LA Compact is guided by the principles of collective impact (Kania & Kramer, 2011) but is not part of Strive Together, a national network of collective impact inspired partnerships. Both collective impact and Strive Together network will be discussed later in this section. Finally, the compact in Los Angeles calls for commitments from all partners and accountability measurements to ensure progress.

While definitive answers to questions about the overall effectiveness of the Compact were posited local LA educational blogger and author, Charles Kerchner saw reason for optimism particularly in comparison to previous reform efforts in Los Angeles as this new compact provided realistic time frames for goals, created a division of labor in order to ensure aspects are completed, and a program design that fostered conditions for accountability for the respective signers. Interestingly, Kerchner (2010) noted that the business industry in this current attempt at educational reform through partnership is represented by the LA Commerce of Chamber as opposed to the CEOs of individual corporations that had previously existed in the 1990s in Los Angeles as the result of corporate departures from the LA area and the relocation to other areas of the country.

A parallel can be drawn to Boston in terms of corporate involvement in the public schools. Many of the corporations that had partnered with the Boston Public Schools such as Bank of Boston, the New England Telephone Company, and Gillette have been swept up in corporate mergers and acquisitions and the subsequent relocation of corporate headquarters has yielded diminishing interest in the Boston city from these business entities (Cronin, 2011). These Boston area business transactions may have been part of the seeming shift from corporate interest in Boston Public Schools dating back to the era of “The Vault” to the growing influence of philanthropic foundations at present.

StriveTogether

Another current example of large-scale partnership is *StriveTogether*, a non-profit subsidiary of Knowledge Works, located in Cincinnati, Ohio. Launched in 2006, this group has garnered support from area leaders to undertake the challenge of improving the area schools of Cincinnati and northern Kentucky. The group has engaged widespread support across sectors of the community and includes "300 leaders of local organizations [who] agreed to participate, including the heads of influential private and corporate foundations, city government officials, school district representatives, the presidents of eight universities and community colleges, and the executive directors of hundreds of education-related non-profit and advocacy groups" (Kania & Kramer, 2011, p. 36).

These leaders deliberately abandoned the previous practice of various area organizations individually battling against an array of educational ills that had been prevalent in the Cincinnati area. This phenomenon is termed by Kania and Kramer (2011) as *isolated impact* and described as, "an approach oriented toward finding and funding a solution embodied within a single organization, combined with the hope that the most effective organizations will grow or replicate to extend their impact more widely" (p. 38). On the contrary, one of the central tenets of *StriveTogether* is the idea of *collective impact*. In essence, this concept recognizes the advantages of, "the commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem" (p. 36). By joining their resources, talents, and efforts, the group can more effectively reach its goals.

Collective impact distinguishes itself from collaboration by adhering to certain principles in the organization. As *StriveTogether* exemplifies, collective impact involves, "a centralized infrastructure, a dedicated staff, and a structured process that leads to a common agenda, shared measurement, continuous communication, and mutually reinforcing activities among all participants" (p. 37).

Collective Impact

To provide a fuller understanding of the collective impact, I describe the five conditions that Kania and Kramer (2011) attributed to success with the model. First, a common agenda which, "requires all participants to have a shared vision for change, one that includes a common understanding of the problem and a joint approach to solving it through agreed upon actions" (p. 39) is discussed and any stakeholder differences regarding the the definition of the problem and the ultimate goal are settled. Common agenda does not mean free of conflict over specific components of the partnership, the authors noted, but signified agreement on the primary goal. The second condition is shared measurement, which relates to establishing a common agenda. Essentially, common goals lack significance and meaning without agreement in how they are measured. There are a host of benefits to common measurement offered including efficiency, the quality and effectiveness of the data, as well as the ability to learn by the partner members. Third, strong examples of collective impact have partners engaging in mutually reinforcing activities, wherein stakeholders work collectively together but "not requiring the partners to work on the same thing" (p. 40). This structure encourages members to focus their efforts on areas of strength in ways that support the efforts of the whole. As Kania and Kramer (2011) note, the power of the collective impact model results from the coordination of the partnership efforts and not the number of partners or the uniformity of their work. The fourth indicator of collective impact is continuous communication. Continuous and regularly scheduled meetings, attended by the CEOs of the partner members, strengthens partnerships. Time is afforded to develop: a common vocabulary, critical in establishing the shared measurement; understanding of the common motivation between their efforts; and trust that "each partners interests will be treated fairly and decisions will be made on the basis of objective evidence and the best possible solution to the problem" (p. 40). Lastly, a backbone organization, separate from the partner organizations, with dedicated staff to plan, organize and support the partnership is vital to collective impact success. The partnership members typically have no extra capacity to spare for these activities.

While the concept of collective impact can be applied to any specific social problem, as noted by the authors, the *Elizabeth River Project* working in Southeastern Virginia with an environmental goal and *Shape Up Somerville*, as a partnership to fight child obesity in Somerville, Massachusetts to name two, the *Strive Together Network* that has expanded nationwide from its Cincinnati's origins focuses on educational partnerships. Launched in 2011, this expansion now includes a network of more than 70 organizations in 29 states including the BOA in what it calls its *Cradle to Career Network*. Membership in the network affords members access to the national network's connections, support, data and innovation. In return, *Strive Together* requires that the organizations complete a civic infrastructure assessment, sign a commitment to quality, complete an annual progress assessment and most recently, members pay annual dues in return for resources, education, and support from other network partner members as well as the *Strive Together* network staff (“Where We Work”, n.d.).

While the authors conceded that, “evidence of the effectiveness of this approach is still limited, examples suggest that substantially greater progress could be made in alleviating many of our most serious and complex social problems if nonprofits, governments, businesses, and the public were brought together around a common agenda to create collective impact” (Kania & Kramer, 2011, p. 38). Additional support for the effectiveness of the model is the creation of the *Strive Together Network* (discussed above). The fact that approximately 70 organizations are now members perhaps can be used as a demonstration of its usefulness.

One emphasis of *Strive Together* that is trumpeted as fundamental to their organization is their “cradle to career” model. This model recognizes the need for the *Strive Together* group to focus its educational reform on all points of a child’s educational continuum at the same time. While an ambitious and wide spanning reform effort, *Strive Together* leaders determined that reforming only one aspect of a child’s education would fail to have a large impact no matter how effective the single program if other aspects and other times of a child’s education were absent of reform. It should be noted that this “cradle to career” focus was not present in the earliest versions of the Boston Compact. In fact, the initial Boston Compact focused solely on improving the education of BPS high school students. While subsequent Compacts expanded this focus to include elementary school, middle school students, and college students through school-based assessment as well as after school programs, it isn't clear if these efforts were well coordinated.

However, the present day BOA efforts were influenced by *Strive Together* and as such utilize collective impact concepts and the "cradle to career" model and as stated is a member of the Cradle to Career Network. This network consists of other cross-sector partnerships throughout the nation and whose work mirrors in some ways that of the BOA.

Trends in Philanthropic Giving

The BOA is a partnership with a great deal of support from philanthropy through its foundation partners. In this section, I review the national trends in philanthropy around the years of the BOA formation. A base knowledge of these trends is useful to interpret and understand the actions of the BOA.

Since 2008, Grantmakers for Education, a nationwide network of more than 260 organizations supporting education, has published an annual report – *Benchmarking: Trends in Education Philanthropy*. In the 2012 edition, three priority areas were early childhood education, college and career readiness, and education finance as indicated by survey responses from its membership. Additionally, each annual report has denoted that over 90% of funders collaborated in order to leverage their resources with growing emphasis on cross-sector collaboration, as additional stakeholders (not just other funders) are identified. With this shift, an increased level of responsibility has been acknowledged as foundations are reporting involvement in the following: funding for the planning process, convening stakeholders, facilitating the planning process, aligning funding with collaborative priorities, pooling funds for implementation, participating in the governance, and collecting and analyzing data (Figure 5 from Grantmakers in Education, 2012, p. 10). Clearly, education grant makers are moving away from simply providing funds.

Public-private partnerships, described as partnerships undertaken with various levels of government, are discussed separately in the report. However, in the case of the BOA, both of these descriptors (cross-sector and public-private) would apply so the lessons presented from this national report are appropriate. As indicated for cross-sector partnerships, philanthropists noted the high levels of time, work and energy for public-private partnerships to succeed. Furthermore, a challenge from leadership of public agencies was relayed. Specifically, grant makers stressed the importance of stable leadership in public agencies to success. A turnover of leadership results in diminishing effectiveness and impact and funders report looking for alternative methods to achieve impact. Moreover, the challenge of bringing together the different cultures between private foundations and public entities was communicated (Grantmakers in Education, 2012).

Finally, Grantmakers in Education conveyed the increased emphasis from its members on providing funding along the educational spectrum. This increase is the recognition of the limits of operating in "silos" with a more isolated and narrow impact. For example, a foundation may focus its effort on high school student acceptance to college. However, if there is a lack of support for college preparation, the students won't be in position to succeed once at the college or university. The philosophy of "cradle to career" appreciates the need for an understanding and alignment of goals, and the corresponding support, all along the educational spectrum of a child. The degree to which the BOA aligns or strays from these trends will be discussed in a later chapter.

Criticism of Private Sector Involvement in Education

It should be noted up front that oftentimes, business and philanthropy are listed as separate sectors in these large inter-organizational partnerships (for profit vs. non-profit). However, frequently these philanthropic foundations were created by corporate dollars - Gates, Walton, Wallace, Annenberg, to name a few - and are led by business executive types. Logic dictates that these organizations are likely to be influenced by their business perspectives and values. Thus, in the world of educational partnerships, the business and philanthropic distinction is often blurred.

This involvement from the private sector, often in the form of partnership, is a source of debate among scholars. Proponents of business involvement in education have offered suggestions for developing these school-business partnerships (Hyslop, 2009). Ardent supporters of these partnerships will point to the number of areas of expertise and roles that business can play - advocate, anchor, broker, coach, researcher – as support for business participation (Parravano, 2001). Mayor Michael Bloomberg's appointment of Cathleen P. Black, a leading executive in the media industry, to the role of chancellor of the New York City public school system (Samuels, 2010), illustrated a continuing trend to infuse business practices into education (Research for Action, 2004) and to look outside of the educational community for leadership and assistance.

However, this movement has not been without its critics (Edwards, 2008; Gardner, 2010; Molnar & Garcia, 2005; Sawchuck, 2009; White, 2007). Objection to business influence in public education is raised for a variety of reasons. Some opponents of business involvement in education question the motivation of business (Sawchuck, 2009) and maintain that this assistance is self-serving for corporate interests and that these unions exist solely for the preparation for future employees. Other cynics allege that corporate participation is simply one more avenue to promote their business and market their products (Molnar & Garcia, 2005). Finally, some detractors, including Edwards (2008) and White (2007), assert that conflicting ideals make business and their practices unsuitable for the educational arena.

While these critics may not be explicitly critical of the partnerships themselves, they are nevertheless wary of business involvement. Some of the unease may be warranted. The efforts of companies by their own admission, have long been at least partially self-serving, "The National Alliance of Business (NAB) recognizes the necessity and self-interest of companies getting involved in education due to the lack of ready candidates entering the workforce and acknowledges that the assistance is not solely altruistic" (NAB, 1989). However, generally, the concern of public school advocates is that the very existence of private sector involvement diminishes the *public* nature of education.

The discontent over the increasing privatization of schools often is centered in the debate over the increase of charter schools. While charter school and voucher supporters offer "competition", "choice", and the "free market" as mechanisms of improved education, dissenters see only privatization cloaked in business terminology with questionable results for public education. Scholars, such as Henry Giroux go further, charging that public education is “under assault” by a variety of groups. He contended that the most aggressive in this attack are neo-liberalists who, “…attempt to disinvest in public schools, replace them with charter schools, and remove state and federal governments completely from public education in order to allow education to be organized and administered by market-driven forces” (Giroux, 2012).

Kenneth J. Saltman echoed this alarm caused by the displacement of the public nature of schools. Additionally, he asserted that, on top of the harm caused by privatization, corporate reform in public education has not been effective. Essentially, he posited that the claim of improved education at lower costs has failed to be delivered. Furthermore, Saltman (2011) referred to research (Miron, Urschel, Mathis & Tornquist, 2010) that suggested that corporate involvement in public schools and the push for increasingly larger numbers of charter schools exacerbates racial segregation in schools and deepens the inequity of resources.

New Orleans

A deeper criticism of the privatization movement has been argued by Kristen Buras as the result of her studies of the New Orleans school district. Her position is that the intent of the privatization of schools through the creation of charters isn’t truly about improved quality of schools for the students of New Orleans but rather it is an intentional exploitation of a failing schools environment for the financial interest of the reformers (Buras, 2011). After the natural disaster of Hurricane Katrina, nearly 80% of New Orleans public schools were damaged. According to Buras, this incident and the subsequent rebuilding process provided the opportunity for the charter movement to exploit.

> Prior to August 2005, the locally elected [Orleans Parish School Board] OPSB controlled 128 public schools in the city of New Orleans. After August 2005, the state-run Recovery School District (RSD) assumed control of 107 of the city's public schools and chartered the majority of them, while only a handful of schools remained under local governance through OPSB. Thus, by 2009–2010, the majority of schools were charters – fifty-one of eighty-eight schools enrolling 61 percent of students. (Buras, 2011, p. 300)

More contentious than the sheer number of schools now as charters in New Orleans is Buras's assertion of the malicious intent of this charter school reform.

Chicago Renaissance 2010

The increased propensity for charter schools is not exclusive to New Orleans and their need to rebuild over 75% of the district schools. Other cities nationwide are experiencing the same boon. Chicago warrants discussion here as another example of the increased privatization of schools and charter schools. Announced in 2004 by Mayor Daley, Chicago Renaissance 2010 called for the closing of 60-70 public schools and the establishment of 100 choice or charter schools to replace them. Two-thirds of these schools would be run by private organizations and staffed by non-Chicago Public Schools union members. Of note to the authors was that the announcement was made at an event hosted by the Commercial Club of Chicago, which is an organization made up of the city's political, financial and corporate elite (Lipman & Haines, 2007). The Civic Committee for the Commercial Club had published a report titled *Left Behind* that called for the creation of at least 100 charters schools in order to increase parental choice and to put pressure on chronically failing Chicago neighborhood schools (Lipman & Haines, 2007, p.472 as cited from Civic Committee of the Commercial Club of Chicago, 2004). This project has been contentious and some of the effects of the project have come under critique (Lipman & Haines, 2007; Smith & Stovall, 2008). The plan, with links to real estate development, has both sets of authors pointing to the displacement of lower income African Americans as a troubling fact. Ren2010, guided by the Commercial Club, seems to disadvantage lower income and persons of color and promote commercial interests. While different in logistics, the nature of their allegations seems similar to those of Buras. Both reform movements in New Orleans and Chicago use the cloak of choice and market forces to promote an agenda of improved schools for students and families but both seem to have repercussions for lower income families of color in particular. Both situations call into question the true agenda of the private sector in educational reform.

While the focus of the research of the paper is not on charter schools or the privatization of schools, these concepts are indicative of some external groups' involvement in public education. As a matter of fact, partnerships, including the BOA, consist of involvement of external groups in public education. While there is no assumption that the

BOA is promoting privatization, considering the nature of this partnership, a brief discussion of this issue is merited.

Section III: Theoretical Framework

Hoy and Miskel (2008) theorized partnerships as a manner for organizations to deal with their external environment. As an attempt to control the external environment, organizations can implement two distinct strategies: establish linkages and shape environmental elements. Advantageous linkages, in the form of alliances, partnerships, or collaborations, bring together energy and resources to solve problems collectively. The combination of resources equates to increased power, improved performance and enhanced protection from adversarial environmental conditions. The partnership may also bring a sharing of costs and risks associated with the partnership's activities.

Cooptation is another strategy for developing favorable linkages. Cooptation implies bringing leaders from the external environment and involving them in the vision and decision-making structures of the organization. A benefit of co-optation is the increased level of influence, status and information that the leader brings to the table.

A second strategy for organizations is to try to shape the external environment by influencing policy. While policy is made by the membership within government, outsiders, such as interest groups, the media and collections of individuals (academics, researchers, consultants), can work to influence these decision makers on the inside of government. These groups attempting to influence educational policy include private foundations, teacher unions, businesses, policy institutes, among others. In fact, a circumstance of shared belief may encourage various groups to work jointly to either promote a policy or discourage an alternative.

Barringer and Harrison (2000) reviewed six theories along a spectrum to explain the impetus for inter-organizational partnership in the business world including transaction costs economics, resource dependency, strategic choice, stakeholder theory, organizational learning, and institutional theory. Additionally, Siegel (2010) presented similar ideas in his examination of university partnerships with an additional theory, domain focus, considered. These scholars' work was utilized to examine a high school and a community college partnership and explain its partnership formation (Leonard, 2013). Finally, Cantor (1990) also reviewed theories to explain inter-organizational partnership formation in the area of employment in his study, *Job Training and Economic Development Initiatives: A Study of Potential Useful Companions.* These combined lists will be used as a framework to investigate the motivation for partnership for the various organizations in the BOA. A summary of their review is below.

Transaction Cost Economics

This theory espouses the ideal that organizations should seek partners that will increase efficiency in its production and transaction costs. Essentially, firms would identify situations where a partner would lower their costs than if the organization were to produce or buy the item independently. In education, this might look like a school's physical education program. While the school could choose to build and equip the proper space for gym class, they might decide to collaborate with a local YMCA for the sake of efficiency. Critique of this theory centers on its narrow focus on efficiencies of cost to explain partnerships and ignores other possibilities for alliance (forthcoming). Furthermore, the theory discounts the "human" element and assumes that the people involved in the partnership will join together seamlessly.

Resource Dependency

Resource dependency theory is based on the concepts that all organizations exist within an environment and that there are external resources in that environment necessary to the organization itself (Barringer & Harrison, 2000; Van de Ven, 1976). In order to procure these critical resources (either through acquisition or defense strategies), partnerships are established and a dependency is formed. For example, schools cannot develop and produce their own technology. They rely on external partners. In some cases, these partnerships may be characterized by "mutual exchanges" that suggest equality. However, this is not always the case. Scholars have noted the possession and/or acquisition of these resources can create power and competitive advantage in the market. The limitation of this theory is that it does not consider alternate stimulus for alliance creation beyond resource deficiencies such as acquisition or purchase.

Strategic Choice

This theory encompasses a number of motivations for organizations to partner within the marketplace, all explanations falling within a broad umbrella of "strategic reasons". These reasons would include increased market power, political power, increased efficiencies, and product/service differentiation (Barringer & Harrison, 2000, p. 375). While resource dependency theory leans more on the deficiency or absence of a resource as the need to seek partnership, strategic choice suggests a more aggressive opportunism as the motivation for inter-organizational alliance. However, the expansive nature of this theory has made it difficult for precise conclusions to be drawn.

Stakeholder Theory

Stakeholder theory is a shift from the previous theories discussed that center around individual organizational interests to a more collective interest. According to this theory, inter-organizational alliances are formed to reach mutually held goals. Of note, stakeholder management perspective recognizes the fragility of these coalitions. First, while the general public may assume that all stakeholders are of equal power, this is often not the case with one organization wielding larger authority than others. In addition, while the organizations may have the ultimate goal in common, their individual cultures may be vastly different. Critique of stakeholder theory is that it is, "more descriptive than prescriptive" and that there is a lack of empirical testing (Barringer & Harrison, 2000, p. 377).

Organizational Learning

Learning theory posits the idea that organizations may seek alliances, which result in increased knowledge, thus resulting in an enhanced competitive position. This motivation for partnership demonstrates the axiom "knowledge is power" with the acquisition that the new knowledge brings. Other scholars, Powell, Koput, & Smith-Doerr (1996, p. 118 as quoted in Barringer & Harrison, 2000, p. 378), noted that, "Knowledge creation occurs in the context of a community, one that is fluid and evolving rather than rightly bound or static". In essence, it is the community created by the partnership where ideas flow, knowledge is created, and learning occurs in a manner that is not feasible in the context of a singular organization. Connected with learning theory is the concept of absorptive capacity – meaning the ability of an organization to learn. It suggests that some organizations are able to learn better than others. It should be noted that this ability can develop "cumulatively, be path dependent, and build on prior knowledge" (Barringer & Harrison, 2000, p. 379). Thus, an organization's capacity for learning is not static; it can be improved over time. In evaluating this theory, critics point to the lack of consideration of costs that the learning may incur. Unfortunately, a cost/benefit analysis is not possible as the results of the future learning are unknown.

Institutional Theory

Institutional theory contends that organizations may establish partnerships for reasons of legitimacy. In a business context, a smaller firm may ally with a more recognized and established firm to increase its visibility and prestige. For example, a smaller educational foundation may partner with the Bill and Melinda Gates Foundation and receive the benefit of the positive association with such a prominent organization.

Businesses also may participate in partnership with non-profit organizations. This connection can enhance the reputation of the firm within the community and recognition of its goodwill may be achieved. This voluntary participation to a non-profit organization and its cause may have commercial benefits as the result of its burgeoning reputation as an organization that cares. Finally, in all industries there often are ancillary benefits of being attached to a “winning” organization.

Cantor (1990) describes how organizations can also partner in times of conflict. Competing organizations may have conflicting goals but a partnership may allow them to mediate these conflicts in a manner that is socially acceptable within their environment. For instance, two restaurants may be part of a restaurant association and cooperate within this structure. Furthermore, there may be ramifications to choosing not to be part of this association in terms of reputation and recognition (Litwak & Hylton, 1962).

Domain Focus

Domain focuses on the need for partnership to solve large “meta problems” that cannot be handled by any one single organization. First, the issue needs to be recognized as an area that multiple partner organizations identify as a shared problem. This common challenge then can, “serve as the magnet that draws them in to solve or address the matter” (Siegel, 2010, p. 42).

Mandate

In select instances, organizations may be mandated to collaborate (Cantor, 1990) through legislation or governmental order. As a result of the mandate, the necessary structures are created. For example, in Boston during the 1970s, Judge Arthur Garrity ordered local businesses, universities and high schools to create partnerships as part of his desegregation orders. While authority can create collaboration, it is more difficult to impose cooperation. Weaknesses of this explanation are that it fails to consider the human element, whether the people involved support the partnership, or the legality.

These eight theories help to understand the formation of the BOA and to differentiate the various motivations for joining the partnership. These various explanations were utilized during the research process. Finally, consideration was given to the impact of different motivations on the BOA partnership itself and its operations and dynamics.

Summary

The historical events discussed in the first section describe earlier educational public-private partnerships in Boston and provided the background for the creation of the BOA. The second section reviewed some prominent partnerships that were either influenced by Boston educational partnerships or are presently connected to Boston educational partnerships. In discussing these examples of partnerships, I place the BOA in the context of these other collaborations so that there is a deeper understanding of how the BOA compares in relation, specifically the utilization of the collective impact model. At minimum, in the instance o*f Strive Together* in Cincinnati, there is a connection through the STRIVE Network to the city of Boston and the BOA.

The section reviewing some of the criticism of private involvement in public schools acknowledges the dissension towards this influence. As noted above, business involvement in schools *doesn't necessarily mean* the creation of charter schools and the increased privatization of schools. In fact, the Boston Compact, as a milestone of partnership with Boston Public Schools, was ushered in during an era before the charter school movement began. However, increasingly, the participation of the private sector in public schools has taken the shape of support for the creation of new charter schools or in some cases the management of existing schools by charter organizations. This foray has its critics. The final section reviewed research studying why groups partner or collaborate, meaning what is their motivation. This review provides the framework for my study of the BOA. While the public information about the partnership tells me about the mission, the funders and partners, and the progress, it does not provide information concerning why organizations are joining the partnership in the first place.

CHAPTER 3

METHODOLOGY

Introduction

The BOA announced on June 22, 2010 was the establishment of a powerful educational partnership in the city of Boston. Previously, the Boston Compact had evolved from an initial accord in 1982 by updating its goals and adding partners in the subsequent Compacts of 1989, 1994, and 2000. The original compact also inspired the Boston Plan for Excellence partnership in 1984. The last edition (2000) was the most comprehensive with a total of nine signers representing eleven organizations. While the particulars may have shifted during the decades of development, the focus on improving Boston Public Schools has remained primary throughout. While there doesn't appear to have any formal connection to the Compact, the BOA has taken up the mantle as the premier partnership working to improve education for the Boston community.

As reviewed in chapter two, there is a wide body of knowledge about Boston educational partnerships with the initial Compact in 1982 and less information with each subsequent edition. My research picks up the development of the BOA partnership in the years leading up to 2010 and adds to the previous research of educational partnerships in the city. In this study, I document the process of creating the BOA and the initial operations of the partnership. Additionally, I describe the experiences of the individual partners and their organizations as creators and participants of this public-private partnership. This new knowledge provides a better understanding of both how the BOA operates as a partnership as well as the experiences and perspectives of the participants. A comparison to previous partnerships in Boston, large-scale district partnerships in other cities, and the conditions of success outlined in the collective impact model, further contextualize these findings in chapter six.

Site Selection

I chose to focus on the development of the BOA from 2007-2019, which includes the planning period before the public launch in 2010 and the first nine years of existence. This research encompassed the creation period (2007-2010) and the initial years of operation (2010-2019). As mentioned, the BOA is a part of a longer continuum of public-private partnerships supporting Boston Public School education whose existence dates back to 1982. For the BOA, as a public-private partnership, I define the public domain as represented by the City of Boston (mayor's office), the Boston Public Schools, and Umass-Boston[3]. The private domain is represented by the foundations and philanthropic organizations.

As of late 2020, Boston Public Schools is a district serving approximately 52,000 students in 123 schools. Student demographics indicate that the overall student population is approximately: 42% Latino, 30% black, 15% White, 9% Asian and 4% Other/Biracial. Other statistics of BPS of note: 21.3% of students have disabilities (have an IEP); 48.5% of students' first language is not English; and 73% are considered economically disadvantaged

[3] The Boston Charter Public Schools joined the partnership after the interview phases of data collection.

(Boston Public Schools at a Glance Fact Sheet, 2020-21). Like many urban districts, BPS works to improve the educational experiences and outcomes for its students with partnerships as one lever to achieve this.

Due to its scale in terms of organizational size, the Opportunity Agenda has a wide variety of stakeholders. Clearly, there are numerous individuals and organizations such as politicians, community groups, students, families, teachers, administrators, and various employers among others that have an interest in the BOA and its performance. Thus, they would be considered stakeholders. However, my research was largely limited to the attempt to gather the various perspectives of the core partners or “central figures” (founders, board members, investors, partners) and the organizations that they represent as they are most appropriate to my study’s purpose, which is: to describe the formation and operations of the BOA; to explore the experiences and perspectives of these individuals and organizations with the partnership; and to determine what lessons can be learned from the Opportunity Agenda.

Figure 1

Levels of BOA Partners

My belief is that the findings from these core partners would best serve the intention of this research, which is to offer these BOA research discoveries as a guide to leadership of existing public-private partnerships as well as communities considering their development.

As discussed previously, the BOA has a group of core partners who provide governance through a board. There are three additional types of partners: investor, philanthropic, and community who support the work. As the core partners (and in many cases the founders) of the Opportunity Agenda, these partnership leaders have extensive knowledge of the partnership and therefore were a logical place to start. As they were involved from the onset, they were very familiar with the particulars of the partnership formation as well as the motivation for its creation, the decision making process, and its vision. They can be considered the partnership's inner circle. The investor, philanthropic and community partners are described as partners aligning their funding and programs with the BOA initiatives and goals. This suggests that they operate as part of the Opportunity Agenda but in a support role. The leaders of these partnering organizations are very knowledgeable about their individual experience and motivations, and familiar with general operations. They are less aware of decision-making processes, as their position is less central in the partnership.

Bear in mind, while the individual leaders and the partnering organizations have, in many cases, changed from earlier educational partnerships in the city, some principal actors involved have remained constant: the Mayor's office, the business community, the Boston Private Industry Council (PIC), the Boston Public School leadership, and higher education representatives. Additionally, many of the community partners (now numbering in excess of 100 organizations with the Opportunity Agenda) have also been involved in various education initiatives over the years. Clearly, both formal and informal relationships have been established prior to the creation of the BOA.

It should be noted that the Opportunity Agenda's extensive list of partners and investors consists *only* of the organizations identified on the website. There may be other individuals that were involved in the creation of the BOA whose voices may be relevant to my study. In order to tell the full story, every attempt was made to identify those individuals through my document research as well as suggestions given by the publicized participants during interviews.

Research Design

My research is broadly characterized as a qualitative study as the design fits the nature and characteristics of such a study as described by Rossman and Rallis (2003). It: "(a) is naturalistic, (b) draws on multiple methods that respect the humanity of participants in the study, (c), focuses on context, (d) is emergent and evolving, and (e) is fundamentally interpretative" (as cited in Marshall & Rossman, 2006, p. 2). Qualitative research is appropriate for looking at the BOA due to the complexity of the process of creating and maintaining this alliance. The Agenda's vast number of participants dictated that a nuanced approach utilizing multiple methods in this research be undertaken.

Within this broader qualitative characterization, the research is designed as a historical case study and thus the project employs methodology associated with case studies such as archival research, document analysis and interviews (Marshall & Rossman, 2006). This project is well suited as a case study that is both exploratory and explanatory. As Yin (2003) notes, case studies are, "preferred when: (a) 'how' or 'why" questions are being posed; (b) when the investigator has little control over events; and (c) when the focus is on a contemporary phenomenon within some real-life context" (p.1). This study of the BOA fits this defined criteria, as it: a) attempts to answer "how" and "why" questions (How did the Boston Opportunity Agenda develop from 2007-2019? Why did partners join the Boston Opportunity Agenda?); b) consists of an organization and an event over which I (the investigator) have no control; c) has a focus on a contemporary phenomenon (approximately late 2000s to present) that exists within the educational partnerships in the city of Boston.

The exploratory aspect of the study is due to the lack of previous academic research on the BOA and the limited general public information about the inner workings of the partnership. As a teacher in the Boston Public School system from 2001 to present, I can personally attest to the scarce updates of the Opportunity Agenda to the Boston Public school teacher and student populations.

As listed later in this chapter, my first research question is to find out how the partnership developed during the years of 2007-2019. I also explain the experiences, influence and perceptions of BOA partners during this same time period. These partners were familiar with the proceedings of the Opportunity Agenda (meeting dates, agenda, outcomes, etc) but their experiences and perspectives were unique. Individual partner responses illuminate differences in why these members got involved and remain involved; and their perceptions of the strengths and challenges of the organization. What Stake (1981, p. 47) describes as *heuristic* further illustrates the explanatory nature of the study. "Previously unknown relationships and variables can be expected to emerge from case studies leading to a rethinking of the phenomenon being studied. Insights into how things get to be the way they are can be expected to result…"(as cited in Merriam, 1998, p. 30).

Finally, as a historical case study, the project overlaps two types of projects: histories and case studies. The BOA is historical - its initial formation is complete and a decade of development has occurred - and thus can be researched as a history. However, it is also a contemporary phenomenon as the partnership is still in existence, the participants in the organization are still alive and largely involved in the partnership and thus can be interviewed unlike in typical histories. Additionally, the individual leaders and the partner organizations are local to the Boston area and thus geographical access to these subjects during research was possible. Furthermore, as typical in a historical case study, this study focuses on the development of a phenomenon over a period of time (Merriam, 1998).

The presence of the BOA member organizations and individual participants in the immediate Boston area allowed me to utilize techniques traditionally associated with a case study. One of the strengths of designing a case study for research is with the model's design and ability to deal with a wide variety of evidence ranging, among other types, documents, artifacts, and interviews (Yin, 2003). The BOA, with its multiple partners and its existence in Boston over an extended period of existence, clearly lent itself to the case study model.

However, scholars point to weaknesses of the case study as a research design. Principally, case studies are questioned in regards to their ability for study findings to be generalized. Particularly in the 'single case" case study, the conclusions drawn from the research of the BOA – a single entity – might be unique and therefore not applicable to other partnerships across the country, thus, putting into question the importance of the research. Furthermore, critics of case studies have noted that researchers in some instances have drawn conclusions from vague evidence and personal bias (Yin, 2003).

While total generalizations can be difficult to make in the conclusions due to the unique nature of this partnership (and every partnership), the knowledge gained from this case study is still valuable. This advancement in knowledge about the BOA achieves two goals. It updates the educational partnership scene in Boston and adds to the research about large public-private partnerships in urban education, which as noted previously in chapter two, has gaps. Furthermore, in order to mitigate the weaknesses inherent in case studies, I designed a case study protocol that utilized techniques such as triangulation to address issues of validity and reliability. This is discussed further in this chapter.

Finally, the discipline of history allows for a greater understanding and appreciation of the past by dispelling myths and illuminating truths. Furthermore, history allows us to see how past events have influenced the present (McDowell, 2002). By researching the BOA, my study clarifies the transition from the Boston Compact partnership in the early 2000s, its succession by the BOA and helps explain the present landscape of educational partnerships in Boston.

McDowell (2002) posited that there are two primary ways to approach the study of history: the cyclical view and the sequential view. The cyclical view takes the stance that organizations or even civilizations are like living organisms in that they experience a cycle of growth, maturity and decline. The theory states that different organizations or civilizations will alternately grow or decline and thus none remain static. Put simply, each is either growing or dying- there is no in between. This point of view rests on the concept that progress is temporary and that due to the decline and ultimate demise of organizations, each new organization must start fresh and advance and grow independently on its own merits. This view minimizes the organization's ability to learn from predecessors.

On the other hand, the sequential view implies that people and organizations can learn from earlier generations and as such, organizations build off the foundation established by the previous generation. It is a theory that views events as sequential and linear rather than cyclical (McDowell, 2002).

Applying McDowell's sequential view to the Boston Compact, it can be seen that four versions were agreed to by the stakeholders at various points of the partnership: Compact One (1982), Compact Two (1987), Compact Three (1994) and Compact Four (2000). Each compact grew from the foundation of the previous accord. Draftees of the various compacts acknowledged that the results of the prior compacts influenced their outlook and preparation for the subsequent compacts. This demonstrates the learning described in the sequential view. While the earlier history of Boston partnerships implied that a sequential approach was the most logical for this case study, I did not predetermine my approach, choosing rather to uncover the findings as they came.

My initial research provided a truncated chronology of events leading up to the public announcement of the BOA in 2010. Historical research has the reputation of being solely that – a recount of facts and previous events told in chronological order (Brundage, 2008). However, in actuality, historical research is more profound than this. Brundage presented the concept of history "as a dynamic process" and as a "rich, varied, evolving intellectual system that allows us to achieve a deeper and better understanding of our world, indeed of ourselves" (p. 2). In fact, history is expected to provide both the narrative (the details of actual events) and the analysis, which explains the broader context of the event and the event's place in it (McDowell, 2002). After clarifying the "what happened" aspect of the creation of the BOA, I utilized the sources to explain the experience of Opportunity Agenda participants and understand how events transpired in the manner that they did.

In spite of the time period's relatively proximity to the present day, the formation of the BOA and the subsequent proceedings is a historical event. Thus, my dissertation study qualifies as historical research.

In conducting this historical research, I addressed four research questions about the BOA from 2007-2019:

- How did the partners develop the Boston Opportunity Agenda partnership from 2007-2019?
- Why did the partners join the Boston Opportunity Agenda partnership?
- What are the partner's perceptions about the strengths and challenges of the partnership?
- What is the influence of the Boston Opportunity Agenda on Boston Public Schools?

Through investigation, the answers to the research questions bring forth greater understanding of the BOA. They provide increased clarity of the Agenda group's formation in terms of the involvement and operational processes of the partnership and its members, in a sense bringing to light "what happened"; and describe the experiences and perspectives of the Opportunity Agenda members in the partnership. In chapter six, I build upon the discoveries from the previous questions and put into context these particular experiences with those of previous partnerships in the city of Boston as well as other similar partnerships.

Data Collection

Qualitative research typically involves four methods of gathering data: analyzing documents and material culture, interviewing in depth, observing directly, and participating in the setting (Marshall & Rossman, 2006). Due to the nature of my study, I focused on the first two methods.

Document and Archival Records

The research design consisted of gathering evidence from a multitude of sources to obtain and review information on the BOA. By gathering a wide range of sources, I obtained a large spectrum of perspectives. These various perspectives afforded me a more in-depth understanding of the BOA. Initially, I garnered all BOA documents and public reports. This consisted of documents from the partnership itself; the individual partner members; and the initiatives of the partnership along the pipeline such as Thrive in Five, Summer Learning Time and Success Boston. These sources provided me with information and perspective from multiple members within the partnership.

Additionally, I collected information and perspective from sources external to the partnership. This research included accessing the Boston Globe, Boston Herald archives and Bay State Banner for articles and editorials of the BOA; additional periodicals such as the Boston Business Journal, Commonwealth Magazine, and organizations like the Boston Municipal Research Bureau and Massachusetts Business Alliance for Education also shed some light on the subject. Also, I examined Boston Public School Committee meeting minutes and records, Private Industry Council records and reports, documents from the mayor's office, the Boston Plan for Excellence, among others. While acknowledging that additional sources, such as other periodicals and civic or parent organizations, are not listed here, an exhaustive search was undertaken. During the research process, attention was given and notation taken to which sources are reporting on the Opportunity Agenda and which are not. The availability and the types of sources that the information derived from helped to enlighten the nature of the organization.

All of these document sources have strengths and weaknesses (Bowen, 2009; Cresswell, 1994; Yin, 2003)). Documents and archival records have the advantage of being able to be reviewed multiple times for greater clarity and understanding as well as accuracy. Additionally, these kinds of sources can provide very specific names, dates and details for a broad range of time and multiple events. Finally, documents and archival records are unobtrusive sources and therefore do not disturb the research setting.

On the other hand, document and archival research can have some limitations. A primary concern of these sources is accessibility. Various archives may be restricted and documents may prove difficult to retrieve. A less than full complement of document sources can compromise the quality of the research simply by the low volume of source material being gathered.

However, by casting the net wide to include the documents of all the partner organizations that are involved in the BOA, this potential research issue was alleviated. Moreover, a mitigating factor to the potential obstacle of accessibility was the public nature of many of the documents. For example, any report or publication posted on the partnership website or individual partner websites was available to the public. As a subscriber, the Boston Herald and Boston Globe and their archives were available to me. Finally, both the Boston School Committee meeting minutes and the mayor's office documents are public record and available to all. That being said, some documents such as the BOA meeting minutes and agendas and other internal communication were not available to me as a researcher.

A second weakness of document and archival sources is the bias that might be present from the author of the source. This can affect the accuracy of the report. As Yin (2003) warns, all documents and archival records have been written for an audience and purpose other than for my research. Thus, I consciously and carefully examined each source critically to reduce this threat. Additionally, I utilized multiple documentary sources to triangulate information and corroborate facts.

Interviews

The second data collection technique utilized in my research was interviewing selected participants in the BOA. As Seidman (2006) noted, interviews "provide access to the context of people's behavior and thereby provide a way for researchers to understand the meaning of that behavior" (p.10). My 16 interviews fleshed out additional information about the process involved in creating the partnership and the partner experiences. By interviewing the leaders from the partner groups (or an appropriate available person from that organization), I ascertained the various perspectives towards and about the BOA.

These interviews were semi-structured, which falls in the middle of the structured – semi-structured – unstructured continuum as described by Merriam (1998). A more open structure to interviews is typical of qualitative studies and allows for the researcher to have more flexibility with both the wording as well as the actual questions. While I asked some "set" questions, or more exactly had some set topics that to discuss (see Appendix B for interview questions), the nature of the semi-structured interview allowed me to respond to the interview subject's responses appropriately and engaged the participant in a more conversational manner.

All information was gathered in accordance with the Internal Review Board (IRB) guidelines. As such, all interview participants were given a letter of informed consent that outlined the nature of the research, as well as their involvement in the study. The interviews were recorded and then transcribed. The letters of consent, audiotapes and transcriptions were kept securely to protect the rights of the participants. This process is described in more detail further in the chapter.

To begin the process of data collection through interviews, I utilized my network for an initial introduction. Joan Becker, of Umass Boston, introduced me to Kristin McSwain, the Executive Director of the BOA partnership. Anticipating the difficulty of obtaining interviews with high level leaders, I contacted and met with Kristin McSwain. At our meeting, I provided a brief overview of the research project and discussed the partnership from her perspective to increase my general understanding. I described my interest in interviewing members of the Opportunity Agenda and requested that she introduce me to the individuals involved. Over the course of a 17 month period, Kristin introduced me via email to a number of my interviewees.

These interview subjects were a major source of my research. These figures were heavily involved in the formation and operation of the BOA. The insights and expertise that they provided from their first hand accounts added to the documental information I was reading. Many of the details they provided were not available in documents to which I had access. During these interviews, the participants did not provide additional document sources such as internal memos from their organizations, emails between other Opportunity Agenda participants, meeting minutes, etc.

Inherent to interviews are certain strengths. As Yin (2003) described, interviews allow the researcher to target specific people key to the case study. As stated, I attempted to interview the leaders for the core partners in the BOA and/or suitable representatives from the partnership organizations. The interview selection process permitted me to focus my interviews on the subjects most directly involved in the Opportunity Agenda and therefore, the most knowledgeable. These leaders act as my key informants. Key informants are critical to a case study – they go beyond being a respondent – they can offer insights into the case, corroborate or contradict other information, and provide suggestions for or access to other sources of information (Yin, 2003). Importantly, it is necessary for researchers to not be over reliant on any one key informant as their bias may influence the investigation. This was mitigated by triangulation of evidence, wherein I used both other interview subjects as well as documentary evidence to corroborate information.

For my interviews, I was able to interview the actual CEO in two instances: Nick Donohue (Nellie Mae Foundation) and Deborah Rambo (Catholic Charities). At the time period of my interviews (2015-2016), there were instances of representatives regularly attending the CEO level meetings for a variety of reasons including busy CEO schedules and leadership transition. In two other instances, I interviewed these representatives: Karley Ausiello (United Way) and Michael Middleton (Umass Boston). Finally, in several cases I was able to interview senior level people with lots of experience working on components of the BOA initiatives and who attended CEO meetings in some circumstances but were not formally part of the CEO group: Elizabeth Pauley (Boston Foundation), Rahn Dorsey (Barr Foundation during BOA development but was the City of Boston mayor's chief of education during time of interview), Kimberly Haskins (Barr Foundation), and Melissa Partridge (Boston Public Schools).

In summary, of the 12 original core partners, I successfully interviewed a leader or senior member from seven of the organizations (eight interviews total). Additionally, I interviewed the original board chair, Reverend Ray Hammond as well as Steve Greeley of DCA Consultants[4] who worked for several years during the early development of the Opportunity Agenda. The breakdown of the participants in context of the nature of their

[4] DCA Consultants changed their name to Shared Cause in 2018. www.sharedcause.org

organizations (public or private)[5] and the partner organization's primary focus[6] with the BOA initiatives is below.

Table 2
Participant Organization: Public and Private Partners

Public	Private
3	12

Table 3
Participant Organization Primary Pipeline Area of Focus (Initiatives)

A Solid Educational Foundation (Thrive in Five)	Kindergarten to Grade 12 (Summer Learning Project)	High School and College Completion (Success Boston)	Post Secondary Attainment (The Adult Opportunity Network
4	7	3	0

One technique I used was "snowball sampling", wherein these initial interview subjects suggested other candidates for interviews that strengthened the information gathered. This technique resulted in the completion of additional interviews to increase my level of understanding. Their suggestions provided other candidates to interview but research of these suggestions also led to additional documents to review as the result. Finally, the

[5] Steve Greeley served as consultant during planning and was not a formal partner; Reverend Ray Hammond was board chair and served the BOA as a whole.

[6] Many partners supported a variety of BOA initiatives and a designation of primary does not preclude additional areas of support.

varying points of view of the selected interviewees lent themselves to the implications section of this paper.

However, being able to interview these core partner leaders proved to be difficult as there was the issue of gaining access to the CEOs of the partner organizations of the BOA. A number of my intended interview subjects are what Marshall & Rossman (2006) term "elite individuals as they are considered influential, prominent, and/or well informed in an organization or community" (p. 105). Although accessibility was promising overall as the participants are largely in the Boston area, there was trouble with conducting interviews due to the busy nature of these elites' schedules and their status made it difficult to make an initial contact.

In fact, the scheduling of interviews was even more difficult than I anticipated. Lack of response or late response to interview requests delayed the process. Once contact was made, identifying suitable times for the interview meant scheduling weeks or even months out in advance. As a result, an extension from the UMass-Boston Internal Review Board (IRB) was required in order to complete the interview portion of data collection.

There were five core partners not being interviewed at all. Those organizations were: The Beal Companies, The Combined Jewish Philanthropies, Eos Foundation, The Kraft Family Foundation and New Profit Inc. This resulted from either my contacts to the organization's leadership via email and telephone were not returned or at the counsel of Kristin McSwain, who was familiar with the CEO's availability more intimately than I. Finally, there were some organizations that joined the Boston Opportunity Agenda partnership group after my data collection period (Angell Foundation, the Boston Archdiocese of Catholic Schools, Boston Charter Alliance, Boston Children's Hospital, Smith Family Foundation) thus I was unable to interview them.

Other challenges to interviews can arise during the process as well. Poorly constructed interview questions due to inexperience can lead to either bias or reflexivity, which is described as the interviewee giving the answer that the interviewer wants and is similar to a leading question. A measured review of my proposed questions by my dissertation committee improved the quality of questions and limited these effects.

Lastly, interviewees had difficulty recalling certain information due to the span of time being studied (in some instances thinking back more than five years) and the number of individual events that occurred during that time frame of launching a complex partnership. An absence of recall (a void of information) can leave questions unanswered while poor recall (inaccurate information) may create inconsistencies or foster unsubstantiated conclusions by the researcher (Yin, 2003). Again, never depending on one source for information and thus corroborating details with documentary evidence or other interview subjects counteracted this weakness.

Figure 2

Research Phases

Data Collection Procedure

As demonstrated in figure 2, the data was generally collected in two phases. The first phase focused on the retrieval of documents and archive records as well as reviewing published reports and public websites.. These documents provided some of the basic information concerning the BOA and were analyzed to glean further insight into the process and organization. This research also prepared me for the interviews to be conducted in the second phase. The bulk of this research was conducted during the 2014-2019.

The second phase began with interviews of the founding core partners of the BOA (a full list is in the appendix). Again, these interviews further illuminated not only the development of the partnership but also the experiences of the participants in the partnership. As stated earlier, I utilized a snowballing technique to elicit additional individuals for an interview as appropriate. These interviews were conducted in 2015 and 2016.

However, the process was more organic than a strict phase one (document analysis) and phase two (interview) progression. For example, as key members of the BOA, my interview subjects provided information in their responses that led me to research additional documents and reports through my notes during the interview or later during review of the transcription. Thus, I returned to the document analysis described in phase one. This process continued during the duration of the data collection. Upon completion of the data collection, the data was then analyzed.

Data Analysis Strategies

Qualitative data analysis is generally understood as, "the process of bringing order, structure, and interpretation to a mass of collected data" (Marshall & Rossman, 2006, p. 154). For this study, the data analyzed was primarily collected from documents and interviews. The analysis process that I engaged in was consistent between the mediums although each source necessitated a slight variance in technique appropriate to the resource. According to Marshall & Rossman (2006), analysis typically involves seven phases: (1) organize the data; (2) immerse oneself in the data; (3) create categories and themes; (4) code the data; (5) offer interpretations; (6) search for alternative understandings; and (7) write an interpretation of the data.

In my study, documents first needed to be analyzed. In an article on document analysis as a research method, Bowen (2009) defined document analysis as, "a systematic procedure for reviewing or evaluating documents-both printed and electronic (computer-based and Internet-transmitted) material" (p. 27). It involves the three steps of "skimming (superficial examination) to identify significant sections; reading (thorough examination); and interpretation" (p. 32). For the interview phase, the interviews were first conducted and then transcribed. While I performed an initial analysis of the content of the interview as they were completed by taking personal notes, I engaged in these three steps of document analysis to fully understand the information in both the transcribed interviews as well as the document research.

Additionally, Bowen (2009) posited that document analysis is a combination of content analysis and thematic analysis. He explained the terms as follows: content analysis is the "process of organizing information into categories related to the central research questions", while "thematic analysis is a form of pattern recognition with the data, with emerging themes becoming the categories of analysis" (Bowen, 2009, p. 32 as cited from Fereday & Muir-Cochrane, 2006). Essentially, I utilized the first step, skimming, to identify salient sections of information as my content analysis. The second and third steps, reading closely and interpretation, were my thematic analysis as I created codes and categories to organize those pertinent sections and identify relevant themes within the information collected.

The organization of the data involved multiple processes. Specifically, the first step to organizing the data was to create a series of codes that identified data into categories and relevant themes. These codes were aligned with and helped to answer my research questions about the BOA from 2007-2019.

- How did the partners develop the Boston Opportunity Agenda partnership from 2007-2019?
- Why did the partners join the Boston Opportunity Agenda partnership?
- What are the partner's perceptions about the strengths and challenges of the partnership?
- What is the influence of the Boston Opportunity Agenda on Boston Public Schools?

I initially used the following set of codes to categorize the information I encountered: how partnership was created, how organization joined, details of partnership (how partnership developed?); motivation, theory of change (why did partners join the partnership?); challenges, successes, future, cross initiative, decision making, details of partnership, evaluation, funding, organization involvement, learning, meetings (what are perceptions of strengths and challenges?); and influence on BPS, BPS influence on partnership (what is the influence?). These codes were applied to both interview transcripts as well as the content of documents and allowed me to integrate the data from a multitude of sources.

Secondly, I analyzed all the data collected under the codes of "how partnership was created" and "how organization joined" and created a timeline of events specifically leading up to the launch of the BOA. The chronology of events described what occurred in the formation of the BOA. This helped me to understand what happened and when; which events led to which other events; and who participated in which events. Additionally, the establishment of a chronological timeline permitted me to better understand the scope of time for both the creation of the partnership as a whole, as well as for the individual initiatives. The organization of information through chronology helped me to understand the first research question: How did the partners develop the Boston Opportunity Agenda from 2007-2019? With an established chronology and corresponding findings for the planning years (2007-2010), I relied on the annual report cards (2011-2013, 2015-2019) and other documents to understand how the partnership changed as it developed.

For the additional questions, I again analyzed the data under the respective codes above looking for themes. As themes emerged, I created tables to organize the data and color coded the evidence based on the type of organization the partner was. These color codes were foundations/charities, the schools, and intermediaries and community partners. This system organized the data so that I understood the data as a whole for each research question but could also examine and compare the partner responses for each research question. After the data was coded and organized, I wrote my interpretations and shared them with a committee member for feedback.

Quality of the Research

In conducting this study of the BOA, I was interested in providing a description of the BOA as an organization by examining its creation and the experience of the partners. In doing so, I needed to be mindful of designing a project that Marshall & Rossman (2006) that "responds to criteria for the overall soundness; demonstrates the usefulness for the particular conceptual framework and research questions; and demonstrates the sensitivities and sensibilities to *be* the research instrument" (p. 200). Below, I describe the manner in which I adhered to this criteria described by the authors in regards to qualitative research.

Validity And Reliability

Yin (2003), among others (Merriam, 1998), offers strategies for dealing with both validity and reliability of the research. Validity is generally defined as the degree to which the study is designed to measure what it says it is going to measure – meaning it is suitable for the study. Validity in case study research can be broken down into two types. First, internal validity is described, "as the accuracy of the information and whether it matches reality" (Cresswell, 1994, p. 158). This validity can be maintained in a case study using various strategies including using multiple sources of information, establishing a chain of evidence, peer examination and having key informants review drafts of the case study. Secondly, external validity deals with the issue of the ability to generalize the findings from the case study. External validity typically can be sustained through careful research design and by using theory.

In order to address the issue of validity in my research, I engaged in several strategies. Primarily, I utilized triangulation to confirm my findings. For example, I used multiple document sources to corroborate facts discovered during the research process. Secondly, one focus of my interviews with participants in the BOA was to verify information that I have discovered either in sources as well as information gathered from other interview subjects. Additionally, I "member checked" by offering interview quotations to the interview subjects for review. This further enhanced the validity. Finally, I enlisted the assistance of my committee members to comment on my findings as they were developed (Merriam, 1998).

An additional consideration of this research for which I needed to account was bias. Many documents from this research were either created by the partnership or partnership member itself or were commissioned by the partnership or member. Bias can affect the soundness of the findings. It is important that a researcher considers each account, and thus I examined each critically, sorting out any obvious errors or omissions so that I constructed the most accurate portrayal of the event as possible (Brundage, 2008).

Interviews presented validity issues as well. As stated previously in the interview section, people subject to interviews and responding to events that occurred in the past may have trouble recalling the specifics with 100% accuracy. Time simply has eroded some of the minutiae. In addition, bias may have been present from the interview subjects as they are participants in the BOA. As such, these individuals invested a great deal of time, energy and money into the partnership. This personal connection to the partnership may have caused them to view the partnership with rose-colored glasses. In some instances, subjects may have heightened the importance of their contributions or magnified the effects of their input while minimizing the shortcomings of the partnership as a whole or their participation. Finally, BOA partners may have developed unspoken personal conflicts. This discord could have influenced the responses of interviewees and needs to be recognized. In order to mitigate this challenge, I again triangulated the information gained from interviews with other interviews as well as document research. Finally, I was mindful to review interview responses and interpretations with a critical ear so that I was able to maintain a level of validity.

External validity has been a challenge to qualitative researchers. Merriam (1998) illustrated the conundrum of external validity encountered by investigators involved in qualitative cases studies when she described the purpose of a single case is to understand "the particular in depth, not to find out what is generally true of the many" (p. 208). While the generalizability of qualitative research has been problematic, Marshall & Rossman (2006) offer steps that can be undertaken by the researcher to address those concerns. These steps include: declaring that the nature of qualitative research prevents duplication since the world is always changing and thus the conditions of the research are always changing; maintaining thorough notes and explicit explanation of design and rationale so that other researchers can scrutinize if desired; and preserving records of all collected data so that is organized and easily retrievable. By following these guidelines, I ensured that this concern is addressed.

Finally, reliability needed to be considered. Reliability is the test for accuracy – meaning if another researcher conducted the same case study later, that researcher should come to the same conclusions. While this also has been an issue with case study research, spelling out the researcher's central assumptions, the selection of informants, and the biases and values of the researcher helped to mitigate this weakness (Creswell, 1994). Lastly, I established a case study protocol prior to beginning the case study research and documented procedures which can ensure reliability as noted by Yin (2003).

Ethical and Political Considerations

Research of this nature has some political considerations. Boston is a small city. Leaders within the various industries – business, education, and political offices – often know and work with each other. During my data collection, particularly interviews, sensitivity towards speaking their mind may have existed with my interview subjects. Participants may have hesitated to fully express their opinion concerning the BOA simply for the fact that there could be ramifications for those comments within the Boston education and social worlds. As I discuss below, interview participants were afforded the opportunity to speak "off the record" as the interview process necessitated. Ethically, I considered the ramifications of participation in my research for my subjects. While I needed their assistance to clarify my document research and provide their insights, as a researcher I had a responsibility to do no harm to my subjects.

Finally, there are political considerations for myself. Although I developed this thesis as a doctoral candidate at the University of Massachusetts-Boston, my full-time employment is as a high school teacher in the Boston Public Schools. Thus, I was mindful of the same considerations that I give my subjects in regards to the parochial nature of Boston and the educational ecosystem in the city.

Reflexivity Statement

There is also the issue of bias as the result of my professional career as well as my identity and positional status in society. First, I have worked at Boston Public Schools from 2001 to present, the same district with which the BOA partners. While I have not been directly involved with the BOA, I have worked with the Private Industry Council (PIC) in preparing students for jobs and assisting PIC with its recruitment for job shadowship and internship activities as well as uAspire (formerly ACCESS), the financial aid counseling organization for BPS students. Both of these organizations are listed as Community Partners on the BOA website. Moreover, my responsibilities as a teacher of business courses in Boston Public high schools have included cultivating partnerships with various partners including businesses such as TJX Companies, Verizon, Bob's Discount Furniture, College Hype Silk Screening, and colleges and universities such as Northeastern University, UMass-Boston, Bunker Hill Community College, Roxbury Community College (the last three are BOA partners), among others. While these partnerships were on a smaller scale than the BOA, these relationships have influenced my views on partnerships favorably. Finally, my identity as a white male and a college graduate shape my perception of public-private partnerships, the research design and the interpretation of the findings. For instance, many of the original partnership leaders were of a similar background as mine. This commonality resulted in a predisposition to valor leadership efforts as worthy and valorize them. My identity limited my point of view regarding partnerships, not fully recognizing the social justice issue immersed in all aspects of urban education and not considering the ways that this partnership was designed for the historically marginalized student populations they serve. Subsequently, the research design was constructed to understand public-private partnership formation as a means to offer future communities considering these partnerships a roadmap, rather than research that critically examines the purposes and impact of these public-private partnerships on their communities in the first place. In recognition of my background and professional experience, I conducted my research carefully and critically so as to reduce bias to the level that it is possible.

Summary

Research into the BOA provided a detailed account of the formation of a public-private educational partnership. The nature of this kind of partnership as a demonstration of "collective impact" is touted as being advantageous to solving larger societal issues (Kania & Kramer, 2011). Improved educational outcomes for the children of Boston has been a focus of educational partnerships for the last four decades and an account of the BOA updates the body of knowledge concerning this important work.

CHAPTER 4

FINDING ONE: THE BOA DEVELOPMENT (2007-2019)

Introduction

The purpose of this historic case study of a large-scale public-private partnership in education was to understand how the BOA was formed, why partners joined the partnership, and to learn about the partner experiences in the partnership. These findings further our understanding of this specific partnership, its place in partnerships of Boston historically and add to our knowledge of public-private partnerships more generally. This research was guided by the research questions about the BOA from 2007-2019:

- How did the partners develop the Boston Opportunity Agenda from 2007-2019?
- Why did the partners join the Boston Opportunity Agenda partnership?
- What are the partners' perceptions about the strengths and challenges of the partnership?
- What influence is the influence of the Boston Opportunity Agenda on the Boston Public Schools?

It should be noted that while this case study of the BOA is intended to be a close examination of the partnership creation and operation of a large scale public-private partnership in education, it does not claim to represent every conversation, activity, and subtlety in the history of the BOA.

In this chapter, I first review the data analysis process of the research including a description of the analysis steps, how the data was organized and the code utilized. This is followed by the presentation of the findings of the research question: How did the partners develop the Boston Opportunity Agenda from 2007-2019? The remaining three research questions (Why did the partners join?; What are partner perceptions of strength and challenges?; and What is the influence of the BOA on the Boston Public Schools?) will be presented in chapter five. After each research question, I summarize the findings of that particular question. The fifth chapter concludes with a summary of the key findings overall and a preview to the discussion in chapter six.

Data Analysis Process

In order to answer the research questions, I needed to analyze the data. I provide a review of this three step process defined by Bowen (2009) here. For each document or interview transcription, I first skimmed the text to identify important information to my research questions. From there, I read the document more closely and identified categories for relevant information that contributed to the findings. Last, I created codes that aligned with both my categorization of data and the research questions I asked. These codes and the applicable research question were as follows: how partnership was created, how organization joined, details of partnership (how partnership was developed?); motivation, theory of change (why did partners join the partnership?); challenges, successes, future, cross-initiative, decision making, details of partnership, evaluation, funding, organization involvement, learning, meetings (what are perceptions of strength and failure?); and influence on BPS, BPS influence on partnership (what is the influence?). I created tables to organize the data and color coded the information based on the type of organization. These color codes were: foundations/charities, the schools, and intermediaries and community partners. A further close analysis of the coded information was performed and themes began to emerge. The data was then carefully examined and corroborated with other sources to ensure validity. This was particularly important with data gathered from the interviews since it relied on the interview subject's recall. Lastly, I wrote my initial findings and shared them with a committee member for feedback.

Finding One: The Partnership Development from 2007-2019

Introduction to Finding One

In this initial section, I give an overview of how the BOA partnership was created, the participants involved, and the determination of the partnership's focus leading up to the partnership's launch (2007-2010). The intention of this overview is to provide the reader a sense of the sequence of events that brought the partnership to fruition as well as the scope of the partnership's work. This overview of the ideation and creation phases (2007-2010) will be followed by a summary of key events and initial analysis.

The subsequent section details some of the significant partnership changes that occurred after the initial launch in 2010 until 2019. These findings describe how the partnership shifted in response to emerging opportunities, self-evaluation, and other changing conditions.

The Formation of the Boston Opportunity Agenda (2007-2010)

Sometimes, an idea starts with a question. “There are some really terrific foundations in this town; can't we find some way to work together?’ It was about that basic a question,” remembers Steve Greeley of DCA Consultants[7] who facilitated the development of the BOA in the early years (S. Greeley, personal communication, June 2015). This simple question posed in 2007 by Bob Beal, a local real estate developer and Myra Kraft, trustee of the Kraft Foundation "inspired the four large public charities in Boston – The Boston Foundation, Catholic Charities, Combined Jewish Philanthropies, and the United Way of Massachusetts Bay and Merrimack Valley to ask themselves and then each other, that same question: “can we find a way to work with each other?” recalled Elizabeth Pauley of the Boston Foundation (E. Pauley, personal communication, March 2015). As a result, this small cadre of funders began the conversation about what exactly a combination of their efforts might look like. These early conversations spawned the creation of a comprehensive public-private partnership titled the Boston Opportunity Agenda, which ultimately launched publicly in June 2010. Its mission: to support the education of Boston residents from birth to adulthood. (A brief introduction of the philanthropic organizations involved at the official launch in 2010 is listed in table 4).

[7] DCA Consultants subsequently changed their name to Shared Cause in 2018. https://sharedcause.org/

Table 4
BOA Philanthropic Organizations: 2010

Name of Organization	Brief Mission or Description	Net Assets (EOY 2017)
The Boston Foundation (2010-Present)	As Greater Boston's community foundation, the Boston Foundation devotes its resources to building and sustaining a vital, prosperous city and region, where justice and opportunity are extended to everyone.	$1,083,452,538
Catholic Charities (2010-Present)	Catholic Charities' mission is to serve the poor and to continue to build a just and compassionate society rooted in the dignity of all people.	$29,974,208
Combined Jewish Philanthropies (2010-Present)	The mission of CJP, Greater Boston's Jewish Federation, is to inspire and mobilize the diverse Greater Boston Jewish community to engage in building communities of learning and action that strengthen Jewish life and the world around us.	$1,348,806,068
The United Way of Massachusetts Bay and Merrimack Valley (2010-Present)	We unite to create positive, lasting change for people in need. We call it harnessing the power of people working together. And that means everyone — individuals, nonprofits, companies, and government agencies. We work every day to achieve our vision and mission by focusing on two foundations of better lives: Financial Opportunity and Educational Success. (website)	$53,149,637
Kraft Family Foundation (2010-Present)	The foundation supports organizations involved with arts and culture, higher education, health, youth development, and Judaism.	$44,215,644

New Profit, Inc (2010-Present)	New Profit is a national nonprofit venture philanthropy organization that aims to break down the systemic barriers that stand between people and opportunity in America. Our core belief is that visionary entrepreneurs and philanthropists can upend the status quo and transform education, early childhood development, economic empowerment, and public health.	$44,696,700
Barr Foundation (2010-Present)	Based in Boston, Barr focuses regionally, and selectively engages nationally, working in partnership with nonprofits, foundations, the public sector, and civic and business leaders to elevate the arts and creative expression, to advance solutions for climate change, and to connect all students to success in high school and beyond.	$1,229,736,334
Nellie Mae Foundation (2010-Present)	To champion efforts that prioritize community goals that challenge racial inequities and advance excellent, student-centered public education for all New England youth. (website)	$518,068,814
The EOS Foundation (2010-2012)	The mission of the Eos Foundation is to break the cycle of poverty by investing in children's futures.	$38, 568,549

Note. Table adapted from information provided from organization 2017 tax forms. Source: www.Guidestar.org 990 TaxForms (2017)

In 2007, Bob Beal and Myra Kraft were joined by Paul Grogan (President of The Boston Foundation), Reverend Ray Hammond (Chairman of the Board of the Boston

Foundation), Michael Durkin (United Way), Barry Shrague (Combined Jewish Philanthropies), and Tiziana Dearing (Catholic Charities) to explore the possibilities. As leaders of large philanthropic organizations, these individuals were frequently being approached for funding by the same non-profits and providers in and around the community of Boston. Essentially, a system of overlap for both the application for and granting of funding to local providers was occurring. Initially, interest in achieving potential efficiencies in funding was enough to bring these organizations to the table. Reverend Hammond described the funders thinking, "they could more effectively leverage their giving and philanthropy and grant-making by coordinating their efforts. They obviously all had their own strategic plans and directors and so on, but were often contributing to the same organizations, trying to affect some of the same changes. Wouldn't it make sense to sit down, and have some regular forum to talk about that and try to coordinate those efforts?" (R. Hammond, personal communication, April, 2015)

The group worked deliberately but committedly over the next year and a half (2007-first half of 2008) meeting regularly to identify the needs of the city of Boston and strategizing ways to increase the effectiveness of their individual giving through this partnership. Over months of these meetings hosted at the Boston Foundation, the group realized the potential catalytic power of these large foundations pouring their resources into a common cause. The consensus in that belief led to the question of whether there was a common agenda which the funders could support.

Each of these organizations has a variety of interests. For example, the Boston Foundation, as the city's community foundation, aims to impact areas of arts and culture, housing, civic leadership, jobs and economic development, and education among others ("Impact Area Grantmaking", n.d.). The United Way focuses its support on two fundamentals of people's success: education and financial opportunity ("Our Impact", n.d. The United Way) and Combined Jewish Philanthropies' mission is to galvanize the greater Boston Jewish community to tackle issues of poverty, homelessness, and learning (particularly adult learning) to list a few ("Our Impact", n.d. Combined Jewish Philanthropies). Thus, these institutions represented broad areas of interest and were not exclusively focused on education.

Over time, an agreement was reached within the organizations that education was an appropriate focus as it resonated with each organization's individual mission. As Elizabeth Pauley of the Boston Foundation described, "Together, the leaders of those four organizations, sort of coalesced around an idea, that, 'What if we had a large and comprehensive agenda with only a handful of metrics, but large in ambition?' Data-driven, cross-sector, that could really change the life trajectory for kids across the education pipeline" (E. Pauley, personal communication, March 2015).

With the focus determined, the group took the next steps to advance the work. They looked at effective programs both in the Boston area as well as other parts of the country. Some promising partnerships in Boston included Thrive and Five (launched in 2008) and Success Boston (started in 2008) and were quite familiar to funders as they were initiatives that members of the Opportunity Group funded individually. While their early research uncovered promising practices in specific areas such as third-grade reading level proficiency or post-secondary completion, absent in the Boston vicinity were efforts to provide support for all areas of the educational pipeline or continuum, a concept in which the group was increasingly interested.

Looking outward to the national landscape of partnerships and reviewing the research literature for innovative ideas to assimilate into their own plans, the BOA leaders discovered another group, The Strive Partnership in Cincinnati, Ohio that was also developing their own educational pipeline. The Strive Partnership had begun through dialogue between the University of Cincinnati, Nancy Zimpher, and Chad Wick, then CEO of KnowledgeWorks, an education foundation beginning in 2006. Conversations between Paul Grogan of the Boston Foundation and Nancy Zimpher, who was co-leading the Cincinnati work with other area college presidents and public school districts, helped promote ideas for the Boston group. While not identical, both groups were planning support for students on a continuum. A key difference between the initiatives was that the roots of STRIVE's work were bringing together a team of 300 local Cincinnati organizations, many at the provider level to discuss community needs, and the Boston group had initiated the conversation with a smaller group at the funder level (The Bridgespan Group, n.d.). Nevertheless, the conversations with STRIVE and partnerships in other cities were all part of the learning process as plans for the BOA crystallized.

While the group was galvanized by the promise of this developing partnership, there were setbacks during the partnership formation. Initially, ideas centered around creating an ambitious funding pool with resources reaching $100 million that would be used to scale up initiatives that were shown to be effective. This concept stalled for a few reasons. One, the financial crisis of 2008 developed and scaled back funders' ability to contribute at such ambitious levels. Secondly, individually the foundations and funders were struggling to rectify the tension between maintaining levels of financial support on their own individual projects with the needed support for this new initiative. Lastly, concern from Mayor Thomas Menino about the absence of other stakeholders were expressed including the Boston Public Schools and other philanthropic organizations like the Barr Foundation that support education. After approximately 18 months of meeting (now mid-2008), the leaders determined they had developed this idea for partnership as far as they could. At this point, the leadership group decided that they needed help and thus reached out to DCA Consultants, led by Steve and Beth Greeley, to assist.

DCA Consultants, beginning in 1991, had developed a cause development methodology to assist leaders and organizations to collaborate and partner to tackle social issues, particularly in the economic and workforce development and health sectors. Their typical clients have included leading foundations; domestic non-profits and international NGOs; corporations; workforce development and economic development entities; municipalities; and leadership coalitions.

The consultant team, invited by Tiziana Dearing (Catholic Charities) and Mike Durkin (United Way) was familiar to several members of the initial leadership group as DCA had previously worked for Thrive in Five, a public-private partnership established in 2008 centered on ensuring all children in Boston were "school ready" when they entered kindergarten. Thrive in Five partnership was led by the United Way, now a member of the emerging BOA, and was supported by the Barr and Boston Foundations as well, so relationships had been formed. Recruited as facilitators, it was the Greeleys' task to help the leadership group move forward as the group's momentum had stalled.

This familiarity was something that Steve Greeley hoped to foster through his team's facilitation, as he described, "This is a group of people that lead and answer to very powerful institutions, separately. They needed to develop a new, collective relationship and we felt that the best way to do that was to get to know each other through the work…" (S. Greeley, personal communication, June 2015). Additionally, DCA focused on determining and creating, along with the leadership group, an effective process for moving forward as the previous process had slowed. As Steve Greeley recalls being told as he and his team interviewed partnership participants, "what would be really valuable would be for them [DCA] to help us and pursue some clear goals, and to bring people together to develop the strategies and partnerships to achieve those goals, and basically, it came down to that" (S. Greeley, personal communication, June 2015). These goals were then translated into guiding principles for the budding partnership.

The leadership group took on many responsibilities and the consultants endeavored to help the group as the partnership matured. One was the establishment of Reverend Hammond as the chairperson of the Opportunity Agenda and a clarification of his role. As a person who had held positions on the board of directors with the Boston Foundation and the United Way, the Reverend was someone held in high esteem by the partnership members. His work centered on setting the meeting agendas, along with the Executive Director, Kristin McSwain (once she was hired in 2011); supporting the executive director's work, and fostering an atmosphere for everyone's voice to be heard both in the formal meetings and via communication outside of meetings. Hammond was acutely aware of the demands and responsibilities of each CEO with their respective organizations and thus worked to support their participation in the partnership as well as the dynamics of collaboration (R. Hammond, personal communication, April 2015).

With his responsibilities established, the leadership group defined their decision making process so that the working groups would have clarity around how the partnership operated. Essentially, each initiative on the pipeline was supported by a working group and was chaired by a representative from the leadership group and this group would report back to the partnership group at large. This process will be described in detail subsequently when I discuss "Perceptions of Success" later in this chapter.

This idea of a pipeline served two purposes. First, it would allow the funders to reach a broad scope of students from different age groups and provide continuous and theoretically seamless support. This continuum would help coordinate the services provided at the various age levels. Second, it supported the group's decision that their emphasis needed to be larger than just programs. The Opportunity Agenda was looking to be strategic and looking for opportunities for larger-scale systems-change within each particular space on the educational timeline. The logic was that providing their support in this fashion would realize a larger impact.

Another critical decision that the leadership group made was to fund the capacity to manage the work, paying DCA Consultants for the first two and a half years of the partnership development work and then allocating capital for an executive director position beginning in 2011. This meant that there was a dedicated staff person(s) for the BOA providing the glue to the work with additional staffing support from the various partner organizations. The funding of this position was based on a rough formula of how much each organization anticipated contributing to the Opportunity Agenda at large. Finally, the group decided that this concept would not be a new entity, instead it would be a true partnership with shared responsibility (S. Greeley, personal communication, June 2015).

At the outset, the partnership strictly involved local foundations and, as such, would properly be characterized as a private partnership. Absent from this educational initiative were the City of Boston and the Boston Public Schools. Through the facilitation process, DCA Consultants realized that, "the leadership group wanted to commit to a public and private partnership, but the public partnership was the new aspect to this. The Mayor's Office needed to be directly involved as well as the school district needed to be directly involved in this, because they had critically important roles in terms of policy, funding, and strategy. In retrospect, the feeling might have been, ‘Well, how could they not have been, you are talking about education?,’ but because it came together from the standpoint of what philanthropic funders could do with their money, it's understandable how they would have started that way,” Greeley noted (S. Greeley, personal communication, June 2015).

That isn’t to say that these foundations had no experience working with public entities. For instance, two partnerships that predated the Opportunity Agenda, which ultimately were folded into the partnership’s pipeline, Thrive in Five and Success Boston, both represented joint efforts between Opportunity Agenda funders (United Way, Boston Foundation, the Barr Foundation, and CJP) and the city of Boston. Subsequently, a joint declaration by Dr. Carol Johnson and Mayor Thomas Menino about “The Circle of Promise'[8]' in February 2010 may have foreshadowed the BOA to the public. Though distinct from the BOA, Cronin (2011) described “The Circle of Promise” as an effort to bring 140 government agencies, community and non-profit organizations to work more collaboratively to improve educational, social and family services for the most challenged Boston neighborhoods. Loosely using the Harlem Children’s Zone as a model, the Circle specifically focused on areas of Dorchester, Roxbury and the South End where 10 of the worst performing schools of the BPS district resided. Designed to provide services for families with children from infancy through high school, the early funders included Opportunity Agenda members such as Nellie Mae, the Barr Foundation, the Boston Foundation and The Beal Companies.

---

[8] The Circle of Promise was one part of Superintendent Johnson’s Acceleration Agenda. https://www.bostonpublicschools.org/cms/lib07/MA01906464/Centricity/Domain/31/AccelerationAgenda.pdf

While the planning for the BOA was clearly well underway prior to the announcement of the Circle of Promise, the initiative illustrated the BOA partners' willingness to work together. It also demonstrated Boston's capacity to engage in longitudinal support of Boston children, though only in certain sections of the city and not through college. The Opportunity Agenda would prove to be an expansion of this model geographically (the whole city) and by educational span (Birth to Adult).

Thus, it is curious that initially this group was strategizing on how best to improve the education of the residents of Boston without the inclusion of the city schools and the city. There are some possible explanations. First, some members may have felt that the Boston Public Schools was in need of reformation and was, as such, seen as part of the problem, not the solution. Secondly, others who saw the group as a more efficient way to leverage their individual investments may have focused on developing the synergy of the funding group before looking outward.

The shift in how the partnership was envisioned, as well as constructed, coincided with the outreach to other organizations passionate about education. The conversation with the mayor's office about the partnership resulted in reflection after Mayor Menino wondered aloud, "why the city wasn't at the table, wondered why the schools weren't at the table, wondered why the Barr Foundation, one of the largest education funders, certainly, in town, and others weren't participating" Elizabeth Pauley (Boston Foundation) described. This reflection spurred a reexamination of the partnership and the leadership asked the questions, "Who should be at the table? What are we really trying to do? What's really possible?" Pauley noted (E. Pauley, personal communication, March 2015).

As a direct result, the table for planning expanded as the Mayor's office represented by his chief of staff, Judith Kurland; the superintendent of Boston Public Schools, Dr. Carol Johnson; the Barr Foundation's president Pat Brandes; Vanessa Kirsch of New Profit, Inc.; Nick Donohue of the Nellie Mae Foundation, and Andrea Gilbert of the Eos Foundation all joined. Pauley offered, "I don't recall it being a hard sell for anybody because I think people looked at the table and they're like, 'Wow, this is a table I want to be at.' Particularly, once the superintendent came because then we have this direct line into the schools" (E. Pauley, personal communication, March 2015). With a broader range of core partners involved, the group drove the necessary work towards the official launch of the Boston Opportunity Agenda in June 2010.[9]

Deciding on Which Spaces to Focus

Having come to agreement on the concept of the educational pipeline, the group needed to determine the key areas within a kindergarten to adult educational spectrum that the partnership would support. As Steve Greeley remarked,

> …Taking that principle of being systemic, the other thing that we had to think about was how to address such a broad educational system- birth through adulthood? What we felt needed to be done, was to focus efforts where at any given point in time there

[9] The core partners at the launch were Barr Foundation, The Beal Companies, LLP, The Boston Foundation ,Boston Public Schools, Catholic Charities of Boston, City of Boston, Combined Jewish Philanthropies of Boston, Eos Foundation, Robert & Myra Kraft Family Foundation, Nellie Mae Education Foundation, New Profit Inc., United Way of Massachusetts Bay and Merrimack Valley.

was the greatest potential to make system improvement through a partnership approach. (S. Greeley, personal communication, June 2015)

In terms of the goals themselves, Greeley described this process with the leadership group. “We don’t want them just to be aspirational; we want them to really focus on achieving realistic outcomes. We wound up actually having the group really push hard on this, and I think all of the members felt that the goals needed to be time-specific. They also needed to have goals for each aspect of what they referred to as the pipeline.” (S. Greeley, personal communication, June 2015). Ultimately, the group determined that the four areas on the cradle to career educational timeline on which BOA would focus were: early childhood, grades K-12, college, and adult learners.

Deciding on Metrics

With the spaces determined, the next step was deciding what initiatives and metrics would the BOA use to measure the partnership’s impact. The process for this determination utilized all of their expertise. The group considered Superintendent Dr. Carol Johnson’s Acceleration Agenda (2009-2014)[10] for the Boston Public Schools, the experiences of the individual CEOs and their organizations, and research to determine the areas that they could support; and the initiatives that they could remember, measure and hold themselves accountable for. These initiatives were then to be funded with partnership dollars. Pauley describes the competing priorities in determining the metrics, “It was definitely research-based, but it also would not be wholly true to say it was only research. It was what was

[10] https://www.bostonpublicschools.org/cms/lib07/MA01906464/Centricity/Domain/31/AccelerationAgenda.pdf

important to Carol Johnson. Where were the funders around the table already really invested, if not financially invested, then intrigued by, or focused on? What was the mayor particularly committed to as well? It was very organic, but there is a research base behind it" (E. Pauley, personal communication, March 2015).

Organizing the Work

In order to facilitate the identification of these goals and metrics, the group organized themselves into four sub-groups aligned with the areas in the pipeline designated for support. These sub-groups, or working groups, were each chaired by one member of the leadership group (as shown in table 5). This ensured accountability from the working groups to the larger leadership group.

Table 5
Chairing Organizations for Pipeline Working Groups

A Strong Educational Foundation	Kindergarten-Grade 12	High School & College Completion	Post Secondary Attainment
United Way	Barr Foundation	Boston Foundation	Combined Jewish Philanthropies

Note. Table adapted from information from the First Annual Boston Opportunity Agenda Report Card, 2011

The working group chairs largely were self-selected and the process was generally smooth. However, one area that no organization selected was the adult learning space. This impacted its effectiveness going forward. As Greeley remembers, "There was one group where nobody self-selected, and we wound up having to initially get a Chair from outside the group, and that was the adult education area. It suffered for that, because there just … there was no natural advocate among the partnership leaders". In this instance, Jerry Rubin of Jewish Vocational Services, was recruited to lead this adult learning space before ultimately turning it over to Barry Shrague of Combined Jewish Philanthropies. The structure designated that each working group develop plans for its component of the pipeline and bring those plans back to the leadership group for vetting and approval.

These spaces within the cradle to career pipeline were targeted through specific initiatives: Thrive in Five, the Summer Learning Project, Success Boston and the Adult Opportunity Network. While these chair organizations took the lead in these spaces, their organizations also participated in the planning of other areas on the pipeline in accordance with the alignment of expertise, interest and capacity of the organization. (See table 6 for partner involvement in initiatives).

Table 6
Partners Involved in Partnership Initiatives

Space on Educational Pipeline	Initiative to Support	Chairing Organization	Partners Involved
"A Strong Educational Foundation" (Early Childhood)	Thrive in Five	The United Way	The United Way City of Boston (Boston Public Health Commission) The Mayor's Office
"On Track for High School Graduation" (K-Grade 12)	The Summer Learning Project	The Barr Foundation	The Barr Foundation Boston Public Schools Boston After School and Beyond
"High School and College Completion"	Success Boston	The Boston Foundation	The Boston Foundation Mayor's Office City of Boston Boston Public Schools Private Industry Council UMass-Boston
"Post-Secondary Attainment" (Adult Learners)	The Adult Opportunity Network	Combined Jewish Philanthropies	Combined Jewish Philanthropies Kraft Foundation

Note. Adapted from information presented in the Boston Opportunity Agenda First Annual Report Card, 2011

While the BOA was a partnership created by the initial leadership group, the partnerships leading each initiative nestled under this umbrella were brought in two different ways. One strategy was to co-opt an already established partnership or network working in the educational space. In this process, the BOA works with existing networks by bringing additional members to the table, advancing the data work, or placing the work in the context of the education pipeline, in order to drive the work. Specifically, Thrive in Five and Success Boston's existence predated the launch of the Opportunity Agenda and were folded into the larger partnership continuum. Individually each of these partnerships (Thrive in Five and Success Boston) had been formed to address educational needs in the city and impelled by Mayor Thomas Menino. Thrive in Five's effort was to prepare *all* of Boston's children to be ready for success as they entered kindergarten. The partnership's work was to catalyze the conversation in the early education space and to coordinate efforts between the Boston Public Schools, early education providers, health organizations and the families themselves. Thrive utilized three main strategies to achieve their objectives: Boston Children Thrive – Family engagement through parent leadership; Ready Educators – Improving quality in early education and care; and Screen to Succeed – Empowering families, organizations, and communities through child development data (Friedman, Coonan, Douglass & Carter, 2016). Their systematic approach to the issue of early education complemented BOA's emphasis on systemic impact. This particular initiative wound down its operations at the end of 2016 but a new collaborative called the Birth to Eight Collaborative was formed as an extension of Thrive's efforts and is supported by the Opportunity Agenda. This transition is discussed in the "Updates to the Initiatives" section later in this chapter.

Another example of co-option of an existing initiative is Success Boston. Success Boston was launched as a response to a 2008 Northeastern University Labor Studies Report that presented alarmingly low levels of college completion rates for graduating Boston Public

School students.[11] The partnership focused on improving these rates of college completion by coordinating coaching services for BPS students. These coaches assist students with the application and acceptance into college but also provide support to help keep students enrolled. These two partnership's missions aligned well with the mission and strategic goals of the emerging BOA and BOA looked to leverage these groups for greater impact.

The second strategy for the BOA is to build new networks that coincide with gaps along the education pipeline. In contrast to Thrive and Five and Success Boston, the Summer Learning Project would be constructed by representatives from various partners within the BOA's membership along with stakeholders in the community and would represent something newly formed. Finally, the Adult Learning Network was never fully materialized and would later be discontinued as a formal initiative in 2014, though work in the space of adult education would continue. Again, these initiatives will be updated and discussed in more detail later in the section.

Once the initiatives were established, decisions concerning which benchmarks or metrics to be used proved difficult. "Actually, I think something that the CEOs struggled with was the narrowing. We could have thirty-six indicators of performance related to early childhood. We could have prenatal health and no one could argue that that doesn't matter, but we needed the public and each other to be able to remember, this is what we're working towards." As Pauley further explained, "we believe that if we have a goal, everybody should be able to remember what it is" (E. Pauley, personal communication, March 2015). The

[11] Full report is here: https://www.tbf.org/-/media/tbforg/files/reports/pic-report.pdf?la=en

metrics came from a variety of sources. For example, 3rd grade reading proficiency was a benchmark that research says is important to future success (Annie Casey Foundation, 2010), while benchmarks like MCAS data and high school graduation rates were common metrics readily available to the partners and represented the vast majority of students in Boston. The narrowing process was an issue that each working group grappled with during planning. Largely influenced by Superintendent Carol Johnson's Acceleration Agenda (K-12) metrics and bookended on either end, eventually each spot on the education pipeline had benchmarks, which would be measured and then provided publicly to ensure accountability. (See table 7).

Table 7
Initiative Metrics (2010)

Space on Educational Pipeline	Initiative	Benchmarks
A Strong Educational Foundation	Thrive in Five	1. Early Literacy (Dibels) 2. Reading Proficiency in 3rd Grade
On Track for High School Graduation	The Summer Learning Project	1. 8th graders taking Algebra 2. Students receiving a B or better in 8th grade math
High School and College Completion	Success Boston	1. Passing all MCAS tests in grade 10 2. Annual Dropout Rate 3. 4 year high school graduation rate
Post-Secondary Attainment	The Adult Opportunity Network	1. BPS grads with an associates degree or higher 2. Adult learners entering higher ed institutions

Note. Table adapted from information in the BOA First Annual Report Card, 2011

As the dawn of the partnership approached, the partners agreed to three principles to guide their work. These principles were:

1. Keeping key performance measures in public view is critical to driving change.
2. Our investments must produce immediate gains and long-term system change.
3. Collective impact is required to achieve our goals.

(Boston Opportunity First Annual Report Card, 2011).

With three years of planning and the pipeline in place, the BOA was publicly launched at the Lilla G. Frederick Pilot School in Dorchester, Massachusetts on June 22, 2010.

Summary of the Boston Opportunity Agenda Formation (2007-2010)

As was discussed in the previous section describing the formation of the BOA, core partners became involved in a few different manners at different stages leading up to the launch. Initially, there were partners that were involved in dialogues centering on the desire to strategically partner to leverage their funding. These partners were a part of the conversation and planning from the onset in late 2006-2007. These core partners included the Related Beal Companies, the Robert & Myra Kraft Foundation, the Boston Foundation, the United Way of Massachusetts Bay and Merrimack Valley, the Combined Jewish Philanthropies and Catholic Charities. Subsequently, due to a combination of appeal by then Mayor Thomas Menino and the recognition by the established partners of the value of expansion, the table of partners was enlarged. Public entities, the city of Boston and the Boston Public Schools, were added and other foundations supporting education in the area, the Nellie Mae Foundation, New Profit, Inc., and the EOS Foundation, were identified and brought into the fold in 2008. Over the span of roughly two years, this core partnership group finalized a plan to support an educational pipeline to support students from cradle to career. This agenda included developed high impact initiatives at four selected priority spaces on this pipeline and agreed upon metrics and benchmarks to measure progress. The diligent work of these core partners formally launched the BOA in June, 2010.

The Partnership Development (2010-2019)

Introduction

The previous section detailed how the BOA was formed and ultimately launched in June 2010. A summary of the people, partner organizations, and events during that formation process brought understanding of its realization. This section explains how the partnership has evolved from that launch. The time period that frames these findings is 2010 (the public launch of the BOA) to the publication of the 8th Annual Report Card in 2019. Subsequently, additional shifts to the partnership including terms of partner membership, board representatives, values, and metrics that occurred after this time frame and thus are not included here.

These shifts are a natural progression of partnership. A partnership as pioneering and complex as the BOA would expect to adapt and change over time. In this section, I describe shifts in some key components of the partnership, specifically membership, initiatives, and metrics in the years of 2010-2019.

Updating the Membership in the Partnership

Overall, the membership of the BOA has remained remarkably consistent. Additional partner organizations have joined, and dropped, over the following nine years. EOS Foundation would discontinue its participation in the partnership after two-three years, reportedly feeling it had achieved its objectives. The other original 11 members have remained. The Lynch Foundation joined in 2014, the same year as Umass-Boston, and then left by the following year as the director's visions were not aligned. A new philanthropic partner in the form of the Angell Foundation[12] was added to the group in 2018. This was the same year as the Boston Charter Alliance and the Archdiocese of Boston Catholic Schools Office formally joined the group, as recognition grew within the partnership of the desire to focus on all school aged children and not exclusively those attending public schools.[13]

In some instances, while the partner organization has remained constant, there have been updates in the organization's own leadership and thus resulting in changes to the BOA board membership. Figure 3 illustrates the leadership (Organization and Representative) of the BOA at the two time frames: 2008-2010 and the updated membership in 2019.

---

[12] Angell Foundation invests in transformative opportunities, cultivates compassionate leaders, and partners with organizations committed to creating a more equitable world. It funds high-impact efforts that effect change in three main issue areas: Education As Opportunity, Food Equity, and Transformational Leadership. Assets (2017 EOY): $124,116,224 (IRS, Form 990, Angell Foundation, 2017)

[13] The Boston Children's Hospital and The Smith Family Foundation were added as core partners in 2021.

Figure 3
BOA Leadership and Representative

Worth noting here is the absence of a formal entry or exit process for members in the partnership. While membership has remained relatively steady, there have been a few instances of members departing as well as new members joining as noted above. This study revealed no articles of partnership or other documents that described how and when members enter the partnership nor the circumstances in which they leave and interview subjects consistently reported an absence of a formal procedure. This lack of explicit understanding may subject the partnership to uncertainty as it operates with member participation largely based on trust. Further discussion of this facet of the partnership will be presented in chapter six.

Initial Analysis of Membership Updates

As noted, the partners involved have remained consistent as of the 9th year of existence with 11 of the 12 founding member organizations still remaining and in many cases led by the same CEO (though there are instances of delegates participating in meetings in the place of the CEO)[14]. Thus, a formalized procedure for partners to discontinue their involvement has largely been unnecessary. However, partners have expressed that episodically there were check-ins to see if partners are indeed still invested in the collaborative. There was one formal "check-in" during the partnership's tenure. After the first five years of existence (2010-2015), a retreat was held among the partnership leaders in 2016 to ascertain and reaffirm commitments to the Opportunity Agenda and its vision. However, a more formal process for partners to disengage in the partnership may be of value if circumstances shift and the partnership faces more turbulence and turnover.

Further explained, implicit in a formal disengagement process is a commitment component. As an example, if the process for leaving the partnership requires 12 months notice, then the partnership can anticipate 12 months of commitment at any given time from partners. The ability to depend on the partners participation impacts a number of partnership components; planning and strategy, funding, just to name a couple. This stability has real benefits to the partnership in the areas of trust development, focus on the partnership's core

[14] As of 2019, CEOs still in place since inception include Paul Grogan (Boston Foundation), Deborah Rambo (Catholic Charities), Nick Donohue (Nellie Mae Foundation), Michael Durkin (United Way), Vanessa Kirsch (New Profit).

initiatives, institutional buy-in, and organizational learning. Here, I discuss these benefits in more detail.

During the formation phase of the partnership, Steve Greeley noted that the CEOs of the partner organizations knew of each other but did not know each other well. He hoped that their work together would solidify these relationships. Logically, nine years of working together has not only familiarized the CEOs with one another but developed a level of trust. Trust in partnerships has been demonstrated in the literature (Dhillon, 2013) as a characteristic of successful partnership.

Consistency with membership has also fostered the group's ability to "stick" with the issue that they had identified and remain focused on their core initiatives. Elizabeth Pauley of Boston Foundation remarked about the Success Boston initiative, "The nice thing about foundations…since we have staying power, we can stay with an issue, but as you may know, foundations are reputed to not do that" (E. Pauley, personal communication, March 2015). While this reputation may be warranted, the consistency of BOA's membership has demonstrated this phenomena of staying with issues.

Furthermore, institutional buy-in from the partnering institutions has likely resulted from the steadiness in leadership. This occurs on two fronts. First, other leaders within a particular organization are receiving a message from the CEO either implicitly or explicitly that the BOA is important. It brings meaning and purpose to any involvement in BOA by staff level members. Second, it smooths the way for incoming CEOs as leadership changes occur. The partnership has needed to transition some CEOs in fact over the years as James

Canales replaced Pat Brandes at Barr Foundation in 2014, Rabbi Marc Baker replaced Barry Shrage at CJP in 2018, as well as the change in mayoral leadership (Mayor Martin Walsh taking over the position vacated by Thomas Menino in 2014) and the Boston Public School superintendency (5 leaders during the time of Opportunity Agenda existence). This high degree of superintendent turnover will be discussed in chapter six.

While a new leader of an organization can always affect change upon assuming the role, if his/her institution has a long standing membership in a partnership, they are more likely to maintain that partnership commitment. The fact that there is institutional buy-in from the organizations individually (and the capacity that results from this) and buy-in to the partnership overall reduces the energy and resources being utilized on the leadership transition and allows the group to remain focused on the work.

As mentioned, the partnership has added a few members in the time span of 2010-2019. In addition to foundations, there has been increased representation from education entities. The formal addition in 2018 of the Catholic Schools Office (The Archdiocese of Boston) and the Boston Charter (School) Alliance helped to better match the ideals of supporting and preparing all Boston residents to succeed educationally and be prepared for the workforce. By including the Boston Charter and Catholic Schools that Boston children attend, the BOA is able more accurately present data[15] from the groups as well as include the voices of those entities' leadership through board membership. Finally,

[15] Charter and Catholic School data was introduced to the Boston Opportunity Agenda report card beginning in 2015 (Fourth Annual Report Card) but their formal representation on the BOA board began in 2018.

the BOA uses the same metrics in their annual report cards on progress (as it is able) to measure the progress of all three student groups and comparisons can be made.

This expansion was deemed necessary as non-BPS students represent nearly 29% of the school aged children in Boston and total approximately 21,626 students. By including the Charter School students (10,356 students)[16] and Catholic School students (3,730 students) in their data collection, the partnership is improving the quality of their data. That being said, there are still pockets of students not included in the measurements as not all of the non-BPS students are attending a Charter or Catholic School. Metco students[17], along with private schools account for nearly 7,000 of these non-BPS students with BPS special education students placed in non-BPS settings and a small group of home-schooled children encompassing the remaining numbers. Figure 4, Figure 5, and Figure 6 illustrate these student populations and BPS breakdown by grade level.

---

[16] Horace Mann Charter Schools are funded by BPS and are included in the BPS population totals

[17] Metco (The Metropolitan Council for Educational Opportunity) is a Massachusetts state funded program that promotes diversity by allowing Boston and Springfield students to attend schools in participating suburban districts.

Figure 4

A Comparison of BPS Versus Non-BPS Student Enrollment (2018-2019)

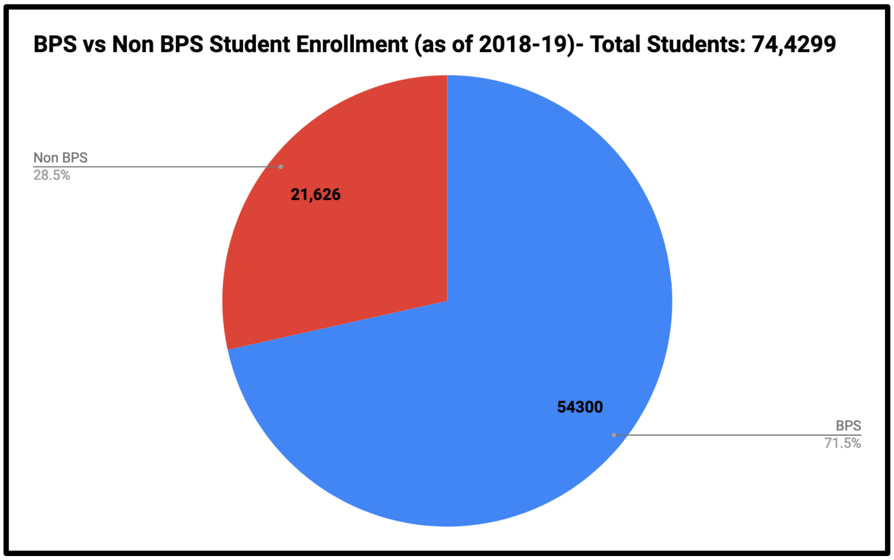


Figure 5

BPS Student Enrollment by Grade Level (2018-2019)

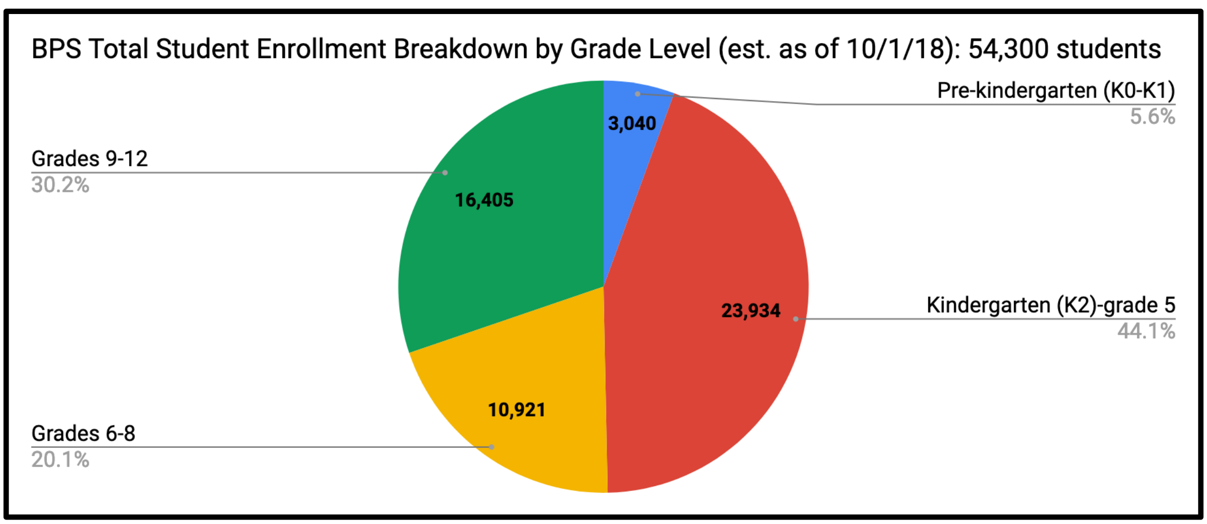
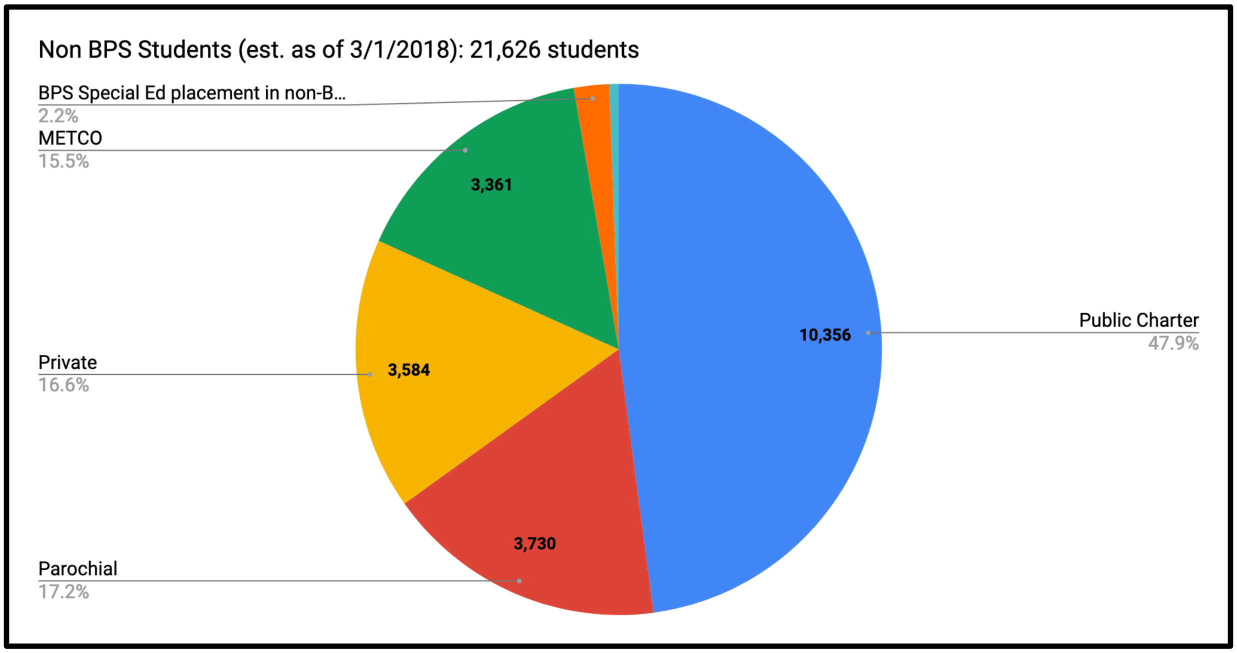


Figure 6

Non-BPS Student Enrollment (2018-2019)



Note. Information in Figures 4, 5, 6 is adapted from BPS At A Glance: 2018-19

The side by side measurement does more than widen the partnership's data pool. It also can bring accountability to each section of education: BPS, Charter and Catholic. Particularly, the BPS may come under increased critique as their statistical numbers typically fall short of their counterparts.

Interestingly, the evidence suggests that the Boston Public Schools is the primary target for the BOA and to a lesser degree, the other types of schools in the partnership, despite their inclusion. Several of the signature initiatives (Summer Learning Academies, Opportunity Youth and Success Boston specifically) only explicitly target BPS students and don't mention Catholic and Charter school students. There is no evidence that students from these school systems are prohibited from participation but the student recruitment processes for these initiatives reside largely in BPS institutions. Opportunity Youth is composed of high school dropouts (though not exclusively) and according to the Boston Opportunity Agenda 2019 Report Card, Charter schools (1% dropout rate in 2017-18) and Catholic schools (listed as N/A) have really low numbers of those.[18] Some other initiatives, the Birth to Eight Collaborative[19] (formerly the Thrive in Five initiative) and the adult learning efforts such as SkillWorks, affect change outside of the K-12 schooling space (though not exclusively) and so these are likely more open to all children.

The Opportunity Agenda literature explains that the inclusion of this data better represents the statistics of Boston students. This is logical as the combination of BPS, Charter Schools and Catholic Schools educate approximately 92% of Boston students and thus provide fuller data across the metrics along the pipeline. The incorporation of these school types give the appearance that the BOA is serving all Boston students but as described above, the Catholic and Charter school students aren't offered the full complement of Opportunity Agenda initiatives. If those initiatives were more inviting and accessible to all Boston students, the partnership may be able to more fully impact the data along the pipeline. Essentially, the BOA is measuring all three groups of students but only offering its full support to BPS students. This strategy may be a reflection of funding levels limiting the number of students serviced for particular initiatives or as one senior BOA leader

---

[18] However, struggling students from Charter Schools and Catholic Schools often are counseled to return to Boston Public Schools and in some instances, subsequently drop out.

[19] There are 3 initiatives that only include BPS students

acknowledged, BPS students are perceived to be the most vulnerable compared to the other school types and thus in most need of support.

The inclusion of Charter Schools and Catholic Schools as members with seats on the partnership board may point to the significant relationships between the BOA leadership and the leaders of the "new" Boston Compact (made up of BPS Executive Cabinet members, area Charter School Executive Directors and Catholic School Principals, among others)[20]. The new Boston Compact prioritized the dissolution of competition and distrust between the various school systems and pledged to work in a more collaborative spirit. The invitation from BOA to these entities may be an extension of this same impetus. Their inclusion also improves the accessibility to the data of those school systems.

While this discussion has focused primarily on the addition of the Catholic and Charter Schools, the larger question of how partner expansion is undertaken is unanswered. Similar to the question of partners disengaging from the partnership, this research hasn't discovered any formal process for the addition of new partners to the table. More discussion of this will be addressed in chapter six.

Updating the Initiatives

Similar to the growth of the partnership through expanded membership, the BOA has updated their initiatives moderately over the years of existence (2010-2019. These updates

[20] The New Boston Compact formed in 2011 has no formal connection to the previous Boston Compacts discussed in this paper.

involve advancements of original initiatives as well as initiatives introduced after the partnership launch in 2010. Two tables show these updates below.

Table 8
Updates to Original Partnership Initiatives

Space on Timeline	Initial Initiative	Updated Initiative
Solid Educational Foundation	Thrive in Five	Birth to Eight Collaborative
On Track for Graduation	Summer Learning Project	Summer Learning Academies
High School & College Completion	Success Boston (Getting In, Getting Ready, Getting Through)	Success Boston (Getting In, Getting Ready, Getting Through, Getting Connected)
		Opportunity Youth
Post Secondary Attainment	Adult Opportunity Network	Opportunity Youth
		SkillWorks
		Lumina Talent Hub

Table 9
Additions to Original Partnership Initiatives

Space on Timeline	Additional Initiative (Supplemental)
High School Completion	High School Redesign
High School & College Completion	Defining Criteria for College and Career Readiness

Note. Info in table adapted from 2011, 2019 Annual Report Cards

Initial Analysis of Initiative Updates

Originally, the BOA established four major initiatives to support their cradle to career design. These initiatives included: Thrive in Five (Solid Educational Foundation), The Summer Learning Project (On Track to Graduation), Success Boston (High School and College Completion) and the Adult Learning Network (Post Secondary Attainment). In this section, I briefly update the initiatives as of 2019. As noted in earlier sections, some additional updates have occurred after 2019 and are not included here.

Thrive in Five now Birth to Eight Collaborative

Thrive in Five predated the BOA and was originally launched in 2008 as a partnership convened by the City of Boston and the United Way of Massachusetts Bay and Merrimack Valley. This partnership had been created out of a lengthy and public process. With 65 stakeholders on the planning committee (Action Planning Committee) and hundreds more engaged, 2008 marked the beginning of the group's efforts to coordinate existing entities to "…align[s] families, educators, health care and human service providers, the private sector, and city departments working in collaboration with state agencies to ensure that all children will be ready for sustained school success". In the press release from the City of Boston, the report cited a financial commitment of $750,000 from the city; $1.3 million from the United Way; and three lead partners in the effort -- Children's Hospital Boston; Partners HealthCare and its founding hospitals, Brigham and Women's and Mass. General Hospital; and the Nellie Mae Education Foundation -- have committed another $1.2 million over the next three years

(City of Boston Mayor's Office Press Release, 2008). The work of the partnership progressed until leaders made the decision to discontinue its work at the end of 2016.

Out of this model, the BOA has convened and facilitated a group, titled the Birth to Eight Collaborative, that includes parents and more than 200 representatives from early education centers, family day-care, nonprofit organizations, schools, public health, philanthropy and medical institutions. The metrics for this initiative have remained consistent between the two initiatives as both measure progress based on DIBELS scores (the % of kindergarteners entering school demonstrating early learning skills) and 3rd grade reading proficiency (% of students scoring exceeding or meeting expectations on 3rd grade MCAS). These metrics guide the group's work to ensure that students are prepared and ready to learn when they reach kindergarten and that they have the basic reading skills necessary as they enter the 4th grade where students begin to "read to learn". By reframing the initiative to extend to age 8, this better reflects the measurements that are being used to determine progress. Previously, Thrive in Five partnership framed their work as preparing students for kindergarten (aged 5) and the use of the 3rd grade reading metric appeared out of the scope of their work. The Birth to Eight Collaborative work is also more reflective of the title of the group as the collaboratives three desired outcomes include students aged 5-8. These outcomes are listed below.

- **OUTCOME 1**: All children ages birth to three experience a healthy start and healthy development.
- **OUTCOME 2:** Early education and care providers build curious, confident and involved three- to five-year-old learners.

- **OUTCOME 3:** Students ages five to eight are ready for sustained success.

Finally, the Birth to Eight Collaborative recognizes the need to target health interventions more intentionally. While Thrive in Five's work included child development support, Birth to Eight brings intentionality to work more closely with the medical community as well as the city, lessons learned from the Thrive in Five partnership (Boston Opportunity Agenda Report Card, 2017).

The shift from Thrive in Five to Birth to Eight is explained by several factors. First, the shift matched their initiative to the movement nationally to focus on birth to eight; it allowed the group to connect several promising local efforts: Boston Basics, a parent education campaign targeting low-income parents of infants to three year olds; Screen to Succeed, a developmental screening initiative based at the United Way of Massachusetts Bay and Merrimack Valley; and Boston Mayor Martin Walsh's efforts to improve kindergarten readiness by expanding access to high quality pre-kindergarten; and finally, it provided an avenue to connect early education metrics to grade three success.

Summer Learning Project Now Summer Learning Academies

As discussed, the Summer Learning Project represented a new network created by the BOA along with leadership from the Boston Public Schools, Boston After School and Beyond, and the Barr Foundation, among others. The first summer of the project 2010 corresponded with the public launch of the BOA partnership itself. This initiative was designed as a support to the BOA's educational pipeline goal of "On Track for High School

Graduation". Over the subsequent years, the Summer Learning Project has expanded its reach immensely from five schools and 232 students in 2010 to a projected 2019 student reach of 14,000 ("Summer For All", Boston Beyond, 2019). Initially, the Summer Learning Project was a co-construction of a new and fresh look at programming to address summer learning loss. The traditional summer school of remediation was reexamined and a recognition of the city as a classroom was imagined. But as a partnership interested in systems change, the Opportunity Agenda framed this issue to support this. For example, the Summer Learning Project could have been just a program for kids to do summer activities/programs. The funders along with BPS shaped it so that it has changed the system of summer learning. Traditional summer school in Boston isn't extinct but it is just one of many options now here in the city. And in most cases, it's not the first option for students. The Boston Public Schools and Mayor Walsh now termed summer as the "5th Quarter" of Learning and the Summer Learning Academies reflect this belief of academics mixed with social and emotional growth in a range of settings around Boston to be critical to student success. This growth of the initiative shows a change of system for this area of the educational pipeline.

From my perspective, BOA as a thought partner and provocateur of the Boston Public School system is an efficient use of their resources. The Summer Learning Project illustrates this induction and incubation of new ideas to the system. What began as an initiative with external partners has been institutionalized by the Boston Public Schools and Boston Mayor Walsh. While introduced here, the idea of the BOA as a thought partner and incubator of ideas in partnership with the Boston Public Schools will be discussed further in chapter six.

Success Boston Now Expanded Success Boston and Opportunity Youth

The high school and college completion portion of the timeline has been expanded. While Success Boston has remained since its inception (although with an additional strategy-"Getting Connected"), the Opportunity Youth collaborative also targets this section of the timeline with its focus on individuals aged 16-24 who are not connected to education or employment. As previously stated, Success Boston is another initiative, similar to Thrive in Five, that was in existence prior to the BOA. Essentially, it is the city of Boston's college completion initiative. It is a public-private partnership driven by the Boston Foundation, the Boston Public Schools (BPS), the City of Boston, 37 area institutions of higher education led by UMass Boston and Bunker Hill Community College, the Boston Private Industry Council and local nonprofit partners. Originally, the group focused their efforts on three main strategies: Getting Ready, Getting In, and Getting Through. "Getting Ready" recognized the need for BPS students to be prepared to handle the rigors of college and is largely the responsibility of the Boston Public School district; "Getting In" focuses on helping students, particularly those of color and first generation to college, identify, apply, and gain acceptance to secondary education institutions and is led by the Boston Foundation; and finally, "Getting Through" ensures students earn a degree through the commitment of 37 local colleges to provide the necessary supports. The group's success is tangible. Since its inception, the 6 year graduation rate has increased from 35% to 52% (Reaching for the Cap and Gown, 2016). This particular initiative has added a 4th strategy more recently- "Getting Connected". This strategy, led by the Boston Private Industry, supports college completion by engaging the business community to provide internships, summer jobs and other exposures to career pathways. By design, the students now graduate from secondary education institutions with connections to opportunities in gainful employment. This last strategy serves as an explicit connection to the career space of the cradle to career pipeline that was in the formative years of Success Boston's existence.

An additional initiative is introduced here: the Boston Opportunity Youth Collaborative. Convened by the BOA and the Boston Private Industry Council, Opportunity Youth is a, "group of more than 80 stakeholders who have been working together since 2013 to expand and better connect education and employment pathways available to Boston's opportunity youth or the 7,000 young people in Boston who are 16-24 years old and are not in school or working (Boston Opportunity Agenda Report Card, 2019). The OYC is another example of the Opportunity Agenda creating a network in a space where there was a gap. In this instance, the youth that were no longer connected with formal education and are not yet connected to a career. With roots in the spring of 2013, the collaborative is using their six years of experience collecting data and developing initiatives to ensure that the lessons learned are shaping the systems with which Opportunity Youth interfaces. Essentially, the collaborative focuses on gaining a better understanding of why these youth aren't connected to education or employment by engaging with the youth themselves. Through this understanding, the group aims to align resources and connect the youth to career pathways in a more effective and efficient manner. As will be discussed below, the long term impact of engaging this target group will be shown by the bolster of the number and percentage of people aged 25-64 with post secondary credentials, a key metric of the adult education space on the timeline.

Adult Opportunity Network Now Opportunity Youth, SkillWorks, Lumina Talent Hub

The original initiative of the Adult Opportunity Network focused primarily on transforming the space through a coordination of services that already existed. A prominent player supporting adult learners is The Adult Basic Education (ABE) system, which has focused on English acquisition and basic skills for high school credentialing. As described in 2013, the Opportunity Agenda's Adult Opportunity Network in collaboration with the Massachusetts Department of Elementary and Secondary Education, the Mayor's Office of Jobs and Community Service and World Education, Inc, "aims to dramatically increase the number of Boston adults who are ready for college and career by creating a networked system of adult education providers offering a clear pathway from ABE coursework to postsecondary education that results in a certificate or degree with labor-market value." (Boston Opportunity Agenda Report Card, 2013). Fundamentally, BOA was attempting to refocus adult learning away from basic skills towards post secondary credentialing, that would provide these learners with better access to career pathways and better preparation for success. These network endeavors were curtailed in 2014 and efforts in this space transitioned to the Opportunity Youth (as described in the previous section).

Worth commenting on, fostering the OY Collaborative shows the BOA getting "upstream" on the issue of adult education. As the partnership explained, the target population of the OY is 16-24 year old who are disconnected from school and career. These same individuals, absent an intervention, will likely become part of the community of Boston adults without the necessary education and skills for viable employment. With this shift, the BOA focuses support to Boston residents before they become adults. This support, theoretically, should help bolster the percentages of adults with post secondary degrees, a goal of the adult learning space. Thus, this adjustment in how the Opportunity Agenda tackles adult education and postsecondary attainment demonstrates how the partnership learns and adapts its initiatives accordingly. The work of the Opportunity Youth was in conjunction with other entities, such as the Lumina Foundation and SkillWorks, introduced below.

The Lumina Foundation, an independent, private foundation in Indianapolis that is committed to making opportunities for learning beyond high school available to all, connected to Boston through the positive results with Success Boston beginning in 2014. In 2017, Boston was designated as one of 17 cities as a Talent Hub by Lumina. Talent Hubs are recognized for their ability to substantially increase the percentage of people with degrees, certifications and credentials ("Lumina Foundation Designates", 2017). As such, Boston focuses on developing meta majors so that recent high school graduates, primarily 18- to 22-year olds, shorten their time to college completion and complete at higher rates. This work clearly supports the post-secondary attainment goals (increasing the percentage of adults with college degrees) of the BOA partnership. Lastly, Skillworks, a workforce funder collaborative of national and local philanthropy, focuses on sectors where employees need short-term training and certification to access employment opportunities. As of the latest report card in January 2019, SkillWorks is coordinating with the Boston Private Industry Council to develop career pathways in IT for what they term, “non-traditional” talent as a first step (Boston Opportunity Agenda 8th Report Card, 2019).

Additional Initiatives: High School Redesign and Definition for College and Career Readiness

Two additional initiatives, both in the high school completion space, were pursued by the BOA: High School Redesign and Creating Definitions for College and Career Readiness. These represented new initiatives undertaken after the 2010 partnership launch as opposed to the previous section, which reviewed updates to the initial initiatives. High School Redesign (HSReD) was an initiative supportive of central planning by the Boston Public Schools. Under the leadership of then Superintendent Dr. Tommy Chang and City of Boston’s Chief of Education, Rahn Dorsey, efforts were undertaken to reimagine the Boston Public Schools. The initiative spanned several phases.

First, public engagement via community meetings, social media, and public forums gathered input from a variety of stakeholders on what students should know and suggestions about what schools of the future should offer. From there, four design principles were created to guide the initial work. These guiding principles were: (1) learning must encompass every aspect of the individual— academic, social, emotional, cultural and physical; (2) cognitively demanding work is not enough, we need to engage and stimulate our students on a daily basis; (3) provide personalized experiences that promote passion, creative exploration and diversity of thought; and (4) meaningful connections that extend beyond the classroom help our students build future pathways to success. (Dorsey, R., McCaskill, K. & Wilson, R., 2015). Secondly, the BOA worked with a variety of stakeholders in the educational ecosystem, including the Mayor's Office and BPS, to create both a definition of College and Career Readiness as well as measurements for each criterion. This definition was directly tied to the high school redesign principles created out of the described public conversations. This definition of College and Career Readiness has been adopted by the Boston Public Schools and is central to its work on reinvigorating and reforming high schools to better prepare students for their future (Boston's College, Career & Life Readiness Definition, 2017). This process for defining college and career readiness will be discussed further later in the chapter in the section answering the research question about the influence of the BOA on the Boston Public Schools.

While some of the work of this initiative is explicitly connected to the BOA, other aspects have a less direct connection to the partnership. Certainly Rahn Dorsey, the City of Boston's Chief of Education and a champion of school redesign was very familiar with the Opportunity Agenda through his work at Barr Foundation (BOA member) on the Summer Learning Project. Additionally, foundations such as Nellie Mae and Barr had a vested interest in the redesign at an institutional level as it dovetails with particular foundations focused on system change and student centered learning. Finally, as an Opportunity Agenda member, the Boston Public Schools are sharing this work with their external partners in the agenda.

Updating the Metrics

As a partnership now spanning nine years of existence, the metrics or benchmarks of the Opportunity Agenda have shifted in some instances. These shifts in metrics are indicative of three things: updates to membership, updates to initiatives or realignment of initiatives (or a combination) on the cradle to career timeline of support. In this section, I have separated the high school graduation and college graduation spaces to better reflect the pipeline and the present initiatives of the partnership and the corresponding metrics as shown in table 10.

Table 10
Updated Metrics

Space on Timeline	Initial Initiative	Initial Metrics	Updated Initiative	Updated Metrics
Solid Educational Foundation	Thrive in Five	• Early Literacy (DIBELS) • 3rd Grade Reading Proficiency	Birth to Eight Collaborative	• Early Literacy (DIBELS) • 3rd Grade Reading Proficiency
On Track For High School Graduation	Summer Learning Project	• 8^{th} graders taking Algebra • Students receiving a B or better in 8^{th} grade math	Summer Learning Academies	• 6th Grade Math Proficiency

High School Graduation	Success Boston (Getting Ready + Getting In)	• Passing all MCAS tests in grade 10 • Annual Drop-Out Rate • 4 year high school graduation rate	Success Boston (Getting Ready + Getting In) Opportunity Youth	• Annual Drop-Out Rate • 4 year high school graduation rate • College and Career Readiness Indicators
College Completion	Success Boston (Getting Through)	• BPS grads with associates degree or higher after 6 years	Success Boston (Getting Through + Getting Connected)	• College Enrollment • College Completion
Post Secondary Attainment	Adult Opportunity Network	• % of adult learners entering higher ed institutions	Success Boston Opportunity Youth SkillWorks Lumina Talent Hub	• % of adults (aged 25-64) with post-secondary credentials

Note. Data in this table has been adapted from Annual Report Cards 2011, 2019

Initial Analysis of Metric Updates

Metrics or benchmarks are a key component of the annual report card that the BOA publishes as they demonstrate the adherence to the partnership's guiding principle of using data for accountability and calls to action. These benchmarks inform the partnership and the public as to the level of progress that is being made regarding the improvement of Boston's children at various points of their education. Connected to the agenda's initiatives, they are an evaluation tool for the BOA and inform the group where their efforts are most and least effective.

As a whole, the benchmarks have remained largely steady. There have been some changes as shown in the table above. First is the adjustment to the math indicator in middle school (Number of 8^{th} graders taking Algebra, and students receiving a B or better in 8^{th} grade math now measured by percent of students demonstrating proficiency in 6th grade math). The shift of metric is reflective of various influences. The change, described in the 2017 annual report card, is due to this indicator being a part of the Massachusetts Department of Elementary and Secondary Education's College and Career Readiness Early Warning Indicator System; it is a leading indicator for high school and college success, and it is a metric to which all three education systems (Public, Charter, and Catholic) are paying attention. Other assessments, which inform the Opportunity Agenda's benchmarks, also have shifted over the years as MCAS tests are replaced by PARCC tests and then Next Generation MCAS tests take the place of those tests, for example. The other shifts in metrics are subtle and are indicative of more closely aligning with the initiatives that have shifted as described in the previous section.

More significant than the benchmark itself has been the expansion of the data to include the Boston Charter and Catholic Schools. As shown in the charts previously, their inclusion represents an additional 14,000 students and approximately 19% of Boston school aged children to the over 54,000 BPS students (approx. 73% of Boston children) and thus the Opportunity Agenda's data is more representative of the city's child population as a whole.

There are some exceptions to these common measurements as noted by the partnership. One example is demonstrated in the "Early Education Foundation Initiative". The Boston Public Schools uses the DIBELS NEXT assessment in kindergarten to determine readiness to learn for all of its students. The charter schools and catholic schools also assess readiness but not in a uniform way. Schools utilize a variety of early literacy instruments, including DIBELS NEXT, the Bracken School Readiness Assessment and the Strategic Evaluation of Progress (STEP). Another example is high school completion rates. As of 2019, not all charter schools have been in existence long enough to have 4 year cohorts to measure graduation. Thus, those schools are not included in the data for charter schools as compared to BPS and the Catholic Schools. As the BOA report card of 2019 remarks, steps are being taken by the Catholic Schools particularly to fill some of these holes in data and the anticipation is that it will become more complete as the years pass.

Summary of Finding One

The previous sections have described how the BOA has changed from its public launch in 2010 until 2019. Specific attention was given to the updates to the membership, initiatives, and metrics as they are indicative of who the partnership is, their work and their priorities, and their measurement of progress. Two particular findings of this research question are indicative of a strong partnership. First, the retention of the partner membership has been remarkable at nearly 100%. This demonstrates high satisfaction from its partners.

As discussed, this consistency laid the foundation for relationships to grow, trust to be built and growth to be achieved. Second, due to its complexity and longevity, one would expect that the partnership would change. Its ability to adapt to changing circumstances demonstrates learning and a willingness to improve. In chapter six, I explain the characteristics of this partnership which foster the conditions for membership consistency and partnership adaptability.

In the following chapter, I share the findings related to the three additional research questions. Specifically, I report the partner motivations to join, the partner perceptions of success and challenges, and the influence of the BOA on the Boston Public Schools.

CHAPTER 5

FINDING TWO-FOUR: BOA PARTNER MOTIVATIONS, PERCEPTIONS AND INFLUENCE

Introduction

In the previous chapter, the development of the BOA partnership was described. Divided into two sections, the research findings revealed how the partnership was formed from 2007-2010 when the BOA was formally announced followed by an account of the partnership updates as it developed from 2010-2019. An initial analysis was provided. In this chapter, the findings for the three remaining research questions (motivations for partnership, perceptions of success and challenge, and partnership influence on BPS) is presented along with initial analysis. The chapter concludes with a summary of the key findings from all four research questions reported both in chapter four and five.

Finding Two: Motivations For Partnership

Introduction to Finding Two

The BOA partnership initially centered around a dozen participating organizations during its early years of existence. These original partners represented both the public and private sectors of the Boston area. The public sector was represented by the City of Boston (a representative from the Mayor's Office) and the Boston Public Schools. The private sector was constituted by the various non-profit organizations and foundations: Barr Foundation, Boston Foundation, Catholic Charities, Combined Jewish Philanthropies, Eos Foundation[21], Kraft Family Foundation, Nellie Mae Foundation, New Profit Inc, and the United Way of Massachusetts Bay and Merrimack Valley as well as The Related Beal Companies, Inc[22]. These organizations joined at various points during the planning process of its inception (2007-2010).

It is noted here that other partners subsequently joined the partnership after the official launch. Additional public organizations that officially were listed as core partners were Umass-Boston (2015) and the Boston Charter School Alliance (2018) while the partnership welcomed the additions of the Angell Foundation (2018), the Archdiocese of Boston Catholic Schools (2018), the Smith Family Foundation (2021), and the Boston Children's Hospital (2021) from the private sector. These updates to the core partner membership were discussed further in the findings of the research question (How has the partnership developed from 2007-2019?) in chapter four. With the exception of two foundations[23], all core partners that have joined at any point of the BOA existence have remained in the partnership as of this writing.

In this section, I use a spectrum of motivations for partnership (Barringer & Harrison, 2000; Cantor, 1990; Siegel, 2010) to analyze why member organizations joined the BOA partnership. For each theory of motivation, I briefly review the supposition and provide an

---

[21] Eos Foundation would leave partnership in 2013

[22] A private "for-profit" business

[23] As noted earlier, the EOS Foundation left in 2013 and the Lynch Foundation was a partner member for the year of 2015 before exiting.

explanation of how the partner that joined the BOA demonstrated that theory. I conclude this section with a summary of the findings.

Partner Motivations for Joining the BOA

Organizations enter partnerships for a variety of reasons. These motivations can have an impact on their participation. These impacts include the manner in which the partner chooses to partner, the level of engagement and their desired outcomes to name a few. In this section, I utilized a spectrum of eight motivational theories for partnership (Barringer & Harrison, 2000; Cantor, 1990; Siegel, 2010) to analyze the motivations of organizations to partner with the BOA. I first briefly describe the theory and then discuss how the particular organization in the BOA demonstrates this theory. In most instances, partners revealed multiple motivations to join the partnership. It is noted that in these descriptions, the importance of each particular motivation was not compared towards others. For example, if a foundation appears to be motivated to join by both domain focus and institutional theory, this does not suggest that they are equally motivated by both (50%-50%). My explanation doesn't weigh the relevance of these theories when the evidence demonstrates more than one. Finally, these theories explain the motivation of the partner at the time of the interview and it can be expected that these motivations shift over the course of the partnership.

Transaction Cost Economics

Transaction Cost Economics is a theory that describes the stimulus for partnership predicated on increased efficiency for the partners involved. In the BOA, this motivation existed at two levels. First, it existed at the CEO level particularly as part of the original ideation and creation of the Opportunity Agenda. The major philanthropies, Boston Foundation, Barr Foundation, Catholic Charities, and the United Way, among others, were supporting some of the same educational initiatives around the city and thus creating an overlap of resources. The repetitious funding may have resulted in some educational programs/non-profits/initiatives receiving an excess of funding while other programs/non-profits/initiatives were underfunded or not funded at all. Additionally, absent the communication and collaboration between funders within this partnership, different spaces of the cradle to career educational pipeline might have received disproportionately more funding than others. For example, the major funding philanthropies may all allocate funds for early education which results in the kindergarten to high school aged space lacking resources.

This is important because the imbalance described in this example has two detrimental effects. First, the K-grade 12 space lacks support and so logic says that it is likely to be negatively impacted. The other effect is that the educational gains achieved in the early education space due to foundational support may be reduced or eradicated as the next phase of a child's education is not supported and therefore lacks quality. This example illustrates the logic of the pipeline creation concept of BOA. The belief of the Opportunity Agenda partners was that greater impact could be brought to bear if the financial support by these funders was discussed and strategized in terms of effective allocation. This would ensure that the educational pipeline would be more evenly and adequately funded. Additionally, the process for funding achieved greater efficiency as potential funding recipients could "pitch" to a group of funders in one location rather than making the rounds to each funding organization separately.

Secondly, the theory is pertinent with the identification of community organizations in the city with whom to partner. That is to say, the community partner or provider level within the partnership which provides the programming and services for the BOA initiatives. A specific example of transaction cost economic theory was demonstrated by the Summer Learning Project (SLP) regarding site selection as well as evaluation. Regarding site selection, both BPS partner schools, initially schools designated as “turn around”, and the community based organizations were identified and paired with geography in mind. These pairings, who often had a previous history of partnership, fostered improved communication and collaboration through reduced travel time and costs. Finally, evaluation costs for sites were reduced due to the bundling of organizations by Boston After School and Beyond as they contracted the evaluation piece for the various provider sites at a considerable reduction in costs.

Resource Dependency

As discussed in chapter two, resource dependency describes organizations motivated by the need to gain critical resources that they are missing. Within the Opportunity Agenda exists a relationship between the core partner level, including primary agenda funders as well as other key institutions, and the community partners. Oftentimes, there are intermediate entities operating at a level between the core partner leadership and the providers. Examples of these are Boston After School and Beyond and the Private Industry Council. These mediaries also are dependent on the core partners of the BOA for resources.

The core partners collectively develop the vision and initiatives for the cradle-to-career network for Boston youth and engage with intermediaries and community providers who can implement the necessary programming to achieve the vision. The intermediaries and providers are attracted to partner with the Opportunity Agenda in areas that align with their efforts due to the fact that the alliance can result in a grant of funds. These private funds are often a lifeline for these non-profits and thus a relationship motivated by resource dependency is primary. As Chris Smith of the BASB noted, “We live off private money” (C. Smith, personal communication, March 2015). Additionally, a forged partnership with BOA may open up opportunities to be part of larger grants with which the greater network is involved. For example, BASB’s Summer Learning Project received funding from the Wallace Foundation. As a participant in summer learning (a BOA initiative), Thompson Island received in-kind services in the form of program evaluation from Wallace. Finally, the access to other influential parties within the city that can elevate a community organization’s prominence is a resource on which the community partner may become dependent. No matter how important and effective work that a community organization provides, viability can be based on visibility and the membership and relationships formed brings the spotlight.

This relationship is not a one way street as the intermediaries and community providers possess resources that the core partners lack. The providers possess the resources (human and facilities) in the form of instructors, suitable educational spaces and equipment/technology and capacity (intellectual and programmatic) such as individual expertise and knowledge, and evaluation metric tools, among others that these core partners (primarily foundations) don't have to implement their agenda or vision. However, the resource dependency is not as strong for the funders as there is an imbalance between the number of non-profit community organizations capable of providing the programming (typically multiple) and the number of funders (typically more scarce). Thus, the dependency for funders is not site-specific. For instance, within the structure of the BOA, there are 16 core partner organizations though not all provide funding or may not provide funding for a particular programming initiative due to a variety of constraints. Listed under partner organizations for the BOA for their various initiatives are over one hundred community partners (See Table A4 in Appendix). While being a community partner doesn't necessarily denote a reception of funding, the ratio of the partner types in the Opportunity Agenda shows the imbalance of this relationship (though it should be noted that community partners are motivated by other than resource dependency).

Resource dependency theory may also explain one of the reasons for the City of Boston and Boston Public Schools to partner (other motivations of stakeholder theory and strategic choice will be discussed in subsequent sections). While the partners in the BOA provide strategic investment in the Boston Public Schools, the total dollars given if compared to the total annual operating budget of the Boston Public Schools is not that great. While difficult to give a clear estimate, even if the BOA giving was close to $30 million (they announced $27 million when BOA launched), BPS is a nearly $1.3 billion annual enterprise[24], which represents less than 3%. A significant figure but it's real value may lie in

[24] https://www.bostonpublicschools.org/cms/lib/MA01906464/Centricity/domain/184/budgetvisualization/index.html#/

the fact that these grants can be categorized as discretionary money for the district. In fact most of the over $1 billion annual BPS budget is tied up in the teacher contract, facilities, transportation and other obligations. Thus, external funding has real relevance even if the dollar amounts are small in the larger scheme of things. For the district, it's not the amount that an external partner like the Boston Opportunity may contribute but the potential freedom and flexibility attached to those dollars. I conclude by noting that the external partner dollars are not without constrictions. Foundations and other philanthropic entities have responsibilities to their own boards in terms of areas which they support and processes in terms of grantmaking that need to be adhered to.

Strategic Choice

This broad theory describes a range of motivations to partner that would be "helpful" to the organization. It differs from resource dependency as it centers around opportunism rather than deficiency, from lack of resources. This theory was expressed as motivation repeatedly by the partners. One articulation is that the BOA is a partnership that allows partner organizations to exert their influence in an area of pipeline they care about or have a background or expertise in or to increase their influence. Debbie Rambo of Catholic Charities remarked, "We (Catholic Charities) have early childhood education, we have adult education, and we do have a fair amount of support around after school programming. From a provider point of view, the Opportunity Agenda was addressing a pipeline that we understood and cared about. For clients that we understood and cared about" (D. Rambo, personal communication, May 2016). Thus, there is a strategic benefit for Catholic Charities' participation in the BOA. For example, by being a participant in the Opportunity Agenda, Catholic Charities can exert their influence as the partnership develops and refines its initiatives in aspects of the pipeline in which Catholic Charities supports. It also affords CC to speak on behalf of the community partners with whom they already engaged and who would be the providers delivering the services which the Opportunity Agenda funds.

Strategic choice also encompasses an individual partner organization's desire to elevate the degree of their own influence through the power of alliance. The Nellie Mae Foundation has a focus on broad support for the whole region of New England. As Boston is the area's largest city, Nellie Mae could increase their influence in the city through membership in the Opportunity Agenda - "...it [participation in the OA] met a need of ours to figure out a way to gain some leverage in Boston. It's the biggest city in New England. It was a good idea to put our heads together with other funders; it seemed like a worthwhile thing to get into". Donahue also recognized the potential power of the partnership for Nellie Mae. He remarked, "there's an assumption that you can't just provide your own little grants to the Boston public schools, and that (systems change) is going to happen. You need to have other folks that are influencing the system problematically or directionally need to be part of the conversation or your efforts get thwarted by the bigger momentum of everybody else" (N. Donohue, personal communication, July 2015).

Finally, some organizations come to the partnership as the agenda's work has a direct impact on their institution. As examples, BASB and the Summer Learning Project impact Boston Public School students which of course impacts BPS as a whole. Later in the pipeline, many of these BPS students attend UMass-Boston so there is a connection in this regard. Furthermore, Success Boston, a key partnership of another Opportunity Agenda initiative (college completion) also directly impacts Umass Boston, in addition to other city universities and colleges. Michael Middleton (Umass Boston designee) described this phenomena, "I think the other piece of it [Umass-Boston] is as the public research institution in the city, we wear that particular mantel that we want to be involved in the ground game in public initiatives in public schools. The kids that come from Boston public schools come to UMass Boston" (M. Middleton, personal communication, May 2016). Through membership, UMB can exert influence within the Opportunity Agenda at the various initiatives and be the beneficiary of the partnership's labor further down the line when the students matriculate. Additionally, all of the Opportunity Agenda work impacts the City of Boston. Politically, the performance of the Boston Public Schools is a reflection on the city and the city's leadership. Thus, there is a natural motivation to participate in this public-private partnership as strong schools yield political capital for the mayor's office. Convexly, if the City of Boston chose not to participate, this action might be construed as a lack of support for education in Boston. Typically, this is not a message that elected officials want to send. Lastly, in a broad sense the partnership's efforts to improve the educational attainment of Boston's citizenship can impact the economic, civic, and social capacity of the city, all of which are of interest to city leaders.

Stakeholder Theory

This theory frames motivation to partnership as organizations with mutual goals. In some regards, this theory encompasses all the members (private and public) in the BOA partnership as improving education is the umbrella under which all of the partners involved have a stake. While each organization might not exclusively support education, it is a part of their mission. This shared issue was embraced from the onset of the partnership formation as it was an issue about which the initial planners were passionate.

However, having a central issue to agree on (improving education in Boston or education reform) and achieving alignment on how best to achieve this goal are distinct matters. The consensus on the central issue of education is clear. Less clear was an alignment on how best to achieve the goals. As individual institutions, the partners have a variety of interests and degrees of interest within the educational pipeline. These interest areas identified the chairing CEO and organization for each initiative area (as shown in Table 5). These areas of interest may suggest an opinion that one particular age period in a child's education is more important and thus more worthy of funding. Furthermore, there are various philosophies on how improvement in education is achieved particularly in the K-12 space (which is the public school space). While organizations all wanted to improve the educational systems in Boston, Steve Greeley (DCA Consultants) remembered, different ideas were espoused by various partners CEOs. He recalled,

> They had different areas of emphasis, on what they most want to do, and so, for example, Pat Brandes at the Barr Foundation really felt that the critical thing to do was to enhance the capacity of the school system itself, so do things that would strengthen its capacity to continually improve, and Nick Donohue from Nellie Mae, who came into this partnership shortly after we came on board, and felt it's really

> important to push the existing systems. To find out what innovations work, and really push hard to have those innovations brought into the mix. I'd say Paul Grogan felt, 'we've got to create very clear plans, and those plans have to be oriented towards specific results, and we've got to then relentlessly pursue them and refine our work as we go forward". (S. Greeley, personal communication, June 2015)

These varied perspectives were not reconciled during the development phase of the partnership. Donohue reportedly pushed for the group to come to consensus on the group's role but Greeley felt that the lack of real familiarity between the CEOs coupled with each individual's CEOs need to report back to their institution was a reason to operate with a more delicate touch and not force the group to reconcile. He hoped that time would allow the individuals involved to see that each area of emphasis could be integrated. It is unclear whether this reconciliation of perspectives on systems change was achieved. Further discussion of this lack of agreement on how to best affect change will be discussed in chapter six.

The research on stakeholder theory also notes that while there may be common goals among partnering organizations, it doesn't mean that there are common cultures for the participants and that partnering organizations may have various degrees of power within the partnership. The BOA appears to have core partner organizations with higher and lower degrees of involvement and stature. Do these degrees of involvement and stature equate to increased power within the partnership? Logic would say that they do.

For example, there is ample evidence to suggest that the Boston Foundation is the organization major convenor of this partnership. First, their involvement includes providing office space for the Executive Director, Kristin McSwain. Secondly, Boston Foundation is the partner organization that pays the position's salary, though the salary is a shared cost that is distributed to other foundations in the partnership (IRS, Boston Foundation Tax Return 990, 2017). For this salary, and for other Boston Opportunity initiatives, some partnering foundations make grants to the Boston Foundation with the BOA explicitly described as the purpose. For example, the Nellie Mae Foundation, $100,000, (IRS, Nellie Mae Foundation Tax Return, 2017) and the Barr Foundation, $75,000, made sizable contributions in 2017 (IRS, Barr Foundation Tax Return 990, 2017). Other foundations also make grants to the Boston Foundation, including the United Way and Combined Jewish Philanthropies, without the explicit designation of the BOA so it's possible the funding could be in support of other Boston Foundation initiatives, though it may just be a product of their accounting procedures. In addition, a review of the BOA report cards shows the institution providing support to all initiative areas on the pipeline. Moreover, the Boston Foundation provides the administrative and web support to the partnership website. Finally, the Boston Foundation is a convener of Success Boston, a major partnership agenda. As the city's community foundation, civic responsibility may dictate and explain this substantial investment.

Furthermore, the Boston Foundation may achieve additional sway within the partnership due to the size of its grant giving. While not necessarily a part of the BOA activities, the Boston Foundation uses these assets to grant money to many of the other BOA partner organizations including CJP, New Profit, United Way, Catholic Charities, and Umass Boston to totals in surplus of $4 million in 2017 (IRS, Boston Foundation Tax Return Form 990, 2017). To be clear, the other foundations in the partnership also grant money to the Boston Foundation, though their contributions are not at the same contribution level in terms of dollars.

Organizational Learning

Organizational learning theory's tenet is that organizations partner in order to increase their knowledge. Logically, this increase in knowledge benefits the individual organization. Upon examination of the BOA, partners reported considerable amounts of time and money having been invested in research from external sources such as the Strive Network to inform the partnership's creation and decision making, on topics such as partnership practices in other cities; effective benchmarks for educational development; and other current educational practices and theories. However, there appears to be a lack of intentional learning from within the partnership itself. In my research, this theory was only alluded to by one partner, Nellie Mae's CEO, Nick Donohue as he felt there was benefit to "putting our heads together with other funders" (N. Donohue, personal communication, July 2015).

That isn't to say that learning within the partnership isn't present. For example, at the BOA leadership level (core partners), monthly meetings attended by the CEO and other key staff may have fostered a fruitful environment for learning from each other. Simply through an increased familiarity with the leadership as the result of regular and sustained contact, the CEOs would learn about other partner organization's mission, operations, and culture. In doing so, the partners might have reflected on their own practices. These exchanges would proffer opportunities for self-improvement (better ways of doing things) and awareness (community needs and philanthropic trends). Through this process, a level of trust has likely been developed, which would only aid in learning opportunity potential. It's noteworthy that the majority of the central partners have remained throughout the now 11 years of partnership (Boston Foundation, Barr Foundation, United Way, Catholic Charities, Combined Jewish Philanthropies, City of Boston, Boston Public Schools, The Beal Companies, Nellie Mae, Kraft Family Foundation, and New Profit).

Additionally, there is demonstrated learning at the community partner level within a particular initiative. For example, all community partners involved in the Summer Learning Project (SLP supports the high school completion initiative) collectively meet multiple times a year to both discuss results of a particular summer programming cycle and learn best practices but also to strategize about how to utilize these findings for the following year's programming cycle. While the partnership shows evidence of learning, generally that wasn't the impetus for organizations to join the partnership.

While these examples above are encouraging, there are instances where there are opportunities for learning that are missed. The silo nature of the four main initiatives of the Opportunity Agenda may explain the largely absent learning theory. Structurally, outside of the CEO level's regular meeting, this partnership's design does not foster learning between initiatives. As discussed above, community partners within an initiative have opportunities to meet. However, there is no formal mechanism for community partners from different initiatives to learn from each other. Melissa Partridge of Boston Public Schools described the independence of each initiative, “You stayed basically in your lane, except the Opportunity Agenda would have their report card event where they would report out on each of their initiatives and you would mix and mingle with people there” (M. Partridge, personal communication, April 2015). So, early education community partners aren’t learning from high school completion partners. High school completion partners don’t learn from the adult education community partners.

This absence at levels outside of the CEO circle limits the overall organizational learning as best practices aren’t typically shared across initiative formally. Some of this is remediated by structures that foster informal learning. The overlapping of staff on multiple initiatives and the relative size of the Boston education world led to multiple opportunities of informal learning. For example, Partridge also noted that, “Boston is so small. All the same people work on all the same stuff...Elizabeth Pauley who sat on Summer Learning Project Planning is leading Success Boston effectively” (M. Partridge, personal communication, April 2015). Ultimately, increased organizational learning could be achieved with more intentionality.

Lastly, unmentioned in the research for this project has been the extent to which each partner institution has learned about the development and evolution of public-private partnerships. In essence, how prevalent, if at all, have the institutions engaged in learning about the process in which they are a participant. This knowledge can help the Opportunity Agenda to improve itself as a partnership and this type of learning would help to sustain interest over the long haul.

Institutional Theory

Institutional theory postulates that organizations choose to partner because partnership brings recognition and legitimacy to the organization through this association. This motivation seems to exist at a variety of instances within the BOA. In terms of legitimacy, the inclusion of the Boston Public Schools is very important to the partnership. As a partnership supporting education within Boston, it would be difficult to completely engage in this work without the participation of the district. From Melissa Partridge's, the BPS representative for Summer Learning, perspective, "I think in the beginning (of the partnership) the district is kind of a jewel that helps partners secure funding, because that's where the schools are, right?" (M. Partridge, personal communication, April 2015). In addition, other core partners of the Opportunity Agenda recognize the importance of district involvement for attracting other institutions to the partnership. Elizabeth Pauley of the Boston Foundation remembers, "I don't recall it being a hard sell for anybody because I think people look at the table and they're like, '"Wow, this is a table I want to be at."' Particularly once the superintendent came because then we have this direct line into the schools" (E. Pauley, personal communication, March 2015). So logically, if BPS were to drop out, then the partnership would lose legitimacy. Absent the BOA adopting an "overthrow the school system" stance, it behooves them to have BPS as a partner. Interestingly, in 2015, the Opportunity Agenda began to include parochial and charter school performance data as part of their self-evaluative annual report cards. However, it would be three years later (2018) before the BOA formally added the Archdiocese of Boston and Boston Charter Public Schools to the partnership. The inclusion of these systems as partners legitimizes the relationship and the subsequent data. These additions honor the fact that the Opportunity Agenda's mission is to support all Boston youth and that there are students attending all three of these school types.

Institutional theory also explains community partner motivations. While financial support from the major funders in the city is important, the connection to these prominent institutions has other benefits for community partners particularly as successes have been garnered by BOA. Participation for community partners was galvanizing for their own organization. As Arthur Pearson of Thompson Island described,

> We're one little non-profit trying, sincerely, to make a contribution, given that we've got this island, we have this legacy of educational service to Boston youth. We have this Outward Bound technology and all of the accoutrements that go with it. How can we help? This answered the question in an incredibly compelling way, where I could stand up in front of my board and say, "Here's what we're doing, we're launching a program that we're being asked by the Mayor and the Governor and the President to launch this program, to do this transformational intervention in children working in one of the most challenging schools in the State. A call to duty, so off we go, mount up ladies and gentlemen. (A. Pearson, personal communication, April 2015)

With success from the Summer Learning Project, capacity to serve larger numbers of students resulted. BASB found willing community partners to provide the services. BASB's David McAuley remarked, "I think people [leaders of community partners] see the value [of the Summer Learning Project] and they know we won that NSLA award, the National Summer Learning Association Award in 2013" (D. McAuley, personal communication, June 2015). For the community partner joining the fold, there was the by-product of national exposure through the Wallace Foundation grants as well as to local funders and powerful philanthropic figures in town.

Domain Focus

Domain Focus theory evolved from the recognition that individual organizations are simply unable to solve societal "meta-problems" on their own. An example often offered is poverty. There is evidence of this motivation in the construct and operation of the BOA in the early years. The Boston Foundation and Paul Grogan (CEO) had been a driver of the Opportunity Agenda particularly in the early years but Elizabeth Pauley (Boston Foundation) noted about capacity constraints, "...when it started to get really real, like we're going to launch it, it couldn't just be the Boston Foundation saying what we wanted to see done because I did actually have another job" (E. Pauley, personal communication, March 2015). This illustrates a recognition about logistic and capacity limitations for an individual institution. For example, education and the Opportunity Agenda is just one initiative and interest area of many for the Boston Foundation.

Nick Donohue also recognized the larger scope of the issue from a funding perspective and the limitations of any one organization's grant. As he stated"....we have these big ideas about deeper systems change, so there's an assumption that you can't just provide your own little grants to the Boston Public Schools, and that's going to happen. You need to have other folks that are influencing the system problematically or directionally need to be part of the conversation or your efforts get thwarted by the bigger momentum of everybody else" (N. Donohue, personal communication, July 2015).

This evidence notwithstanding, this theory seems under represented. Urban educational reform can be classified as a meta-problem not capably tackled by any single organization, not even the public school district itself in many cases. The partners that did reference this motivation as a need for partnership cited capacity and impact issues of a solitary reformer in the education space and thus the need to find other education reformers. Though, the theory suggests that a full recognition of education reform as a meta issue would spur the need for partners in other support areas such as housing, health, anti-violence, etc. The relative absence in evidence of this theory either indicates a lack of recognition of the education reform in Boston as a meta-problem or hubris by the partner organizations that they themselves could create true reform if they were more efficient or strategic. The lack of evidence of domain focus theory helps explain why other community members from other sectors have not been included such as the business community, housing, mental health, nutrition, police or anti-violence organizations, etc.[25] whose inclusion would offer a more "wrap-around" approach to the Opportunity Agenda. This wrap-around approach has been

[25] Boston Children's Hospital joined BOA as a core partner in 2021

championed by Geoffrey Canada and his Harlem Children's Zone[26] and many supporters as a necessity for true and comprehensive urban education reform.

Mandate

Mandate, while not exactly a theory, also explains why organizations join partnerships. As mentioned earlier, Boston has experience with this type of motivation for partnership during the busing era of the 1970s and forced integration of schools. In this time period, Judge Garritty mandated that certain schools and organizations partner together to support the desegregation process of the United States (Waddock & Post, 1991). However, the BOA partners aren't demonstrating this theory and are joining for reasons other than mandate as discussed above.

Summary Of Finding Two

With the use of the array of motivational theories, I explained why the partners joined the BOA. As described above, partners understandably had multiple motivation to join this partnership due to its complexity. In these instances, this research does not attempt to determine the weight of each motivation in comparison to the others.

In summarizing the findings, there are some differences between the type of partner (public or private, foundation or provider, etc) that are noteworthy. In the BOA, the philanthropic organizations were primarily motivated to partner by transaction cost economics and strategic choice particularly at the onset. The Boston Foundation, The Barr Foundation, Catholic Charities and Combined Jewish Philanthropies recognized the

[26] For more information on the Harlem Children's Zone (https://hcz.org/)

inefficiency created by their siloed support around initiatives around the city. They felt a coordinated effort would more effectively impact their areas of support. Transaction cost economics and strategic choice explained why they came to the table to partner in the first place. Once at the table and discussing the potential partnership, stakeholder theory reinforced the desire to partner together. While the foundations individually support an array of program areas, the group coalesced around a common area in which they all had an interest: education. The umbrella of education tied into each partner's mission and created a foundation for mutual goal creation. Additional partners to the BOA, such as the Nellie Mae Foundation, New Profit and others from the philanthropic world would share these same motivations. Frankly, as the partnership is presently constructed, it is hard to imagine an organization joining without education being at least tangential to its mission.

Additionally, the desire of the philanthropies to enter explicit partnership with the Boston Public Schools and the ability to do so with its inclusion in the Opportunity Agenda is clear demonstration of institutional theory. While these foundations and charities were well established and legitimate prior to joining the partnership, the alliance only heightened their visibility and image. It also could be conspicuous if a local philanthropy supporting education chose not to join if asked.

The philanthropic partners also recognized Boston education reform as a meta-problem beyond their ability and scope of their singular efforts which is explained by the domain focus theory, though their concerns stem from lack of capacity rather than an issue broader necessitating a more broadly distributed source of support beyond just education. As

Siegel (2010) describes, the meta problem becomes a “magnet that draws” partners together (p. 42). Finally, as noted above, strategic choice illustrated a number of reasons for joining the BOA, which allowed the partner to share their ideas and enhance the work of their own institution.

The Boston Public Schools and by extension the City of Boston (the mayor’s office) derive motivation somewhat differently than the philanthropic partners. Resource dependency explains the desire to join the partnership. As partners of the BOA, the Boston Schools increased access to additional funding, coordination and planning, staffing, among other resources that the district was lacking. These additional resources ultimately support the students they serve and improve the quality of the education that the schools provide. For example, absent as a partner in the BOA, summer learning opportunities would look much different, and more deficient to the current status. A second theory, strategic choice, explains BPS willingness to partner in the BOA. Like the philanthropic organizations, the partnership allows BPS to share their agenda more broadly and improve the quality of their services.

Intermediaries such as Boston After School and Beyond (BASB) and the Boston Private Industry Council (PIC) share a motivation with community partners to join the Opportunity Agenda due to resource dependency. As many core partners are funders, the access to grantmaking and the need for financial support for these partners is paramount. Additional resources including, but not limited to, human resources, expertise, transportation, and evaluation tools, are also crucial for providing program services. Additionally, stakeholder theory describes their membership in the partnership as the mission’s of the community partners aligns with the goals of the Opportunity Agenda. The determination of the goals by the core partners and leadership board of the partnership and the absence of the community partners in these decision making circles illustrates the power dynamics acknowledged with this theory. Simply because partners share a common goal doesn't signify that they have equal power.

It should be noted that these interpretations are based on the data collected through interviews conducted in 2015-2016. These motivations for partnership may have shifted over the years as partners live the experience of the partnership. Some motivations may have increased in importance and others may have become less relevant.

Finding Three: Partners' Perceptions of Strengths and Challenges

Introduction to Finding Three

These findings represent a selection of both perceived strengths and challenges shared from personal interviews with partners as well as commentary from published partnership reports. Due to the complexity of the partnership, it is likely that there were additional strengths and challenges not captured in this section particularly in the years past 2015-2016, when the interviews were conducted. During the interview process, subjects were encouraged to think of partnership strengths and challenges in terms *other* than performance on the established BOA metrics. While the benchmarks are a valid method of measurement, and thoroughly presented in the annual reports cards, this research question attempted to uncover the partner perceptions of strengths and challenges in terms of the process of and membership in the partnership. Below, strengths shared centered on initiative accomplishments, visibility, and development; and human capital qualities such as dedication, appropriate staffing and trust while challenges clustered around funding, priorities and sustainment.

Strengths

The partners involved in the BOA perceived strengths of the partnership during the interviews conducted during this research. These responses reflect their perceptions during the time period that the interviews were conducted in the years 2015 and 2016 as well as the data from the partnership's annual report card. During that point, the BOA was at the completion of its first five years of formal existence and these interviews were completed in the months leading up to and just after the public release of the fifth annual report card (January 2016).

The responses were characterized by two types of responses. The first were perceptions of strength based on the Opportunity Agenda initiatives both in terms of effectiveness and increased visibility of the issue. In spite of the framing of the question to elicit responses beyond initiative benchmarks, some of these perceptions were grounded in quantitative data from the annual report cards and reflected areas of progress. Initiatives such Thrive in Five, Summer Learning, Opportunity Youth and Success Boston were specifically highlighted.

Initiatives

While this research's intent is not to evaluate the BOA partnership on its metrics, I use some of the report card data from the Summer Learning Project (now Summer Learning Academies) and Success Boston, as these were most commonly mentioned by interview subjects, to show that these partner perceptions of strengths meet reality. The Summer Learning Project showed growth on several metrics. Specifically, since its inception in the summer of 2010 to projected summer 2019 figures, the initiative expanded from serving 232 students from five schools attending five sites in 2010 to over 14,000 students at 160 sites in 2019 (Boston After School and Beyond, 2019). The work of the Summer Learning Project has morphed into what Boston terms its "5th Quarter of Learning", designed to remediate summer learning loss. As Boston Mayor Martin Walsh declared in 2019, "We are proud that our citywide summer learning partnership serves as a positive example of what the summer months can do for our young people and their ongoing education. Boston has prioritized helping all students have access to fun and meaningful enrichment activities every summer" (Summer for All, 2019).

This proclamation and the belief in the program is demonstrated through additional funding from the Boston Public Schools, which in 2019 represented a $3.2 million investment (Summer for All, 2019). While Melissa Partridge described a more tenuous commitment of financial support for the district during the early years of summer learning (discussed in more detail in the "challenges" section that follows), the partnership seems to be on more solid footing now as the years have progressed. This suggests an institutionalization of the initiative by the city and district and may shield it from any churn in the superintendent position (Boston has had five superintendents during the BOA's existence) which can bring pause to initiatives as the external partners assimilate the new leader.

Success Boston was an additional area of impact that partners felt was a strength. While Success Boston had already formed prior to the Opportunity Agenda, the members perceived that the BOA catalyzed support for its progress. The data suggests the same. One of Success Boston's primary interventions is to provide students with coaching with the college process to help them "get ready, get in, get through, and get connected." Launched in 2008 as a response to a longitudinal study by Northeastern University's Center for Labor Market Studies, which showed that only 35% of Boston Public School students had earned a degree within 6 years, Success Boston now boasts a nearly 52% 6-year graduation rate for BPS students (Class of 2011)[27]. Additionally, Success Boston's data shows a 21% increase in students receiving coaching services persisting in college in their 2nd year as compared to those without services and over 6,000 students served by the partnership (About, n.d. Success Boston)

In addition to the benchmarks and statistics of the initiatives, successful impact was felt through increased visibility of these initiatives. Multiple partners felt that the BOA helped spotlight not only the issue but the strong work of Success Boston and Summer

[27] Full report from the study: Getting to the Finish Line https://www.bostonpic.org/assets/resources/Research_Postsecondary_Getting-Closer-to-the-Finish-Line-Longitudinal-Study.pdf

Learning and brought attention to areas of need such as high school redesign. Chris Smith, Boston After School and Beyond (BASB) Executive Director, described the BOA as a "bully pulpit in a way, with the aspirations to have one citywide agenda, putting it (the initiatives) into the context of an education pipeline. I think that helps everyone elevate their game. It is more eyeballs on the work" (C. Smith, personal communication, March 2015). Essentially, the BOA's ability to bring visibility of educational issues to the Boston community, the work of the partners and with this focus a pressure to sustain high quality work on the issue is a strength.

Developing Initiatives in Working Groups

The path to the establishment of these successful initiatives was varied. Here, I describe the two central strategies for developing the four initiatives, to clarify the roots of their success. The BOA, fairly early in the process, focused on four spaces on the educational pipeline. These original spaces identified as critical periods for educational development were: a solid educational foundation, on track for high school graduation, high school and college completion, and post secondary attainment. With these spaces determined, each working group was tasked to develop a high leverage initiative to enhance the work in that space. The experience for partners working on developing these initiatives varied depending on the degree to which initiatives in these spaces pre-existed the Opportunity Agenda. Ultimately the initiatives developed were: Thrive in Five (a solid educational foundation), the Summer Learning Project (on track for high school graduation), Success Boston (high school and college completion), and The Adult Opportunity Network (post secondary attainment). The different processes for developing these initiatives is described below.

The first strategy used to develop initiatives was co-optation. The working groups for both the "solid educational foundation" and "high school and college completion" surveyed the landscape in those areas and determined that strong partnerships were established in these areas. Specifically, the Thrive in Five partnership, convened by the City of Boston and the United Way, had brought coherence to the early education space and Success Boston, convened by the Boston Foundation, the City of Boston, and the Boston Private Industry Council had developed some strategy and infrastructure to the high school and college space. Additionally, many of the BOA partners were already supporting these partnerships through their respective foundations. including Barr Foundation, the Boston Foundation, Nellie Mae Foundation, among others. Rather than create a new initiative, these partnerships, already being led by core Opportunity Agenda members, were co-opted and folded into the broader BOA partnership pipeline. Both public-private partnerships themselves with independent governance, Thrive in Five and Success Boston were in the early years of existence (both launched in 2008) and thus were still in development.

This left the respective Opportunity Agenda working groups to strategically influence and assimilate the co-opted initiatives. These partnerships were largely slotted in and then aligned in concert with the BOA. For example, at that point (2008-2009), Thrive in Five was finalizing the partnership's goals and the Opportunity Agenda pushed the group to do that.

The second strategy for identifying and developing initiatives for spaces on the BOA cradle to career pipeline was creation. The Summer Learning Project (on track for high school graduation) holds a unique position as it was the first initiative that was created in part by the Opportunity Agenda. In conjunction with the BASB[28] organization, led by executive director Chris Smith, the BOA worked diligently to affect change to the summer school model and address summer learning loss.

In contrast to Thrive in Five and Success Boston, initiatives that had been previously established, the Summer Learning Project needed extensive development. As Greeley reported, “here's another area of the educational pipeline that has no system, no system at all, except for summer school, which is, you know, something that even the people leading summer school didn't have much affection for” (S. Greeley, personal communication, June 2015).

During the same time period that the working group, led by Pat Brandes of the Barr Foundation, was examining this space, Barr Foundation asked Chris Smith of BASB to examine all of the service providers to students in the summer. Thus, this relationship helped bring the Summer Learning Project planning to fruition. At the beginning, Chris Smith (BASB), Rahn Dorsey (Barr Foundation), Steve and Beth Greeley worked in 2009 into 2010, with participation from staff from Boston Foundation including Elizabeth Pauley, the Barr Foundation, and Nellie Mae Foundations, among others, to develop this idea of using

[28] BASB’s formation in 2005 had come out of two previous initiatives: the Boston 2:00-to-6:00 After-School Initiative, the first-in-the-nation municipal after-school office, and Boston’s After-School for All Partnership, a collaboration of 15 local funders and the City of Boston that raised $32 million for out-of-school time efforts.

summer time to address the summer learning loss issue typically experienced by students. Meetings were held at the Barr Foundation each Friday afternoon. As Smith noted,

> I remember those cold dark nights in the winter walking back from Barr thinking, is this ever going to take shape, is anything going to happen? We were getting ready for our meeting with the Opportunity Agenda. Then 2010 came, we [Rahn and Chris] had a meeting with the CEOs and I want to say in April and May and so look based on Classroom at the Workplace [a Private Industry Council model]…we had this model where we could get teachers and kids in really cool community settings doing a holistic, academics and enrichment type of program where programs can play to their strengths and really do what they do for kids who otherwise would not have found their way to a program. Teachers might get a lot on being in this new setting and kids will not just get sent to a summer school but get a more enriching experience. (C. Smith, personal communication, March 2015)

While the BOA leadership group expressed concerns about the tight time frame, BASB was anxious to start that summer of 2010. Dorsey and Smith argued that they would learn more by doing rather than an additional year of planning and launching in summer 2011. Ultimately, the Opportunity Agenda leaders agreed and provided $600,000 for the project to launch in the summer of 2010.

That initial summer included non-profits such as Thompson Island, BELL, Sociedad Latina, and the Private Industry Council partnering with schools, specifically the newly designated “turnaround schools”[29] of the Boston Public Schools. These service providers had different measurement tools but were now being asked to use the same tool- the Achieve, Connect, Thrive (ACT) Framework. This consistency of measurement was important as the BOA pushed Chris and his team to think of how their idea could be more than just a program and really think about impacting and shaping the issue of summer learning loss.

The common measurement derived in part from two guiding principles of the project. As Chris Smith described,

> One is that these programs would be rigorous enough to count for credit and engaging enough to attract kids and their families voluntarily. We wanted them to be so engaging that kids wanted to come, but they would be as rigorous as summer school, which classroom in the workplace always was. The other is flexibility of approach and consistency in measurement, so you can do whatever you do well. Sociedad Latina can do arts and entrepreneurship at Simmons College. Thompson Island could do Salt-Marsh exploration. PIC could do jobs. You do what you do well, and we are going to measure you in the same way. That approach has also been pretty resilient and has helped shape the issue. That has evolved in ways that we never expected. (C. Smith, personal communication, March 2015)

After the initial Summer Learning Project in 2010, planning at the Barr Foundation on Friday afternoons continued. Melissa Partridge, from the BPS, noted the group’s commitment, “…it

[29] These five schools were: Blackstone Elementary, Dever Elementary, Harbor Pilot Middle, Orchard Garden Pilot K-8, and Trotter Elementary.

was very consistent every Friday for two hours at the Barr Foundation in the conference room. Now that I've been in other types of group work, it was really remarkable how people really helped keep sacred that time" (M. Partridge, personal communication, April 2015).

Finally, planning for the adult learning goal termed "Post Secondary Attainment" also developed. In reference to the adult learning environment, Greeley noted some similarities to the early education landscape prior to the creation of Thrive in Five. He remarked,

> It [early childhood education before Thrive in Five] was a collection of programs, and the same thing with adult education, a collection of programs and services that, number one, didn't connect anything, weren't career guided, and actually stopped short oftentimes of making someone ready for college. (S. Greeley, personal communication, June 2015)

It was a space on the educational timeline needing attention and a creation of an initiative. The Opportunity Agenda termed their work "The Adult Opportunity Network" designed to "link state-funded Adult Basic Education programs (including English for Speakers of Other Languages) and deliver enhanced academic and other supports to ease the transition to college" (Boston Opportunity Agenda Annual Report Card, 2011). As mentioned before, this initiative never gained a lot of traction and subsequently the partnership pivoted and moved in other directions. This process was described in more detail in the finding to research question: How did the Boston Opportunity Agenda develop from 2010-2019?

The second type of strength reported was more descriptive and is characterized by the connection to the human capital of the partnership. The three areas discussed below are dedication to the work, appropriate staffing, and trust. All of the responses demonstrated, either explicitly or implicitly, a recognition of a positive experience in and strength of the partnership.

High Levels of Dedication

A strength of the partnership was both defined as, and attributed to, a high degree of dedication to the work. This dedication manifested itself at the initiative level in commitment to the Summer Learning Project planning meetings both in terms of time and energy. The group met faithfully each week for several years (2010-2013) and the team members (Kristin McSwain-BOA Executive Director; Melissa Partridge-Boston Public Schools; Rahn Dorsey-Barr Foundation; Chris Smith-Boston After School & Beyond) and were focused on the planning and implementation of the project. As Partridge remarked, “I think without those regular meetings, it [The Summer Learning Project] wouldn't have gone off with the quality, consistency and efficacy that it had and still has” (M. Partridge, personal communication, April 2015).

Dedication to the partnership and the impact it brought was also shown by the establishment of the Executive Director position for the BOA and a willingness to fund the position by its members. While dedicated to the partnership, each partner organization’s CEO has a multitude of responsibilities beyond just their participation in BOA. Similar to the concept of the backbone organization as a component of partnership success through collective impact, a dedicated staff member or organization provides the necessary infrastructure and management and “who can plan, manage, and support the initiative through ongoing facilitation, technology and communications support, data collection and reporting, and handling the myriad logistical and administrative details needed for the initiative to function smoothly (Kania & Kramer, 2011, p. 40)". Reverend Hammond vocalized the sentiment of the group, "There has gotta be somebody who gets up every morning really thinking about this, and that's exactly what Kristin (McSwain) has been" (R. Hammond, personal communication, 2015). For a partnership as wide in scope as the Opportunity Agenda, the Executive Director position plays the role of convenor and connector for the various initiatives. As United Way's Karley Ausiello described, "I think when you step back and think about the theory of it all, it makes sense because we want to have these really strong public private partnerships along the pipeline, but then you need to have that connective tissue for how it's all working" (K. Ausiello, personal communication, May 2016).

Appropriate Staffing

The level of staffing for the BOA was perceived by a number of partner participants as being appropriate to support partnership success. This perception applied to multiple aspects of the partnerships. For instance, the CEO partner meetings and the initiative meetings were attended by senior leadership of the partner organizations. One of the tenets of the CEO partner meetings was that the CEO themselves would attend and not send designees. This allowed for efficiency for the partnership's development as the decision makers were at the table themselves. There wasn't a need for representatives to return to their organizations to persuade the CEO and develop buy-in. That participation and investment was in place already.

Over time, the rule about CEOs exclusively attending the meetings seems to have been relaxed. In some instances, the CEO might be joined by the organization's senior advisor. This senior leader often held a position in the organization's funding/development or education departments. Elizabeth Pauley, the Associate Vice President, Education to Career at the Boston Foundation and Karley Ausiello, then Staff Leader of Community Impact are two examples of senior leaders who attended meetings either alongside or in place of their respective CEOs. This adjustment in practice has its benefits as it increases buy in from other members of the partner organizations. As Board Chair Hammond noted regarding this change, "I think what's been good, actually, has been having a little flexibility so that their senior person in education is coming and trading off (with the CEO), or coming together with the issue. I would think that is even better in some respects because it can't all come from the CEO. They've got to have some buy-in at that senior, but not necessarily CEO, level. I think that's been good. I think it's actually worked out well" (R. Hammond, personal communication, April 2015).

Second, a person(s) designated to convene the core partners was noted as successful. This role was filled by the original board chair, Reverend Hammond, and later coupled with partnership Executive Director, Kristin McSwain in 2011. For Hammond, the addition of McSwain was critical as the partnership started to "get legs" that there was someone and that his role was to support her (R. Hammond, personal communication, April 2015). These figures planned the meeting agendas, with partner input, but also fostered a meeting space where all partners felt heard (in and out of meetings) and supported to contribute as they were able. The hiring of an executive director also brought more focus and detail to the work as expressed by an initially reluctant, Nick Donohue of Nellie Mae, "I would say a very positive thing with getting Kristin McSwain on board, I had questions about whether we really needed the weight of a management layer like that, but I think it helped us enormously be more methodical about our work" (N. Donohue, July 2015).

Recognition of the value was demonstrated by shared financial support. Unlike other educational partnerships where the leader might have to fundraise to cover their own salary, the CEOs had dedicated funding to this position when bringing McSwain aboard in 2011. Just as the group had meetings to determine whether to continue work with DCA Consulting's Steve and Beth Greeley during the planning stages before launch, the BOA conducted an annual review of the executive director. The review was normally conducted by a smaller sub-group of the BOA principal leaders and then reviewed by the entire group. Included in these discussions were determinations of funding levels by each individual institution for the position's salary. The actual payment of the executive director salary was then paid by the Boston Foundation with these contributions.

At the CEO level, the institutions periodically re-committed themselves to the Opportunity Agenda during the initial five years most typically as members left, or new organizations joined. These transitions provided natural moments of reflection regarding the purpose and direction of the partnership. As noted above, the commitment never explicitly entailed a specific funding figure and so the funding process described continued as the years of the Opportunity Agenda advanced.

The Executive Director was also valuable in the decision making process for the core partners, where the process generally followed a "discussion until consensus" protocol. Typically, ideas were thoroughly discussed with partners sharing their perspectives. This process was often facilitated by the Executive Director, Kristin McSwain, to move toward that consensus, or a modified consensus. "I see one of Kristin's real strengths is she's able to facilitate that conversation, pull out the threads of agreement, test the threads of agreement back with the group, and then continue to check for understanding. 'Like, it seems like what we're saying here is we want to do this. Does anyone else'... Then if somebody is like, 'no I don't want that', they'll talk more" (K. Ausiello, personal communication, May 2016). In addition to this process, some decisions were made by votes taken as a show of hands. Of note, these processes described were not formalized as official protocol and any given decision may have evolved from other processes than described here.

Finally, at the initiative level, the appropriate staffing for effective planning was critical to the Summer Learning Project group (R. Dorsey-Barr Foundation; M. Partridge-BPS; K. McSwain-BOA; and C. Smith-Boston After School and Beyond) . Commenting on the success of the group, Dorsey opined, "I think it was having the right people at the right levels in their organizations working together now. You got Chris at the table who is an Executive Director (ED). You got Kristin at the table who is an ED, who de facto had the trust of her 15 bosses (the CEOs of the Opportunity Agenda). The right people at the right levels working together consistently to move things and build trust" (R. Dorsey, personal communication, April 2015).

Trust

The development of trust amongst partners was also recognized as a strength of the partnership. As just described, the Summer Learning Project planning consisted of representatives from various organizations in the partnership. As a result of the time spent working on the project together, trust was developed and respect for each representative's knowledge was expressed.

> The other thing though is everyone took their expertise, and the group deferred to whoever's expertise it was. For instance, people deferred to Chris when it became a nonprofit question. I mean, we would weigh in, but it would be left to him for ultimate decision making although it wasn't explicitly said. Anything on the schools, Melissa, we defer to you. On the funder front, Kristin was our go to resident expert. On the evaluation systems processes, Rahn really was our go to on that. (M. Partridge, personal communication, April 2015)

By valuing each member's contributions, the group promoted partner buy in, which supported successful quantitative outputs. Dorsey echoed the sentiment of trust and collaboration within this group and felt it was exceptional. This trust also fostered a smoother and more effective partnership for the SLP. Melissa Partridge described the process for identifying non-profit organizations and schools in the district for participation in Summer

Learning. “If Chris (Smith) said, "I don't think this non-profit is going to work out or this non-profit is hot to trot and we need to bring them in," we were like, "Cool, go." That was good. When it came down to bringing schools in the fold, it was like, "Melissa whatever the rhyme or reason for the school pairing, we trust you. Just explain to us what it is," which is nice.” (M. Partridge, personal communication, April 2015). The trust kept the partnership moving forward with decisive decision making instead of getting bogged down with internal dissension and conflict.

In the core partner CEO meetings, Michael Middleton observed trust and goodwill in his time representing Umass-Boston. He described in terms of determining which spaces on the pipeline to focus at a particular time , “I feel that goodwill among the principals (CEOs) who sit there, although it also speaks to a partnership where different people are going to take leads over time, so you have a partnership where folks don't mind stepping back or stepping forward as initiatives roll out. I think that it takes good will that people can work together and they'll get to everybody's priorities over time” (M. Middleton, personal communication, May 2016).

This trust was additionally extended to the funding process as pre-existing relationships were deepened and new relationships within the partnership was strengthened. With multiple initiatives developed involving multiple combinations of BOA core partners and community partners, coupled with varied funding sources, there wasn’t a codified funding process for these initiatives of the BOA.

Initially though, the funding most typically sourced from individual foundation's pre-existing commitments to the educational spaces, although there were reportedly some additional funds from Bob Beal and Robert and Myra Kraft and others. Thus, the announcement at the formal launch in June 2010 that BOA was launching with $27 million may have caused confusion. As Rahn Dorsey described, "there was an early statement about 27 million dollars in funding for pipeline reform. Well, if that was the right number, probably 25 million of it was already committed at the time of the announcement to initiatives because a lot of the individual foundations just brought their planned giving to the table and chalked it up to the pipeline reform effort. Thrive in Five predates the Opportunity Agenda, but that became an initiative of the Opportunity Agenda. Success Boston was the same thing. There were a couple of other things like that" (R. Dorsey, personal communication, April 2015). These resources committed to and aligned with the Opportunity Agenda were one initial funding process.

However, during the planning part of the partnership, the working groups for each area of the educational pipeline were meeting to identify opportunities within their respective space. They wanted high impact, doable, measurable reforms. Through a combination of research, funder passions and partner desires, the groups, chaired by leadership group CEOs would bring opportunities back to the leadership group at large. At this point, the leadership group weighed in with feedback – does this meet our criteria? Can we leverage this for high impact? What areas need funding and at what level?

This vetting process engaged in by the core partners led to another process for funding. Initiatives were presented to the core partner groups to evaluate for funding. In some instances, specific intermediaries, such as Boston After School & Beyond (BASB), would typically pitch their ideas to the leadership group. Other times, ideas were brought forth by Executive Director McSwain. In all cases, the original motivation for funders to hear about opportunities in one forum was utilized. The previous process of individual pitches to each foundation was streamlined for more efficiency. The core partners would discuss, provide feedback for improvement and determine who might be willing to fund and at what level. This discussion of funding balanced several factors- the general vision of the group as a whole, any individual partner (the CEO) beliefs, and the mission of the organization that the CEO represented. Nick Donohue described this dynamic, “ I think it was a genuine intention of wanting to have some shared understanding and direction as a group, but understanding that in the end, things get funded more programmatically and if two or three funders are putting up the dollars, that's what defines the relationship with the grantees and the rule of engagement” (N. Donohue, personal communication, June 2015).

Thus, the actual grant process was done individually, however, as there was no shared pool of money. For example, while BASB may have “pitched” to Boston Foundation, Nellie Mae and Barr Foundations and others collectively as part of the Opportunity Agenda, the applications for funds were still made directly to each individual foundation with their own specific criteria on when to report, when to reapply, etc. So, the implementation of the grants and the operational mechanics of the process still remained at the individual foundation level.

These partnerships and intermediaries leading the Opportunity Agenda initiatives (BASB, Success Boston, Thrive in Five) had additional sources of funding outside of the BOA partnership. They also applied to grants with other foundations that did not identify with BOA; received federal and state funding; and engaged in a variety of fundraising activities typical of a non-profit. These three partnerships or intermediaries would then distribute these funds to the community partners engaged in the work, in accordance with the grant requirements of the funder.

One example that illustrated this flow of funding is the Summer Learning Project. BASB would use their grant from BOA to fund specific summer sites including Thompson Island, Courageous Sailing, Math Power (all non-profits themselves), among a multitude of others. These BOA funds channeled through the BASB would typically be a supplementary source of income to the community based providers and increased organizational capacity. The BASB would then be responsible for data measurement and evaluation. These results would be shared back both with the providers themselves as a form of feedback but also with the BOA funders as a report on the impact of their investment. The following year, the funding cycle would repeat itself.

A degree of trust between these co-opted partnerships and intermediaries and the CEO level of the BOA was present even at the earliest stages of the partnership. The philanthropic community within Boston is small and thus some of the key players within the foundations and educational partners had relationships. Furthermore, in the instances of Thrive In Five and Success Boston, key BOA funders (United Way, Boston Foundation, Barr

Foundation, etc) were already supporting this work prior to the BOA launch. Moreover, the planning and work groups for each initiative were filled by key leaders of the BOA funders including Rahn Dorsey (Barr Foundation), Elizabeth Pauley (Success Boston) and others. These overlaps and relationships helped ensure funding for these initiatives. David McAuley (BASB) commented, "Our philanthropic partners provided guidance, insight, and frameworks for our work, so their eventual financial investments to support the work went beyond dollars, to also including catalyzing buy-in across the city. Everyone took notice of our work because of the well-known players at the table who were shaping it."(D. McAuley, personal communication, June 2015).

Another source of connective tissue remained during the early years of the Opportunity Agenda. Kristin McSwain, BOA's Executive Director, maintained close relationships with these entities attending meetings, email and providing leadership. Again, David McAuley remarks reflected the trust and comfort level with the funding process that was created particularly after the first year of the Summer Learning Project. "Sometimes we didn't get the full amount we asked for, because maybe some mechanism happened where they said, 'Oh, we only have like $25,000 available instead of $50 [thousand] or whatever.' Yeah, we were always confident we were going to get something based on those conversations" (D. McAuley, personal communication, June 2015).

Challenges

Partnerships, of all shapes and sizes, face challenges and the BOA was no exception. A series of member interviews and analysis of documents disclosed that partners perceived challenges in the area of funding as well as communication between the various initiatives. A closer analysis revealed the funding challenges represented three categories: the economic environment, values and priorities, and sustaining commitment in the time span of 2007-2016.

Economic Environment

One reported challenge was funding. For the education and philanthropic worlds, this challenge is common and frequent. These entities can be highly influenced by the larger economy. As mentioned, the economic environment at the time of the initial discussions about the partnership concept (2007) proliferated an extreme optimism about potential funding levels. Images of a shared pool of $100 million or more to tackle the problems of education in Boston were envisioned. These thoughts were tempered by the 2008 housing bubble crash and the realization that there was no significant new money available for this initiative. Rather, the Opportunity Agenda would have to utilize existing funds from the individual foundations. Thus, while the BOA launched to great acclaim in 2010 boasting of a pool of $27 million, the reality was that the vast majority of funds pre-existed this new partnership and were not the result of the Opportunity Agenda. The preliminary funding ambitions were replaced by the changing economic realities.

The economic environment continued to constrain the reach of the BOA during the first five years of existence. There were budget constraints both in state and local funding. Boston Public Schools faced budget deficits, sometimes extreme, during the years of 2010-2015. The Summer Learning Project, a key initiative on the BOA pipeline, was 80%

privately funded with the BOA serving as a key contributor. There were additional large pools of funding coming from the Wallace Foundation and the Walmart Foundation, along with whatever additional funding that the individual sites that hosted summer learning had culled together. However, the initiative did depend on a 20% match from BPS in order to fully implement this emerging change to the summer learning environment.

This proved to be an annual challenge. As Melissa Partridge (BPS representative during the Summer Learning Project planning) described, “we would go through this anxiety thing of: Is the district 20% match going to be there? Then it got into the song and dance and me sitting with the superintendent and being like, ‘Wallace is going to walk away. The Opportunity Agenda is going to walk away.’ You're going to let a million dollars walk off the table by not even saying, ‘Yes. No matter what happens to the budget, the Summer Learning Project will be there” (M. Partridge, personal communication, April 2015).

This annual anxiety dance was exacerbated by the calendar for the Boston Public School budget process. BPS budgets are approved by the school committee typically during the last week of March but not officially confirmed with final approval until June 30th by the Boston City Council. This leaves the Summer Learning Project planning during the springtime without officially having solid funding. This affects a wide range of organizations and individuals including the Boston After School & Beyond staff, Boston Public School partnership staff, the community-based organizations providing the summer services and families who are trying to make summer plans for their children.

Another example of funding challenges are the community partners, the individual non-profit providers that host the Boston students as part of Summer Learning at their sites, faced similar budget constraints. Thus, while the BOA may have provided financial support, most commonly the community based organizations combine a variety of funding sources. Some are dependent on state funding. The Boston Private Industry Council (PIC), a summer learning site through their "Classroom in the Workplace" initiative, noted reduced capacity for programming in the summer of 2016 as the result of Governor Baker's budget cuts (H. Brayton, personal communication, April 2015). The central point here is that while the BOA is a strong funder of the initiatives in their pipeline, they are not the exclusive funder. Thus, the external economic environment can bring funding issues to BOA activities. However, this challenge is mitigated by the Opportunity Agenda's role as a convenor of partners and a model of drawing from multiple funding sources for initiatives.

Values and Priorities

In addition to the funding challenges due to external fiscal realities, the BOA and its initiatives encountered internal challenges. The partnership's leadership group consists of a cadre of funders representing their respective organizations. These organizations individually have unique missions and a responsibility to maintain fidelity to those missions. While all of the principal funders seated at the table, the Boston Foundation, the Barr Foundation, the Nellie Mae Foundation and Combined Jewish Philanthropies, among other nonprofits (Eos Foundation, New Profit) had a common interest in supporting education efforts and an explicit commitment to the Opportunity Agenda itself, individually each organization determines which pipeline initiatives align with their mission most closely. As Nick Donohue, Nellie Mae Foundation Chief Executive stated, “I can’t just go to my board and say to them that I made a $1 million grant to improve early education right after I finished telling them about our plans for high school redesign” (N. Donohue, personal communication, July 2015). There is a tension between the missions of the partnership as a whole and the partnership members.

As Rahn Dorsey (Current Boston Chief of Education) recalled from his role at the Barr Foundation and a member of the Opportunity Agenda, “There's never really been a pooled fund, but it's almost been like an agreement to sit at the table and create a shared perspective on priorities, but accountability for acting on those shared priorities has not always been as strong. This is, to me, a continuing challenge of the Opportunity Agenda is that it's a relatively low accountability network. Folks come to the table, folks talk, and there's even some alignment, but there's not a lot of collaborative investing. Organizations are still allowed to maintain their institutional strategies, maintain their focus” (R. Dorsey, personal communication, April 2015). The low accountability structure of the BOA and the need for individual foundations to be responsive to their own boards resulted in cases of less equity in regards to funding distributions along the pipeline.

Having been co-constructed and reviewed by the CEO group, there was broad support for all of the initiatives of the pipeline areas: early childhood education (Thrive in Five Partnership); K-12 education (Summer Learning Project); college completion (Success Boston); and adult education (The Adult Opportunity Network). However, as described, funder missions resulted in some initiatives feeling less supported than others. Primarily, the area at the beginning of the pipeline, Thrive in Five, and at the end of the pipeline, the Adult Opportunity Network perceived less funding than the K-12 education space and college completion. Kimberly Haskins of Barr Foundation noted this dynamic in 2015, "There are more funders at the Boston Opportunity Agenda table, who are K-12, or the other end of the continuum, than there are in early education. I would say that there has not felt like there was as strong a connection" (K. Haskins, personal communication, March 2015).

Some of these inequities resulted from pre-existing commitments to various initiatives that were folded into and then included in the Opportunity Agenda. Specific examples of this are the Boston Foundation's support for Success Boston and the United Way and Barr Foundation's funding[30] of Thrive in Five partnership.

Philosophical disagreements among the funding organizations on how best to reform education in Boston also contributed to distinctions in funding. So, though there might be common interest between partner organizations in a specific portion of the pipeline, a particular initiative or funding opportunity presented to the leadership may interest one foundation more profoundly than another. This led to different support levels. Donohue, of Nellie Mae, described this dynamic, "I think it was a genuine intention of wanting to have some shared understanding and direction as a group, but understanding that in the end, things get funded more programmatically and if two or three funders are putting up the dollars,

---

[30] As the result of shift in strategic plan in 2015, Barr Foundation now focuses support at the high school level (Barr Foundation Education Overview, 2018)

that's what defines the relationship with the grantees and the rules of engagement" (N. Donohue, direct communication, July 2015).

Some of this discord stems from the nature of the philanthropic world. Generally speaking, the philanthropic world favors programmatic remediation. It's generally quick, there are visible results, and provides a level of funder satisfaction. The BOA (some more than others) was pushing for larger system changes, rather than individual program funding, and this purpose may have put them at odds with some individual foundation influences.

Sustaining Commitment

Finally, a challenge for partnerships in the nonprofit world is the sustainment of funding commitments. BOA initiatives encountered funder fatigue and even funder amnesia during their early years. Melissa Partridge (BPS Director of Expanded Learning) explained, "Usually funders get fatigued with funding programs and then say, 'go find your own money, or the whole plan was for you to sustain this" (M. Partridge, personal communication, April 2015). As she noted, the non-profits are providing the programs because they are receiving the financial support from funders. If they didn't need the money, then they wouldn't be seeking grants. In addition to BPS's annual budget issues and shaky financial commitment, there were occasions of foundations needing to be reminded of their previous commitments. Dorsey described some instances where a particular funder had made a two-year commitment and would require reminding as the second year of funding arrived. Despite these challenges, the Opportunity Agenda funders' overall commitment to education reform are illustrated by, but not exclusive to, the Boston Foundation's more than 10 years of support of

Success Boston, Nellie Mae's continued support of Boston After School & Beyond and the Summer Learning Project, among others.

Cross Initiative Communication

In partnerships, there is a need for both internal and external communication. Internally, a partnership with a wide scope such as the BOA necessitates continuous communication to maintain high functionality. There is communication internally both formally and informally. Examples of formal internal communication would be meeting agendas, meeting presentations, and reports on initiatives to name a few. Informal communication is completed through emails, phone calls, unplanned in-person encounters between members, social events, among other forms. The partnership also communicates externally. Partnerships may publish and distribute reports generated by the partnership itself as well as other published reports of interest, community meetings may be announced and then held, press releases, a partnership website are a sampling of examples.

The BOA communicated in a variety of manners as well. In fact, in the spirit of the first principle (making data public for accountability), annual report cards are generated to publicize progress towards the targeted goals within each of the partnership's initiatives[31]. The process for their distribution begins with a public announcement of the results to a group of interested community stakeholders at a meeting held at various sites in Boston; then the annual reports are distributed; and finally, these reports are posted to the BOA website and are available to the public for download. These report cards, along with the reports

[31] There were nine report cards released from 2011-2021.

commissioned by the BOA as well as the individual partners themselves, serve as external communication. The partnership is communicating the progress of the partnership with the public at large. These annual report card events also acted as an opportunity for cross initiative communication.

However, these report cards were one of the few formal opportunities for discussion between the various initiatives on the pipeline. Melissa Partridge, then of the Boston Public Schools described the working process for each initiative group as, “You stayed basically in your lane, except Opportunity Agenda would have their report card event where they would report out on each of their initiatives and you would mix and mingle with people there. It was never the Summer Learning Project and Success Boston intertwined in the same meeting. They're all kept very separate as initiatives. I'd say it's more informally crossed paths except for the report cards” (M. Partridge, personal communication, April 2015). Jane Tewksbury, of Thrive in Five, echoed that sentiment. “It's an interesting consortium because we don't actually...As the pieces of the Boston Opportunity Agenda, each piece operates independently” (J. Tewksbury, personal communication, April 2015).
The formal communication between initiatives seems to lie exclusively at the CEO level as those individuals (and their organizations) were often involved in multiple spaces on the educational pipeline and would be privy to the workings of each initiative group. Between meetings, Executive Director McSwain, along with Board Chair, Reverend Hammond worked diligently with one on one conversations with individual partners to reach understanding and to keep the group momentum moving forward.

While not codified, informal communication within the partnership mitigated some of the structural constraints. As Partridge noted, “I'd say just very informally, Boston is so small. All the same people work on all the same stuff. {For example] Success Boston, Elizabeth Pauley, who sat on Summer Learning Project planning is leading Success Boston effectively. It was just a byproduct of knowing Elizabeth, I would know about Success Boston or also being in the district, these four initiatives touched the district so I would hear or be in conversations where some of those would cross over” (M. Partridge, personal communication, April 2015).

Summary Of Finding Three

While not exhaustive, this research found perceived successes and challenges to the BOA partnership. In review, the successes were distributed between increased visibility, development, and performance of initiatives by the partnership and a representation of strengths in human capital (dedication, appropriate staff, trust) while the challenges were variations of a central challenge of funding (external environment, values and priorities, and sustainment) as well as communication. It can be expected that the partnership encountered some of these successes and challenges in later years as well as enjoying new successes and tackling new challenges as both the internal and external environment of the partnership evolved.

Finding Four: The Influence Of The Boston Opportunity Agenda On BPS

Introduction to Finding Four

While the BOA is constituted by more than 12 partners, the Boston Public School District as a partner holds a unique position. The BOA has established a cradle to career pipeline with initiatives coordinated and constructed along this spectrum. While all spaces are important to its work, the K-12 space represents the longest and largest continuum within the timeline. Essentially, the early education space on the pipeline prepares students for K-12 success and the post-secondary attainment space measures and demonstrates the efficacy of the K-12 space. With the vast majority of students attending Boston Public Schools, approximately 70% (BPS At A Glance, 2020-2021), the Boston Public Schools are a central member of this partnership. As such, a focus on this relationship and the influence that the Boston Opportunity has on the district was merited.

This study revealed the nature of this relationship and examples of influence. While the research posed: What influence does the BOA partnership have on the Boston Public Schools? The evidence indicated that the influence is two-sided. The findings are described in the following section.

Existing Relationships

The official partnership between the Boston Public Schools and the BOA began around 2008 at the behest of Mayor Thomas Menino. At that point, some discussion and planning of the BOA had been conducted by leaders of the Boston Foundation, the United Way, the Combined Jewish Philanthropies, among others and would best be characterized as a funder's collaboration. With the arrival of BPS (and others) to the planning table, the possibility of influence began prior to the formal launch of the BOA partnership.

In fact, philanthropic foundations in the BOA partnership already influenced the Boston Public Schools prior to the BOA creation as pre-existing partnerships had been formed. An example of this was when the Barr Foundation gave the district an Institutional Advancement Grant to develop in a strategic way a partnership office and a development arm as it was something the district had lacked. Barr wanted the district to institutionalize its capacity for development and partner management and had provided the funding to support (M. Partridge, personal communication, April 2015). The Boston Foundation provides an additional example. As the lead partner in Success Boston, the Boston Foundation, was working with and thus had a level of influence on the Boston Public Schools prior to the BOA. These relationships and connections of individual foundations demonstrated pre-existing levels of influence which continued after the Opportunity Agenda was rolled out. In this section, when the influence of the Opportunity Agenda is discussed, the intention is to describe the influence of the BOA partnership as a whole. The evidence was demonstrated in three areas: structure including specific initiatives, visibility, and relationships.

Influence on BPS

The BOA's structure has features that promote influence on the Boston Public School district. Since the partnership's inception, the sitting superintendent of the BPS has held a seat on the board of the partnership. The five superintendents (including interim) that have led the Boston Public Schools district during the time of the BOA have attended the CEO meetings regularly (though some superintendents more than others). As such, BOA had a regular audience with the superintendent and engaged in dialogue concerning the partnership agenda as well as hearing about the district's priorities. As the partnership has matured, the familiarity between Opportunity Partnership leaders, particularly Executive Director Kristin McSwain, and Boston Public School leadership, has certainly strengthened. This connection demonstrated a partnership asset appreciated by the partners, "I think one of the things that the group likes is that Kristin has a strong relationship with the superintendent, with other people in BPS, and so she is able to do that back and forth: Where can we help you, here's what we think, here's an area we're talking about, what's happening here? I think that's an interesting place for us to be and I think that's something that people really like about Kristin's role. I think that the folks around the table probably have strong opinions about how things should happen, and I think getting some of those ideas out to BPS is part of it too" (K. Ausiello, personal communication, May 2016).

Increased familiarity may have contributed to BOA participation in the most recent (2019) superintendent search. The BOA's Executive Director, Kristin McSwain served on one of the interview committees for the candidates (Loconto, 2019) and while this research does not suggest that the Opportunity Agenda influenced the selection of the candidates, her involvement reflects partnership influence on Boston Public Schools. In summary, by constituting a board and partnership structure with BPS included, access and influence is assured.

The partnership working group structure also helped exert partnership influence on BPS. The Summer Learning Project's development illustrates how BOA influence was present. As the working group was staffed by both BPS, foundations within the partnership and Executive Director McSwain, there was a continual and intentional exchange of ideas and priorities in order to develop Summer Learning. That in itself exemplifies influence.

However, even after the initiative was developed and had entered a sustainment phase, BOA influence still existed. The increased visibility of the initiative was beneficial, especially when budget constraints faced the district. Melissa Partridge noted, "that has also been helpful to save the Summer Learning Project, to have people like Rahn (Dorsey) and Kristin (McSwain) and Chris (Smith) having this collaboration. More people are involved, therefore there's more pressure to do it. There's more exposure and higher visibility because there's more people in it. That I think helped keep it going and transitioning through, despite whoever (the different superintendents) was driving it" (M. Partridge, personal communication, April 2015).

Specific initiatives of the Boston Public Schools that aligned with partnership priorities was another area of influence by the BOA. An example of this influence is chronicled here. One important benchmark of the BOA pipeline was third grade reading proficiency. As a domain of the Boston Public Schools, this benchmark was of importance as well. The partnership worked as a support and accelerant to improving the data. As Debbie Rambo stated, "I think having an outside group say, 'We want to look at this with you and we want to bring some resources to the table to help you fix it.'...that's a very helpful community conversation and a good way for the private sector and the public sector to interact" (D. Rambo, personal communication, May 2016).

Other instances stemmed from direct outreach from BPS to the BOA. An example found by this research was during the district's new school choice strategy. As Rambo recalled, "the Boston public schools came to the Opportunity Agenda to ask for some grant help to figure out their new school choice strategy. That was something that a lot of the groups sitting around the table were very interested in funding...I remember the first presentation from the Boston public schools wasn't as helpful as it might be around school choice. The foundation world was able to drive that process a little bit into thinking about a more complete and certainly better funded, but a more complete process than it might have been if the Boston public schools had not asked them" (D. Rambo, personal communication, May 2016).

A more current example of BOA influence on BPS derived from the publication of a report commissioned by the Opportunity Agenda titled, *College, Career and Life Readiness: A Look at High School Indicators of Post-Secondary Outcomes in Boston.*[32] After convening a group of Boston stakeholders in education during the 2017 year, the BOA created a definition for college, career, and life readiness (Boston's College, Career & Life Readiness Definition, 2017). This report researched and reviewed national literature and identified 5 indicators that predict student success as demonstrated by college completion. The group,

---

[32] Full report is here. https://www.tbf.org/-/media/tbf/reports-and-covers/2019/boa_readiness-report-201903-v2.pdf?la=en

along with the help of Bob Balfanz, a researcher from the Everyone Graduates Center at the Johns Hopkins University School of Education, utilized system level data from the Boston Public Schools to test three of those indicators (the indicators to which they had data access): access to rigorous coursework, GPA of 2.7 or higher, and 94% attendance rate or higher. The group determined that they were strong predictors of success (Male, 2019).

As the result of the published report in March 2019, the interim Superintendent of Boston Public Schools, Laura Perille, announced the intention for the district to create 6 working groups to address and examine the following areas in the system:

1. Academic rigor and graduation requirements
2. School guidance counseling systems and postsecondary support
3. Career education and pathways
4. Alternative education redesign
5. Early warning indicators, with strategies to keep kids on track
6. Grade 7-12 school design (part of Build BPS's long-term infrastructure improvement plan)

As McSwain noted in an interview with the StriveTogether network, "Boston Public Schools...are going to be using this report to make policy changes. They're going to be using it as a guide for school improvement and redesign" and that Catholic and Charter schools in Boston would be doing likewise (Male, 2019).

This relationship supported the membership who saw a support role to BPS as the Opportunity Agenda's function. With a coherent alignment of the work between BPS and BOA, strategic areas that benefitted both can be identified, as noted by Karley Ausiello of the United Way,

> We need to understand more about what the district wants to achieve and how they think they can achieve it, and then think about how the Opportunity Agenda can either speed that along, highlight it, or give them feedback on things. This is where I think, for instance, high school redesign fits in. That's an interesting place where we could accelerate the work and it's obviously moving their agenda forward. (K. Ausiello, personal communication, May 2016)

Limits to Influence

In the presentation of these findings, I described some examples of the relationship and influence between the BOA and the Boston Public Schools. The phrasing of the research question (What is the influence of the Boston Opportunity Agenda on the Boston Public Schools?) might suggest that the school district is an entity operating outside of the partnership, when in fact BPS is a member and thus a part of the Opportunity Agenda. On the other hand, the BOA is a partner to the district but is not a member of the district, both individually as partners and as a whole structure. Nick Donohue described the position of the partnership, "we are a philanthropic group sitting with the agents of the system, the mayor and the school people (N. Donohue, personal communication, July 2015).

This position offered some limits to influence from his perspective and hindered the partnership from making larger systemic changes. “I've always had questions about that because I think there's a benefit to having separate relationships ... There's a distinct body that can then exert itself differently on external parties. When you have everybody as a member of the group, it's like you're going to a party with your girlfriend, and her parents show up. That's a different party”. Donohue continued, “I don't think we're at the point of separating so we can provoke and push. It'll be more partnership but the kind of things that they're talking about are from my perspective and our (Nellie Mae) perspective is more forward thinking and more systems oriented with some bigger impacts and bigger risks, but that's the way it should be” (N. Donohue, personal communication, July 2015).

As designed, the BOA membership fostered an environment that focused on alignment with and enhancement of the agenda of the existing Boston Public school superintendent. Dorsey described the dynamic created when the partnership adopted Dr. Carol Johnson’s Acceleration Agenda, “they were aligning themselves closely with the district. One of the challenges with that was that I think they were still trying to move that agenda forward, but from the outside” (R. Dorsey, personal communication, April 2015).

Rahn Dorsey also acknowledged the magnitude of the Boston Public Schools and an assumption the partnership had with its power, “It's hard to move a goliath. One of the insights that I had, which is a little bit about maybe the hubris of philanthropy, is that however much money, even if it's that 27 million dollars that philanthropy is putting in, that is compared to BPS' billion dollar budget. I don't know why we think that BPS has to jump at our offer" (R. Dorsey, personal communication, April 2015). Rambo's comments affirmed the slow pace of change, exacerbated by the superintendency turnover experienced in the first five years of the BOA, "Making a broad change like this it's slow. It is especially slow when we have the third superintendent in five years. Carol Johnson, McDonough, who was in for a couple of years and now Tommy Chang" (D. Rambo, personal communication, May 2016).

Melissa Partridge provided the district's perspective on foundation funding from her perspective and how she saw some shifts. "That's been an evolution. I'll say this as neutrally as possible. I think in the beginning the district is kind of a jewel that helps partners secure funding, because that's where the kids are, right? Okay. Initially it was like 'Wow thanks for coming to us. You're going to have us get in on this opportunity, this is so huge'. Then as we got savvier, I'm sorry we don't particularly need to be written into other peoples plans, for other peoples benefit. We can start to form our own plans, and go after money. The dynamic is shifting, and not everybody likes that" (M. Partridge, personal communication, April 2015).

Boston Public Schools' Influence on the BOA

As would be expected, this partnership also reflected instances that the Boston Public School influenced the BOA or situations where both the public schools and the Opportunity Agenda have influenced one another. This dynamic existed right from the initial planning stages. For each space on the pipeline, there was a working group which developed the initiatives and metrics to measure progress. This influence of BPS on the BOA partnership was illustrated as many of the original metrics connected to the K-12 space were an adoption of Superintendent Carol Johnson's Acceleration Agenda for the district. Specifically, Thrive in Five and the Summer Learning Project either aligned some of their metrics to the district or adopted metrics that the district was using. An anecdote that Rahn Dorsey provided describes this process.

> Year two, I want to say it was year two. Melissa Partridge, and maybe Chris Smith was in on this too, said, 'look if we want to bring more rigor to this and accomplish the things that the district needs to accomplish, let's peg all this to grade level standards and just pick a couple of standards by grade level, let's look at the analysis of what kids are hitting on MCAS and what they're not hitting on MCAS. At grade 3 let's pick two ELA standards, two math standards, that's what everybody's focusing on for grade 3. We'll do that all the way up to grade 12 in the summer'. Now, we've got a framework to work with that's really responsive to student needs and where students need to strengthen in the summer. We started attacking that way. That was really BPS coming back and saying to us, let's think about aligning this way. (R. Dorsey, personal communication, April 2015)

This "two-way street" of influence is a more logical dynamic as they are members in the same partnership and the Opportunity Agenda focuses on spaces in the timeline which represents district interests. As a partnership, the members should be molding their individual ideas and agendas to fit a unified goal for the partnership overall. This process is complicated. Nellie Mae's CEO Nick Donohue, described this evolution of identify, "I think one of the key indicators for groups like this, and that it isn't always necessary to achieve, is when you start identifying as a member representing your own group in a group, kind of like a confederation, versus walking into the room feeling that your primary identity is with the Opportunity Agenda as its whole" (N. Donohue, personal communication, July 2015). This tension between the values and influence of the individual partners and the partnership as a whole will be discussed further in chapter six.

Summary of Finding Four

This research discovered clear evidence of BOA influence on the Boston Public Schools, though with limitations to this influence. Additionally, evidence informed that the Boston Public Schools influences the BOA as well. As members of the same partnership affecting the same change, there are challenges to disentangling "who is influencing who".

When I first approached this research question (What influence does the Boston Opportunity Agenda have on the Boston Public Schools?), I perceived the BOA partnership as one operating outside of Boston Public Schools instead of alongside the Boston Public Schools. I saw it as an external agent. This research has demonstrated that the dynamic is more complex as the Opportunity Agenda and BPS are both members of the same partnership (in the same circle) and simultaneously each partner member is its own organization. My initial interpretation failed to acknowledge that the group of philanthropic organizations, while working in partnership, are not one entity. Thus, my perception of "two sides", the Boston Public Schools and the philanthropic organizations, was incomplete. Each organization needed to negotiate multiple identities, memberships, and values that guided their influence.

Summary of Chapter Findings

The previous two chapters provided responses to the four research questions asked in the study. This investigation asked two questions (How did the partners develop the Boston Opportunity Agenda from 2007-2019?; Why did the partners join the Boston Opportunity Agenda?) and discovered and detailed the process of the BOA formation and development as a partnership in the first nine years of formal existence. Moreover, by using an array of motivational theories for partnership, this study detailed what forces inspired each partner to come to the table and join the partnership. Next, the chapter detailed the partner perceptions of strengths and challenges. Finally, findings which characterized the influence of the BOA were shared.

In chapter six, these findings about the BOA will be contextualized in both the historic Boston educational partnerships, the Boston Compact and Boston Plan for Excellence, as well as the "collective impact" framework characterized by its membership in the StriveTogether "Cradle to Career" network. Finally, implications for the findings from each research question will be offered and lessons learned from the history of the BOA about the formation and process of public-private educational partnerships will be shared.

CHAPTER 6

DISCUSSION AND IMPLICATIONS

Introduction

This historic case study explored four research questions to learn about the formation of the BOA. These questions were:

- How did the partners develop the Boston Opportunity Agenda partnership from 2007-2019?
- Why did the partners join the Boston Opportunity Agenda partnership?
- What are the partner's perceptions about the strengths and challenges of the partnership?
- What is the influence of the Boston Opportunity Agenda on Boston Public Schools?

The research resulted from a need to better understand the educational partnerships in the city of Boston and was based on the premise that public-private partnerships provide value to urban school districts. Despite their perceived value, there is a vacuum of research around the motivations of partners to join these partnerships and the operational details of these complex partnerships. This case study uses discoveries from a close examination of the BOA to help fill in this gap.

This final chapter summarizes and discusses the major findings of this study, describes the implications of the study, recognizes the limitations, and provides recommendations for further research into this area.

Organization of the Major Findings

The findings of the study are summarized and organized in four sections: the formation and development of the BOA; the partner motivations for joining the partnership; the partner perceptions of successes and challenges; and the influence of the partnership. Each section leads with a summary of the major findings and is immediately followed by a discussion of the findings in relation to the existing literature reviewed in chapter two.

Summary of the Formation and Development of the BOA

The research found that the story of the formation of the BOA was the result of an array of stakeholders coming together to plan, form and operate a public-private partnership to improve the educational outcomes of the students of Boston. Born out of relationships in the arena of philanthropy, a group of non-profit organizations coalesced around a common interest in education to develop a cradle to career pipeline of support for students. With the addition of the Boston Public schools and the Mayor's Office, the determination to create "the agenda", including high leverage initiatives and benchmarks for measuring progress was paramount. By strategies of co-option (Hoy and Miskel, 2008) and creation, four key initiatives to impact four key spaces on the timeline were established along with specific metrics. These were: Thrive in Five (a solid educational platform); the Summer Learning Project (on track for graduation); Success Boston (high school and college completion); and the Adult Opportunity Network (post secondary attainment). With a core partner leadership group formed, funding allocated and community partners organized to provide services, the BOA formally launched in June 2010.

Since the inception, the BOA has developed the partnership in efforts to improve its operation and increase its impact. Details of these updates were described in more detail in chapter four, though highlights are summarized here. First, the Opportunity Agenda agreed to share the funding for an executive director to convene and lead the work and Kristin McSwain was hired in 2011. Additional core partners assisted with the leadership as the table expanded to officially include: other educational entities, the University of Massachusetts-Boston, the Boston Charter Schools, and the Catholic Schools (2015); additional foundations, the Angell Foundation (2018) and the Smith Family Foundation (2021); and the Boston Children's Hospital (2021). Remarkably, the partnership had extremely low turnover.

New initiatives developed over the years of existence as well. Turnover in the superintendency, recognition of still missing opportunities, and a willingness to adapt to partnership learning about what was working ushered in the Birth to Eight Collaborative, Opportunity Youth, the Lumina Talent Hub, High School Redesign and the College and Career Readiness Definition to name a few. Also, some minor adjustments to benchmarks were made. Due to the complexity and longevity, these updates are indicative of a healthy, learning and adaptive partnership.

Discussion of the Formation and Development of the BOA

The city of Boston has long been identified with education throughout its history with its renowned universities in the area and home to Boston Latin, the first public school in the United States, who opened its doors in 1635.[33] Over the years, the city of Boston has been the site of a number of educational partnerships formed to improve educational outcomes for its residents.

The BOA represents the most significant public-private educational partnership in the city of Boston in the time of its existence (2010-present). The research of this case study discovered how the partnership was initially formed and then developed from 2007-2019. In this section, I use a historical lens to examine the BOA formation in comparison to the formation of some previous educational partnerships in Boston. The purpose of this analysis is to determine which aspects of the BOA represent replication, extension or innovation as compared to other prominent historic partnerships in Boston.

While the BOA has no explicit connection to previous partnerships, the relative size of the city of Boston and the intertwine of the educational ecosystem suggests that the Opportunity Agenda's creation and structure was at least influenced by the legacy of the previous partnerships. It is clear that in some ways the BOA mirrors its predecessors though in other ways it has evolved.

[33] https://www.nationalgeographic.org/thisday/apr23/first-public-school-america/

A Historical Comparison

The Boston Compacts (Part I-IV), beginning with its inception in 1982, represented a pioneering public-private partnership supporting education in the city of Boston. These partnerships stemmed primarily from the emerging relationship between the business community and the Boston Public Schools (Waddock & Post, 1991). In essence, the two entities were working towards better preparing the students of Boston to meet the employment opportunities in the business sector of the city. Both partners pledged accountability to each other to meet the partnership goals. Boston Public Schools would promise to improve its educational outcomes by increasing the graduation rate and students achieving...by 5% annually and # percentage points respectively. The business community pledged to employ 100% of these students upon graduation (A History of the Boston Compact 1982-1999; Farrar & Cipollone, 1988; Spring, 1987). The efforts were a “mutual obligation” (Nathan, 1989) and were characterized as a “you do your part and we will do our part” attitude rather than a true collaboration. The partnership was designed to be equally beneficial: improved high schools and a strong, capable workforce for the businesses in the community.

Innovations

Through a historic lens, a few significant distinctions of the BOA as compared to the Boston Compacts emerged. First, the BOA has expanded the breadth of support that the Boston Compacts offered to encompass a cradle to career pipeline. From the onset, the BOA has “bookended” its support for the K-12 space with support for early youth (Thrive in Five and Birth to Eight initiatives) and adults (Success Boston and Opportunity Youth). This demonstrates that it is larger in scope than previous partnerships. The Boston Compact largely limited its reform to high school students when interest was greatest (Compact One) and only expanded its purview to include follow up services for high school graduates (Cronin, 1991; National Alliance in Business, 1989) and early education (A History of the Boston Compact: 1982-1999; An Overview of the Boston Compact: 1982-2010) in later editions when history shows that interest and commitment had waned.

BOA's pipeline model remedied challenges for partnership effectiveness by the Boston Compact, particularly for BPS meeting the Compact's reform targets, with its narrow focus. Critique of the Compact highlighted the partnership's premise of "jobs in exchange for school performance (Hahn & Lerman, 1985 as referenced by Hargroves, 1986, p. 20) and as an over simplistic program solution to a larger systems problem (Waddock, 1995). By targeting support to catalyze systemic change along a continuum, the BOA is able to invest in and impact priority educational spaces of a student's development. Thus, by the BOA design a Boston person would have support from their birth and development leading up to school, through the K-12 schooling experience, and would be prepared for college and career ready. This expansion demonstrates greater understanding of the complexity of education reform than Boston predecessors.

Secondly, the BOA core partners reflect a shift in membership. Particularly, the business community that led the Boston Compact is absent. The BOA is dominated by a largely philanthropic base. Looking historically, we can see this transition to philanthropic support was initiated with the Boston Plan for Excellence, as under the leadership of Ellen Guiney (1995-2011) in partnership with Superintendent Thomas Payzant (1995-2006), BPS was the recipient of $100 million from national and Massachusetts foundations such as Gates, Annenberg, Nellie Mae, and the Boston Foundation with BPE acting as the administrative agent (Annenberg & Aspen, 2006; Cronin, 2011). The BOA is an extension of this business to philanthropy shift that began with the BPE and more deeply reflects this evolution.

Some of this shift can be attributed to activities in the business community. In some instances, large and significant Boston businesses have merged or been acquired by corporations with headquarters in other geographical places. Bank of Boston, who pledged the initial gift to the Boston Plan for Excellence and encouraged others to do the same (Cronin, 1989; Dooley, 1994) is one example. Bank of Boston would merge with Fleet Financial Group in 1999 and subsequently be acquired in 2004 by Bank of America, whose headquarters are in Charlotte, North Carolina. Consequently, civic responsibility by the businesses may have been lost. Or perhaps, for-profit businesses have decided that it was easier to just contribute to philanthropies and then let them do the civic engagement work (rather than trying to do it themselves). Finally, a seemingly ever-increasing push for short-term profitability in the corporate world may have led to less direct investment in philanthropic activities, despite the public good will it may bring. In short, the private business community is largely absent in the Opportunity Agenda with the exception of

Related Beal Companies. Charities and foundations are driving the “private” component of this public-private partnership.

Another explanation for this shift may be attributed to trends in philanthropy during the formation of the BOA, in which the partnership appears to be in line. Grantmakers in Education, the largest network of education grantmakers, noted that nationally funders were choosing to collaborate in order to leverage their investment particularly across sectors, invest frequently in various spaces along an educational continuum rather than in “siloed” funding efforts, and engage in processes of convening, participating in governance and analyzing data (Grantmakers in Education, 2012). Designed as both a cross-sector and public-private partnership, the BOA is a demonstration of multiple partners leveraging their resources to affect greater impact. Additionally, similar to the respondents in the same study, the BOA has undertaken the responsibility of the planning process, assembling stakeholders, governance, and data collection and evaluation with all activities aligned with its cradle to career network of initiatives. However, it is less clear as to whether the Opportunity Agenda is at the forefront of these trends or simply following them.

Replications and Extensions

By using a historic lens, some parallels between the Boston Compacts and the BOA also surfaced. These consistencies include extensive planning, adaptability, membership from the public sector, and one shared critique. Though these are common threads, active and intentional replication of previous partnership was not explicitly cited during this research.

However, as noted about the parochial nature of the educational ecosystem in Boston, some influence was assumed.

The original Boston Compact developed out of emerging relationships between the business and education communities (Waddock & Post, 1991). It also resulted from extensive planning and hard work over several years and included the development of *The Boston Compact: An Operational Plan for Expanded Partnerships with the Boston Public Schools* to guide the intended work. The coordination of multiple stakeholders to determine a common agenda, initiatives and metrics parallels the process of BOA partnership formation by its core partners. Both instances illustrated and affirmed the need for careful and extensive planning to form strong public-private partnerships.

Once planned and launched, both the Boston Compact (1982) and the BOA (20210), demonstrated a willingness and ability to adapt. The Boston Compact progression consisted of additional editions signed into agreement in 1989, 1996, and 2000 and represented added stakeholders and evolving priority agreements. Similarly, the BOA's trajectory has included the addition of new members, new initiatives, and updated metrics.

Additionally, while the previous section noted changes in core partner membership, the Boston Public Schools as well as higher education representatives, represent some commonalities. This speaks to logic as the focus of these partnerships is education. Signers of Boston Compact IV such as Mayor Menino and the Superintendent of BPS became partners in the original BOA (although it was a new superintendent, Dr. Carol Johnson)[34], while other BOA partners such as the Boston Foundation and Nellie Mae have links through their support of the Boston Plan for Excellence. Furthermore, with origins in the Boston Compacts, higher education support continues with the Success Boston initiative as well as the Boston Private Industry Council. Finally, both partnerships have demonstrated staying power as the original Boston Compact existed in excess of 18 years and the Boston Opportunity Agenda has a history of 11 years and counting.

Lastly, a common criticism observed in public-private partnerships in Boston has been of elitism. In critiquing the Boston Compact model, Kantor (1991) pointed out the limitation to the voices of those with less power that results when reform stems from the privileged of the city, "...because it assumes that civic elites have no vested interests of their own but the public good...it tends to imply that elite involvement will necessarily lead to better schools…" (p. 244). This concern resurfaced in 2006 as Superintendent Thomas Pazyant transitioned from his role. Regarding the cadre of support from political, business and university leaders cultivated through the BPE, citizens and grass root organizations voiced concerns about the disparity in access to decision-making between these leaders and themselves (Aspen & Annenberg, 2006). Though this research did not encounter any criticism of elitism from the BOA, the roster of core partners is absent of parent groups or grass root coalitions, that might offer counter to such a critique.

[34] As of 2014, a new mayor, Martin Walsh had been elected and superintendent, Dr. Carol Johnson had retired and been replaced with an interim superintendent, John McDonough who was followed by 3 additional superintendents as of this writing.

Who's Not a Member? A Consideration of Other Membership

The BOA represents one model for membership in educational public-private partnerships and as noted in chapter four, there have been some updates to its initial membership. Largely, the shifts have expanded the membership as the core partners have experienced low turnover. Here, I consider what additional members might be considered for the BOA and the implications for their inclusion. A few prominent representatives that are not presently members of the BOA are parent organizations, the Boston Teachers Union (BTU), members of the for-profit business community, the larger university community, and health[35] and social service organizations.

To be clear, at present, the BOA does have some connections to these member possibilities. Three strategies have brought these connections: (1) convening community meetings on initiatives (parents organizations); (2) partnering with the Boston Public Schools (who partners with the teachers union), foundations (often connected to, funded by or the result of private business), and college and universities (Umass-Boston and BHCC as representatives of higher ed on the BOA board); and (3) co-opting existing private-partnerships (Thrive in Five's coalition of early child health providers and Success Boston coordination with 37 local higher education institutions).

However, these groups are not formal members at this point. This stands in contrast to other partnerships seen in the literature both historically in Boston as well as the national landscape with a few identified here: parent organizations (the Boston Compact); the teachers

[35] The Boston Children's Hospital joined in 2021 as a core partner

union (Boston Compact Two-Four, the LA Compact); members of the for-profit business community (LA Compact); larger university community (UChicago Consortium on Chicago School Research[36]) and health and social services (Boston Compact). These other partnerships provide alternative membership models to consider.

The inclusion of these members logically brings ramifications and a brief discussion is shared in this section. A consistent historic critique of Boston partnerships, among other places nationally, is the lack of grass root representation and community voices in these private partnerships. To education scholars such as Thomas Wolff and others (Wolff, 2016; Wolff et al, 2016), this lack of engagement with the community most affected by the issue of education reform is a problem. These omissions are reflective of a top down partnership structure in which the central leaders set the agenda for the target populations. Particularly in the years of formation, the original initiatives were decided solely by the core partners as part of an internal vetting process.

As the partnership matured, there is evidence of strong efforts to collect thoughts from the community on individual initiatives, the Birth to Eight Collaborative, Opportunity Youth, and High School Redesign to name some instances. Though, the level of consideration and power given to these community members beyond "their voice being heard" is undetermined. Given the early process for the initial initiatives was a largely

[36] An explanation of their mission is here: the UChicago Consortium conducts research of high technical quality that informs and assesses policy and practice in the Chicago Public Schools (CPS). A full description is on their website. https://consortium.uchicago.edu/

internal process, this record of community voice is uneven across the totality of initiatives of the BOA.

The exclusion of the teachers union has significance for partnership. It limits the partnership's ability to affect change within the Boston Public School system. If we look more closely at the initiatives of the BOA, they are located in spaces outside of the BPS purview (especially at the onset of BOA). Thrive in Five focused on children before they reached kindergarten, the Summer Learning Project targeted students during their vacation time, Opportunity Youth focused on students who had either dropped out of high school without a diploma or students who earned a diploma but were no longer connected to education, and Success Boston supported students as they transition out of the Boston Public School systems. All of these initiatives were in educational spaces that were significant but tangential to BPS operations.

These initiatives also operate outside of the authority of the Boston Teachers Union. As such, the inclusion of the BTU wouldn't appear to hinder these efforts due to contract commitments. The BTU would have more authority with regards to initiatives located inside the school walls during the school days. Most recently though, in March 2019, the BOA announced a goal to have 66% of the 2025 high school graduating class be well prepared for post secondary success. The goal emerged from a John Hopkins study (Balfanz & Byrnes, 2019) commissioned by the BOA found that a series of predictive indicators of college success developed by the Opportunity Agenda partnership are strong predictors of college and career success. These predictors include: a 2.7 GPA during high school, 94% attendance rate, and completed rigorous courses, defined as MassCore plus an Advanced Placement, Dual Enrollment or International Baccalaureate experience; along with supplemental data to suggest that interning or volunteering had a positive effect on post secondary success as well (Balfanz & Byrnes, 2019)[37]. For BPS, a student meeting two of the three academic criteria, as well as having completed an internship or volunteer experience, are interpreted as "ready". This recent development is included as it may demonstrate a foray into previously less chartered territory for the Opportunity Agenda-more direct involvement with academics within the school system. Excluding the "anywhere learning" data representing internships and volunteering, the three principal indicators are achieved through the efforts within the school walls.

Support for these efforts may show a shift from networking and coordination of service providers (Thrive in Five and Success Boston) and scaled programming leading to systems change (Summer Learning), both Opportunity Agenda initiative hallmarks. These shifts necessitate BOA adopting alternative strategies such as advocacy and influence at the policy level as well as continuing system support for data collection and management.

An additional potential representative group omitted from the partnership is the business community. Their inclusion could be fashioned in a few different ways. Specific corporate partners could be engaged like in the Boston Plan of Excellence (Dooley, 1994). Boston, as a national center for health, technology and financial industries, has many strong

[37] To note, these findings correlated only with students enrolled in four year colleges or universities. The same indicators were not shown to indicate success at the two year college level.

companies from which to draw. Other representations could reflect more general business affiliations such as the Chamber of Commerce, seen in the original Boston Compacts (A History of the Boston Compact: 1982-1999) or the more recent LA Compact (LA Compact Partnership Agreement, 2014, 2017). Finally, representation in this area could be expanded to corporate foundations or family foundations resulting from successful business enterprises with the Liberty Mutual, Fidelity and Shah (Wayfair) Foundations to name a few. In all of these scenarios, businesses could add the industry perspective on students being "ready" as well as assisting the PIC develop a pipeline for the internships highlighted in the John Hopkins study.

As stated, this trend away from corporate partners may reflect the relocation of corporate headquarters or simply that the business sector isn't interested in providing direct support to the Boston schools in exchange for a job program as described during the original Boston Compacts (A History of the Boston Compact: 1982-199l Farrar & Cipollone, 1988; Spring, 1987). Their absence is telling as statistics tell us that Boston is reliant on imported talent[38] (not educated here in Boston) to fill higher skill employment positions, particularly in the technology, financial, and consulting industries to name a selection (Enwemeka, Fujiwara & Khalid, 2017), so a vested interest is implied.

Additional potential partners are from areas with some existing membership in the BOA, albeit a sole representative: colleges and universities, and health and social services.

---

[38] In 2017. Massachusetts ranked 9th among states requesting HB-1 visa, a program that permits businesses to hire foreign skilled workers

Both of these areas could be expanded. In addition to Umass-Boston, a larger consortium of colleges and universities could act as a research arm of the partnership to further strengthen its use of data and inform its policy. While the BOA and the current partners individually typically commission evaluation of the various Opportunity initiatives, this would provide a more robust academic evaluation source. Inclusion in the actual BOA partnership may belie true independent evaluation so detail of this arrangement would need to be negotiated. Finally, the addition of the Boston Children's Hospital as a partner in 2021 suggests the partnership's recognition of educational reform as a meta-problem described by Siegel (2010) in his discussion of the "domain focus" theory of motivation. Further extension of partnership to other social service partners would allow the BOA the possibility of offering more "wrap around" support for the students in Boston. Catholic Charities, Debbie Rambo's remarks "One of the things that I talk about from time to time is you can't just fix what's happening in the classroom. What's in the classroom definitely requires some attention, but what's happening outside the classroom has an impact on what's going on inside the classroom. Please let's not forget that", (D. Rambo, personal communication, May 2016) indicated support for that kind of approach.

Summary of Partner Motivations to Join the BOA

The BOA now (2021) comprises 16 core partners. The partners that participated in the interviews for the data collection process expressed a variety of reasons for joining the partnership. Of the eight theories used as a framework - transaction costs economics, resource dependency, strategic choice, stakeholder theory, organizational learning, institutional theory, domain focus and mandate (Barringer & Harrison, 2000; Cantor, 1990, and Siegel, 2010), this study found the presence of all theories with the exception of mandate. There were, of course, a variety of the motivations discovered for partners joining and in several instances, the partners described multiple motivations for partnering. In those instances, no effort was made by the research to determine which motivation was "more important". A summary of the frequency (number of partners observed) for each motivational theory is in table 11.

Table 11
Observations of Motivational Theories

Motivational Theory	Number of Observations
Transaction Cost Economics	6
Resource Dependency	4
Strategic Choice	9
Stakeholder Theory	6
Organizational Learning	1
Institutional Theory	3
Domain Focus	4
Mandate	0

Note. This data represents the 16 interviews conducted during data collection.

Discussion of Partner Motivations to Join the BOA

The findings of this research confirm the literature describing why organizations are motivated to enter inter-organizational partnerships (Barringer & Harrison, 2000; Cantor, 1990, and Siegel, 2010). Through an amalgamation of the motivational theories presented by these authors, the motivations to join the BOA partnership were examined. These theories had previously been applied to university partnerships (Siegel, 2010); high school and community college partnerships (Leonard, 2013); and job training and economic development initiatives (Cantor, 1990). This study utilized the theories to examine the motivations of members of the BOA, an educational public-private partnership. Of the eight theories used as a framework, this study found the presence of all theories absent of mandate. Additionally, no other reason for motivation outside of this framework was noted. This study further exhibited the usefulness of these theories for understanding the impetus to partner.

For the partners from the world of philanthropy, transaction cost economics and strategic choice were common responses. Transaction cost economics describes a motivation for a partner to do its work more efficiently. Strategic choice, a broad theory, emphasizes an organization's decisions to identify and attach to partnerships that will bring greater leverage and impact to the institution's work. Resource dependency theory, rooted in the need for resources that a partner might possess, reflects a similar sentiment to strategic choice, but is less opportunistic and was also noted by partners. All of these motivational theories reflect partners thinking about their individual interests. Who can help us do our work more efficiently? Or for greater impact?

These motivations influenced the structure and decision making of the BOA. There is no pooled funding to invest collaboratively. Organizations are able to choose to invest in specific opportunities individually as it fits to the priorities of the CEO and the mission of the partner organization, although efforts to distribute funds across the spectrum were made. The funding depth and breadth depended on the particular partner interests and capacities. “When you look at the pipeline, the United Way really came into the Boston Opportunity Agenda work with a focus on those early years. Every person, every group at the table is thinking of the whole pipeline but comes in, obviously, with kind of a specific area of expertise. Although we fund along the entire pipeline, The Thrive in Five partnership was kind of the key piece that we were there for” (K. Ausiello, personal communication, April 2016). These motivations might also explain why the BOA lacks public commitments by the partners that spells out explicitly who is responsible for doing what. For the BOA, there is a commitment by the partners to sit at a table, discuss issues and opportunities, and to create a shared vision but there isn’t a public commitment to act on them necessarily.

While expressed by partners, a larger presence of the motivational theories of domain focus and learning theory might foster an increased focus on the collective. Domain focus, with motivation to partner due to an issue being identified as a “meta-problem” is emblematic of an “this is a big challenge that we need to tackle together” attitude. Learning theory connects the motivation to partner as a learning opportunity from other partners. The theory recognizes a partnership’s ability to improve its learning capacity over time and demonstrates a “we can learn from each and grow together” attitude. This learning process fosters partnership vitality and limits stagnation, which can lead to partnership irrelevance. Both of these motivational theories place greater emphasis on the collective. With motivation centered on a greater emphasis on the collective, truly collaborative investment through pooled partner money and public partner commitments might be more desirable for the BOA.

Summary of Partner Perceptions of Strengths and Challenges

Due to the complexity and longevity of the BOA partnership, an array of interactions and processes formed the partnership experiences. Amidst this, partners perceived various strengths and challenges of the partnership. While each success and challenge was presented individually in chapter four, it is noted that these successes often were intertwined. For example, when the partners developed the pipeline initiatives, appropriate staffing, dedication and trust were a part of this process. Additionally, challenges (funding, priorities, sustainment) of the partnership often overlapped.

Strengths cited by partners centered on two foci: the development, effectiveness and visibility of individual initiatives, with Thrive in Five, Summer Learning, Opportunity Youth and Success Boston highlighted; and a collection of human capital characteristics such as dedication, appropriate staffing, and trust.

Through the development of initiatives by the BOA via two principal strategies: co-option, where existing partnerships were folded into the pipeline and creation, where the partners developed and coordinated resources to construct a new initiative along the pipeline, the BOA has been able to bring increased visibility to both the work of the initiative as well as the underlying issues. For instance, Thrive in Five (early education), Summer Learning Academies (summer learning loss), and Success Boston (college completion) all benefited from the increase of awareness in the Boston educational community of the work and its importance. Ultimately, the results of this support was quantitatively demonstrated by BOA partnership metrics.

The BOA has also benefited from the strength and quality of the people involved in its planning and operation. With more than two years of planning and now more than a decade of operation, dedication to the partnership was paramount. Working group meetings chaired by partner organizations, regular monthly leadership meetings for the CEOs of the core partners, community forums, just to name a few, required BOA partners to make this partnership a priority. It also meant that the partnership needed to be strategic structurally so that the appropriate people were at the meetings to make the necessary decisions efficiently. The decision to fund and hire an effective executive director to coalesce the individual partners and keep the partnership moving forward proved to be critical. Through this mutual commitment of the partners members, trust was fostered through the completion of the work itself.

Like all partnerships, challenges were encountered by the BOA partners. Largely centered on funding, they reflected tests from both the internal and external environments. Internally, the tension between the interest and responsibility of the individual member and that of the partnership as a whole needed to be navigated in terms of determining the course of action for the partnership but also the connected funding commitment. Without explicit commitments and no pooled funding, the alignment of values and priorities within the group needed to be negotiated. Externally, general economic conditions affect partner funding capacity as well as BPS fiscal calendars and foundation grant cycles not aligning in concert. Finally, while strong communication was noted within the partnership through Kristin McSwain, the executive director, and Ray Hammond, board chair, the various BOA initiatives remained siloed and thus cross initiative communication was weakened. The communication between the early education initiative (Thrive in Five, now Birth to Eight Collaborative) and "staying on track for graduation" initiative (Summer Learning) relied largely on informal communication resulting from the intertwined nature of the educational ecosystem in Boston. Thus, internal learning opportunities were not realized.

Discussion of Partner Perceptions of Strengths and Challenges

Described in the BOA literature, collective action is a guiding strategy for driving change on the educational pipeline. As explained, "We convene diverse stakeholders to establish and tackle big goals, forming networks that share data and best practices and engage in continuous improvement" (Boston Opportunity Agenda Report Card, 2019). Membership in the Strive Together Network, along with the statement about collective action, suggests that the partnership utilizes the model of collective impact. As offered by Kania and Kramer (2011), successful collective impact involves the existence of five conditions: a common agenda, a backbone support organization, shared measurement systems, mutually reinforcing activities, and continuous communication. In this section, I analyze the successes and challenges revealed by this research in comparison to the conditions of success for the collective impact model presented in the literature.

Common Agenda

In the collective impact model, a shared understanding of both the problem and the primary goal is a condition of success partnerships. The BOA partners described a process of determining a shared agenda through their development work with DCA Consulting Group prior to the launch. Unity on the focus of education reform and agreement on the cradle to career pipeline to reach that goal was achieved very early in the process. The group then used two principal strategies of co-option and creation to establish the major initiatives along the educational pipeline. This common “agenda’ is publicly displayed on their outward communication - website and report cards.

Like all partnerships, healthy disagreements between partners in the BOA were described. Greeley recounted the partners determining direction in the K-12 space during planning,

> Though they agreed on all sorts of big things, but they had different areas of emphasis, on what they most wanted to do, and so, for example, Pat Brandes at the Barr Foundation really felt that the critical thing to do was to enhance the capacity of the school system itself, so do things that would strengthen its capacity to continually improve, and Nick Donohue from Nellie Mae, who came into this partnership shortly after we came on board, felt it's really important to push the existing systems. To find out what innovations work, and really push hard to have those innovations brought into the mix. I'd say Paul Grogan felt, we've got to create very clear plans, and those plans have to be oriented towards specific results, and we've got to then relentlessly pursue them and refine our work as we go forward.
>
> (S. Greeley, personal communication, June 2015)

Noting disagreements still existing in partnerships that they studied, this discord was acknowledged by Kania and Kramer (2011), “Every participant need not agree with every other participant on all dimensions of the problem” (p. 39). Most critical was that the partners shared the same goal and the BOA developed that.

Backbone Organization

The establishment of a backbone organization, separate from the partners, with dedicated staff to plan, convene, and support the partnership was critical. Absence of this component was frequently cited for partnership failure (Kania & Kramer, 2011). Coupled with a shared agenda, these two conditions (of the five initially posited) were found in later studies to be the most vital (Spark Policy Institute & ORS Impact, 2018) as they laid a foundation for the other conditions. The Boston Opportunity experience confirms this condition, though it offered a variance to the model. It has consistently had a structure, if not a backbone organization, to act as the connective tissue between partners. Initially, the facilitation fell to DCA Consultant’s Steve and Beth Greeley and their efforts aided the partnership to get off the ground. The value of having “someone who wakes up everyday thinking about the partnership” (R. Hammond, personal communication, April 2015) was recognized and the agreement to fund an executive director position was solidified. While the capacity of non-profits to access this type of funding has been acknowledged (Hanleybrown, Kania & Kramer, 2012) and resulted in criticism of collective impact (Wolff, 2016), this commitment to share funding responsibility by the BOA partners meant that the executive director wouldn't need to fundraise for their own salary, which is the scenario in some other partnerships. In 2011, Kristin McSwain was hired.

Well regarded by the partners and appreciative of her efforts, McSwain crafts meeting agendas, manages the partner relationships, maintains communication between formal meetings, and is the public representation of the BOA. Unlike the partners who wear "two hats", the executive director of the BOA works to support everyone with only the partnership's interests in place. McSwain's role confirms the ideal backbone organization criteria, espoused by Kania and Kramer (2011), to "embody the principles of adaptive leadership: the ability to focus people's attention and create a sense of urgency, the skill to apply pressure to stakeholders without overwhelming them, the competence to frame issues in a way that presents opportunities as well as difficulties, and the strength to mediate conflict among stakeholders" (p. 40).

As noted, the member participants agreed to share the funding of the position. While this study did not reveal the specific amounts, intimations from participants indicated that not all partners fund the position and that some partners contribute more than others. One question to consider as the result: does this arrangement confer any power within the partnership, even unrecognized, to the foundations that directly contribute?

Shared Measurement

Shared measurement connects to the creation of the other condition for success, a shared agenda, as created goals lack significance if there isn't a shared way to measure them. As part of the formation of the BOA, the members at executive level agreed upon metrics and benchmarks across the pipeline. “There's a sense of, from the group, of accountability to these performance metrics that they internalized. That was one of the guiding principles that they established early on” (S. Greeley, personal communication, June 2015). This commitment to shared measurement trickles down to the community partner level of the BOA initiatives. Thus, this research confirms the collective impact literature about shared measurement as a condition of successful partnership.

Mutually Exclusive Activities

Mutually exclusive activities, in accordance to collective impact success, means that the partners involved work collectively. It doesn’t “require the partners to work on the same thing” (Kania & Kramer, 2011, p. 40). BOA partners reported self-selecting into pipeline working groups that best fit their interest and capability. This confirms the literature about mutually exclusive activities. With the Opportunity Agenda’s relatively low accountability structure (no explicit commitment to responsibilities), partners participate according to their own foundation’s vision, expertise and appetite for the issue at the various parts of the education pipeline. As discussed earlier in the chapter, if membership in the partnership was expanded to include partners from health, housing, substance abuse, etc. then a more robust catalog of mutually reinforcing activities would be achieved. As presently constructed, with the exception of Boston Children’s Hospital, the mutually exclusive activities engaged in by core partners are strictly centered in education and the support from more “wrap around” services for students has not been realized.

Continuous Communication

Kania and Kramer (2011) observed regular, consistent in person meetings by the CEOs of the partners in successful collective impact efforts. This consistency built for the partners involved a common vocabulary, appreciation of each other's motives, and trust that their individual interests would be served. The Boston Opportunity Agenda confirms this condition as their meeting schedule (once per month with CEO, not designees, attending) parallels that described by the authors. Additionally, the trust developed over time from these meetings was something Greeley noted as one of DCA's intentions in facilitating the planning of the BOA. We wanted the CEOs "to have the opportunity to actually get to know each other through the work, and by doing so it should become apparent over time, that these different areas of emphasis, and why they have merit....and what you are doing is integrating each other's ideas centered around the perspectives" (S. Greeley, personal communication, June 2015). Mike Middleton sensed this familiarity six years into the partnership, "I feel that goodwill among the principals (CEOs) who sit there, although it also speaks to a partnership where different people are going to take leads over time, so you have a partnership where folks don't mind stepping back or stepping forward as initiatives roll out. I think that it takes good will that people can work together and know they'll get to everybody's priorities over time" (M. Middleton, personal communication, May 2016).

Additionally, consistent with the literature, continuous internal communication was supported by the activities of the backbone organization (Stachowiak & Gase, 2018), in this case Executive Director McSwain and Board Chair Reverend Ray Hammond .

A natural connection to this continuous communication and shared measurement conditions of collective impact are data and accountability, which are centered in the BOA's central strategies. "Accurate and timely data is both a call to action and an accountability mechanism. We are committed to regularly reporting progress on key metrics and encouraging the use of common definitions, metrics and benchmarks across the pipeline to track Boston as it works toward achieving its education goals" (BOA Report Card, 2019). While not an explicit condition of successful collective impact partnerships, this strategy's close connection warranted inclusion here.

Data and Public Accountability

As noted in the BOA literature, data and public accountability is one of their strategies for guiding change. There is ample evidence of faithful adherence to this guiding strategy by the partners. Annually since its inception, the BOA has published a report card with all of the progress in the established key metrics across the education pipeline. As discussed elsewhere, the data set has expanded since the partnership's origins to include student data from charter and Catholic schools in Boston with the existing Boston Public School data. The release of these report cards correspond with public announcements and forums hosted by the BOA. Additionally, the partnership has a website with public access to all partnership report cards, relevant reports and articles, as well as episodic monthly newsletters. There is also a news and events section that links to articles about the Opportunity Agenda in local printed publications. Finally, there are invitations to public forums for various BOA initiatives like the Birth to Eight Collaborative, High School

Redesign, and Opportunity Youth along with mailing lists. The data is clearly available. To note, one source of evaluative data not included is from external sources. As example, a university research department could offer additional perspective to the partnership.

Less prevalent is the availability of the process and operations of the partnership. These same sources of information (annual report cards, partnership website, reports, monthly newsletters) omit enlightening information such as meeting minutes, partnership governance agreements, commitments by member organizations, etc. Without the availability of this kind of documentation, full transparency from the partnership is not achieved. This characteristic supports a lower accountability structure for the BOA's members. Externally, there is no evidence of the specific commitments from each member in terms of the partnership as a whole or the specific initiatives supporting the areas of the pipeline.

Though public, questions also exist concerning who is accessing this data. Most of the materials seemed to be geared towards the nonprofit and philanthropic communities. While Boston Public Schools is a member of the partnership, it seems unlikely that families of students would be familiar with the partnership or its progress. As a teacher in BPS, I was unfamiliar with the partnership as part of my professional duties. Widely familiar at higher levels of the education ecosystem in Boston, the BOA remains clandestine and unfamiliar to the students and families to which the partnership efforts are often geared.

Does it matter? It could be argued that as long as the students and families receive the benefit of the services created by the partnership, it doesn't matter if the BOA is recognized as the driver. Describing the tension of wanting to market the partnership without overshadowing the constituents, providers and even the issues, Reverend Hammond remarked, "As I say, you want people to know it exists. The question is how widely known should it be? I would love for people to know the report card exists. How critical is it for them to know that that report card was put together by the Boston Opportunity Agenda? That's still an open question" (R. Hammond, personal communication, April 2015).

However, to education scholars such as Thomas Wolff and others (Wolff, 2016; Wolff et al, 2016), this lack of engagement with the community most affected by the issue of education reform is an issue. These omissions are reflective of a top down partnership structure in which the central leaders set the agenda for the target populations. Particularly in the years of formation, the original initiatives were decided by the core partners as part of an internal vetting process.

As the partnership matured, there is evidence of strong efforts to collect thoughts from the community on individual initiatives, the Birth to Eight Collaborative, Opportunity Youth, and High School Redesign to name some instances. Given the early process for the initial initiatives, this record is uneven across the totality of initiatives of the BOA. Additionally, the level of consideration and power given to these community members beyond "their voice being heard" is undetermined. In fact, there is no specifically cited example where the community was adopted as a full core partner so to speak. This absence of grassroots organizations is consistent with criticism of collective impact (Wolff, 2016; Wolff et. al, 2016) and questions concerning the sustainability of change brought on without community empowerment exist (Wolff, 2016). Additionally, newly added BOA value statements in 2020 centered on the pursuit of equity, adoption of anti-racist policy, and strengthening communities reflects an awareness by the partnership of the gravitas of the issue (“Who We Are”, n.d.).

From this researcher’s perspective, some of the literature regarding criticism of collective impact and the advocacy for community empowerment seems overly simplified. Engaging and sharing power with the communities most affected by issues are undeniably principles to be lauded. Harnessing the talent and ideas that no doubt exists in these communities is wise.

However, there are real constraints to this process that lie in the philanthropic community. As argued in the literature, foundations have fiduciary responsibilities to support initiatives consistent with their mission and bylaws (Carson, 2012). They can not simply provide funding for a partnership, or backbone organization for a partnership, without knowing what solutions the partnership will work towards. Furthermore, the involvement of the community members should not mean the devolvement of foundations. These foundations bring their own experience with funding, grant processes, partnership, as well as solutions in the field, to the table and should not be dismissed. Critics push to improve collective impact’s missing principles around equity and inclusion of the community are commendable but in my opinion, don’t legitimize a laissez-faire approach by foundation and other institutional leaders. That all being said, partnership with community organizers would have brought a wider swath of voices and expertise to BOA.

Summary of Influence on Boston Public Schools

From the origins of an educational partnership to improve education that started without the Boston Public Schools as a partner, this case study found evidence of mutual influence in this partnership. Through regular superintendent participation in the CEO meetings, collaborative work on partnership initiative creation, and continuous communication particularly via the executive director, Kristin McSwain, trusting relationships and thus the ability to influence was developed. This influence, through exchange of ideas, was initiated at various points from both sides. As partners, some limitations to this influence were described particularly due to the structure. The BOA is an external agent to BPS, whereas BPS is an internal member of the BOA. Thus, the partnership structure that includes BPS as a member means accepting the agenda of the public schools to some degree, even if they run contrary to the partnership. By highlighting issues, commissioning research, and providing financial support, the BOA exerts influence on the Boston Public Schools. The Summer Learning Project (now the city's "5th Quarter of Learning") demonstrates that as the partnership progresses, the influence that stemmed from the BOA can be institutionalized by the Boston Public Schools.

Discussion of Influence on Boston Public Schools

The research of this case study addressed the question about the nature of influence of the BOA on the Boston Public Schools. In this section, I use a historical lens to first highlight some examples of influence of some previous educational partnerships in Boston, specifically, the Boston Compact and the Boston Plan for Excellence.

The BOA and the Boston Public Schools have increasing influence over each other as the partnership has strengthened. Before turning to discussion of the BOA, I utilize a historical lens to examine in what ways the previous Boston public-private educational partnerships had influence on the Boston Public School district. As noted, the BOA does not appear to have a direct connection to these previous partnerships. However, an understanding of some examples of historic partnership influence in the city will provide context to the discussion of current BOA influence.

A Historical Comparison

Previous partnerships in the city, specifically the Boston Compact and the Boston Plan for Excellence, represented public-private partnerships with the Boston Public Schools. As such, these partnerships exerted influence in some manner. The Boston Compact of 1982, especially at the onset, was most prominently a partnership between the Boston Public Schools and the business community. With the promise of jobs for BPS graduates, the business community leveraged this promise to push for improved student academic performance demonstrated by test scores (Reading and Math increase by 5%) and attendance (5% increase). A parallel push can be seen for increased academic performance in the Boston Opportunity Report Cards with benchmarks across the pipeline such as 3rd grade reading proficiency, MCAS performance, and four-year high school graduation rates. It appears that a significant difference lies in the nature of the “push”. While the Boston Compact represented an exchange, “you do your part and we will do ours” that resulted in dissatisfaction from the business community when BPS failed to meet its academic measures (Rothman, 1988), the language of the BOA is of partnership and academic goals are described as "our goals" and progress is framed as, "how are we doing". The report card messaging reinforces the notion of collective work and ownership of the results.

The Boston Plan for Excellence (launched in 1984) also used its partnership to exert influence on BPS. Broadly described as a push for classroom innovation, BPE provided grants for innovative classroom practices and developed the BPS Essentials of Whole School Improvement, which focused on the use of coaching to improve classroom instruction. In 2002, these essentials were adopted district wide by the district and termed the Collaborative Coaching and Learning Model. Also in 2002, BPE focused energy and influence on BPS through the creation of the teacher preparation program, Boston Teacher Residency (BTR). The push for classroom innovations is an area in which the BOA has not focused explicitly, though the BPE enjoys financial support from BOA partner members such Barr Foundation, Boston Foundation, and the EOS Foundation.

Later editions of the Boston Compact reflect other influences on the Boston Public schools through support for school based management and more school choice (Compact Two); the creation of pilot schools and support for whole school change (Compact Three). Furthermore, the business community's influence on the mayor's office resulted in the switch from an elected school committee to an appointed committee when Governor Bill Weld signed the change into law in July of 1991 (Gonsalves & Leonard, 2007) and thus resulted in influence on the Boston Public Schools.

Turning towards the current private-public partnership of the BOA and the Boston Public Schools, the research shows that they have increasing influence over each other as the partnership has strengthened. Though this influence was found to have some limitations due to partnership structure and design. Discussing here further, while the Boston Public Schools is a member of the BOA, ultimately the partnership is an external agent in the system. This position has ramifications.

For instance, an external partner like the BOA determined its own agenda. However, absent a sentiment of members to truly revolutionize or "overthrow" the public school system (and then it would be hard to partner with them), then it behooves the external partner to work with the leaders of the public school system to affect change. It makes sense for BOA to see in what ways the district will "row with them" and to take opportunities to influence them when they are not. It seems clear that part of the Opportunity Agenda intention is to reform BPS or help BPS reform itself. As the primary educator of Boston residents (70% of all school aged children), efforts to meet and the evaluation of data metrics as prescribed along the pipeline starts with BPS. Though as noted, the BOA annual report card data now reflects the charter and catholic schools.

Another limitation to the growth of the BOA and district relationship (and the implied influence) resulted from district leadership turnover. Since inception in 2011, Boston Public Schools have undergone five superintendent changes. The BOA, launched during the last years of Dr. Carol Johnson's stint has survived the subsequent superintendency terms of interim John McDonough (2012-2015), Dr. Thomas Chang (2015-2018), interim Laura

Perille (2018-2019), and recently selected Dr. Brenda Cassellius (2019-present). This churn has impacted the partnership's work. Nationally, grantmakers expressed a similar woe, noting that "a turnover of leadership results in diminishing effectiveness and impact and funders report looking for alternative methods to achieve impact (Grantmakers in Education, 2012).

At minimum, it brought pause to the communication between the partnership and the school district in the time period while a new superintendency was established. This pause may have halted momentum on initiatives being developed or being continued within the partnership. In research by Bellwethers Education Partners commissioned by the Boston Foundation (2019) [39], Bonnie O'Keefe, Melissa Steel King, and Chad Aldeman reported that, "Several interviewees (group included a sample of stakeholders representing different perspectives in the Boston education sector, including: the BPS central office, the mayor's office, the school committee, school leaders, community and parent advocates, local foundations, and teacher advocates) noted that confidence in BPS leadership among community groups has diminished as high-profile initiatives in which they had invested time and energy foundered through implementation and leadership changes. Interviewees recommended the next superintendent work to rebuild external trust, and quickly clarify which previous initiatives and reforms they plan to continue" (pg. 24).

An external partner, like the BOA, needs to adopt a wait and see approach while the incoming superintendent's agenda becomes clearer to determine if there is still alignment in vision within the partnership. This can have consequences. Depending on the timing of the

[39] Full report is here. https://www.tbf.org/-/media/tbf/reports-and-covers/2019/bellwether_boston-analysis-20190226.pdf?la=en

transition, funding opportunities could be squandered as the period for the budget preparation and allocation of funding could be missed or the fiscal year comes to a close. On the other side, the foundation's funding cycle calendar and deadlines can be missed during this self-imposed moratorium.

While the partnership's purpose of supporting the education from birth to career encompasses more than the age ranges of typical primary and secondary students, those K-12 students still represent and are the focus of a large swath of the pipeline's initiatives. Furthermore, while the BOA tracks the data on all students of school age through a compilation and comparison of data from the Boston Public Schools in addition to the Boston Charter Schools and parochial schools of Boston, traditional public schools are still where approximately 70% of school aged children are educated (BPS at a Glance, 2020-2021).

This revolving door at the superintendent position, though somewhat overstated as a national phenomena, is still common in urban districts (Broad Center, 2018). Boston's lack of continuity in leadership has implications for its students of course, but also brings challenges for its partners. With each subsequent superintendent, new policies, initiatives and priorities were ushered in as the school leader established themselves in the position. As such, public-private partnerships like the BOA should consider this context both during their creation and operation.

Implications for Current and Potential Public-Private Partnerships

Urban education reform achieved through systemic change is not achieved easily or quickly. Developing a common understanding, with common vocabulary; shared measurable goals; and the trust in the commitment to mutually reinforcing activities all take time. The nature of education reform and the complexity of a multi-stakeholder public-private partnership requires a sustained commitment from the organizations involved. Thus, partnerships should anticipate this reality and make choices for partnership structures and processes accordingly.

Particularly, any public-private partnership supporting a cradle to career educational spectrum for students needs to be committed to the long term by design. A partnership with supportive initiatives along the pipeline would need to be in place for upwards of 25 years in order for a student to be the beneficiary of the full complement of the partnership's efforts. Additionally, the support needs to be coordinated and seamless so that students' gains achieved at one point in their educational development aren't subsequently lost in later years as a result of the lack of cohesion.

The research findings of this historic case study of the BOA revealed structures and processes that have implications for both current public-private educational partnerships, as well as communities considering the formation of an educational public-private partnership. Ultimately, the creation of partnership is a series of choices by the partner members. The following are considerations for public-private educational partnerships to support sustainment, engagement, and effectiveness.

Choices to Consider: Supporting Sustainment, Engagement, and Effectiveness

Plan Methodically

Consistent with the previous public-private partnership in the city, the Boston Compact, the BOA utilized a multi-year planning and development process before the public launch in 2010. This span afforded time not only to thoughtfully develop the initiatives, structures, processes, and benchmarks of the partnership but also the needed space to develop the intra partnership and interpersonal relationships between members. While partnership members may (or may not) be familiar with one another, a deeper connection with one another through shared purpose and work is often incremental and thus takes time. An extended planning period can also flesh out partner priorities so that a common understanding of the issue can be arrived upon and a common agenda can be determined.

Identify the Work in Place

During the planning process, an examination of the educational ecosystem reveals the extent to which the issue is being addressed and to what success. The BOA teaches that a partnership need not create all facets of the work from scratch. Through an inventory of the Boston educational landscape, the BOA partnership recognized successful pre-existing public-private partnerships in Thrive in Five and Success Boston that aligned with their "cradle to career" pipeline vision. Through co-option, the BOA fulfilled two initiatives (of four) to support identified high leverage spaces on an educational spectrum. The fact that Thrive in Five and Success Boston had relationships with BOA members (Boston Foundation, United Way, City of Boston, among others) made their introduction to the BOA even more seamless. This strategy brought efficiency to the BOA creation as the group dismissed the opportunity to "recreate the wheel". Many communities have terrific resources in existence and private-partnerships would be wise to leverage them when possible.

Consider if a Threshold of Agreement is Enough

Collective impact's prescription for a partnership to develop a true common agenda, defined by shared understanding of the problem and a shared primary goal, (Kania & Kramer, 2011) fails to acknowledge the difficulty in this process with diverse stakeholders and the potential for partnership to get "stuck" before they even get started. The BOA in its creation and operation exemplifies how a private-partnership can be guided by a threshold of agreement, wherein partnerships can move forward with less than total agreement, particularly on components that are not core issues of the common agenda (Milward, B., Cooper, K. & Shumate, M., 2016).

Truly mutual agreement on complex problems such as education reform is difficult. This isn't to suggest that a common agenda isn't present for the BOA partnership. The evidence revealed that the partnership has one agenda in its "cradle to career" approach and agreed upon high leverage initiatives to support students, but conflicting opinions on the best course of action surfaced at different points.

There is a threshold of agreement with the agenda but no mechanism for holding any individual member organization to any explicit public commitment. While this may have a negative connotation, it allows the member organizations to participate according to their appetite (interest and capacity) in the various initiatives and with a broad pipeline, all partners can find some connection. Rather than burying individual organization agendas, this flexibility acknowledges the responsibility of each partner institution to maintain fidelity (and in some cases fiduciary responsibility) to their mission and diminishes the creation of toxic hidden agendas (Milward, B., Cooper, K. & Shumate, M., 2016). Ultimately, the lower accountability structure allows people to stay at the table and remain in partnership even if there are activities that don't precisely align with their mission. It doesn't force them to choose one over the other and perhaps dismantle the partnership. This then allows the partnership to sustain its existence and with time, the trusting relationships to develop a more complete common vision and make real change.

Take Inventory of Partner Motivations from the Onset

Motivation to join public-private partnerships are varied. Though with the exception of mandate, the forced participation in partnering, all of the motivations reviewed in this research are voluntary and to some degree self-serving. The collective impact model espouses the need for a common agenda but absent is the understanding of why the partner is at the table. This understanding of motivation has a connection to the development of a common agenda and the tension between individual members and whole partnership agendas described above. Partnerships with this awareness can shape itself in response to which partners and what percentage are motivated for economic reasons (transaction cost economics, resource dependency) compared to other behavioral motivations (strategic choice, stakeholder, domain focus, institutional, learning theory). Whatever the motivations, they influence the process and structures of partnership and so an explicit communication of individual partner motivations is beneficial.   Thus, partnership decisions can reflect these motivations and increase partner satisfaction and partnership sustainability.

Dedicate a Staff (Person) to the Partnership

This study affirms the need for an individual, such as an executive director or a small staff, to manage the work and serve as the connective tissue of the partnership. If possible, within budget constraints, the funding for the staff should be shared. Shared funding fosters the collaborative spirit and shared responsibility of the partnership; promotes the idea that the partnership staff "works for all of us" and acknowledges that individual partners typically don't have the capacity to maintain the daily operational activities necessary for success.

The BOA offers an effective modification to the backbone organization" prescribed in the collective impact model. With only a sole executive director[40]rather than a fully staffed separate non-profit organization, the partnership recognized the need for someone to be dedicated solely to the partnership. The other member leaders (the CEOs) had simply too much on their plates to attend to all the support operations of an effective working public-private partnership, though the BOA did borrow capacity from themselves to staff the working groups and augment the efforts of the executive director.

There has been a critique of the backbone organization's role in the collective impact model (Varda, 2018) which argued that a backbone organization assuming responsibility for the activities of the partnership actually undermines the collective spirit and sharing vital to an effective partnership. The model used by BOA with a small staff serving the collective

---

[40] The partnership added two additional staff members in 2019.

partnership rather than a fully staffed backbone organization addresses this criticism. This neutrality, the BOA team, "works" for all members and maintains a balance of power between the individual partners that might be eradicated if the backbone organization was held by an official partner. However in the case of the BOA, the reality of the myriad of responsibilities held by partner CEOs necessitates a backbone organization and absent one, the partnership would suffer from neglect.

Furthermore, as a small team, albeit effective, there are limits to their capacity to "run" the partnership. These limitations necessitate member involvement with research, determining meeting agendas, providing space for meetings and forums, among other operations. This balance achieves both objectives for structures for a sustained partnership: an individual or small team focused exclusively on the work and acts as a connective tissue for the partnership so momentum is preserved while still maintaining the collective spirit and engagement by partnership members through their needed contributions. Future public-private partnerships would be wise to consider this structure. Someone dedicated to the work is critical. Quite simply, too many partnerships fail without at least one person who is solely dedicated to the work.

Manage Leadership Transitions

Urban superintendency churn significantly impacts partnership's work and partnerships should consider and prepare for this turnover during their design. In Boston, the Opportunity Agenda has partnered with five superintendents during its roughly 10 years of existence. Each transition brought pause to the work and partner frustration that investments in initiatives were discontinued. While this level of turnover is extreme, a public-private partnership with intentions to be long standing (and as noted earlier, a partnership focusing on “birth to career” should realize multiple decades of existence for full implementation) needs to consider and prepare for leadership transition. At a certain point, partnerships like the BOA should become part of the unavoidable educational fabric in the city. School districts (the public part of the partnership) can help ease transitions by introducing the partnership up front to candidates, asking them how they will work in partnership as part of the interview process, and establishing the assumption or even requirement that the incoming superintendent will work in partnership. Institutionalizing the partnership in this way increases effectiveness as the moratoriums typical during district leadership transitions are mitigated. The “private” portion of the partnership, in this case the philanthropic organizations, seem to have less turnover and can be relied on to provide a more consistent membership through these public leadership transitions.

Prepare to Adapt

A successful “birth to career” partnership is predicated on long term partnership sustainment. Launched in 2010, the BOA was anchored by four central initiatives in high leverage educational spaces: a strong educational foundation (Thrive in Five), on track to graduate (Summer Learning Project) and high school/college completion (Success Boston), and post-secondary attainment (Adult Opportunity Network). As described in chapter four, these initiatives were either refined and expanded (Summer Learning Project and Success Boston) or updated and replaced (Thrive in Five became Birth to Eight Collaborative; Adult

Opportunity Network became Opportunity Youth). Despite strong planning and preparation, shifting educational and national trends, self-evaluation and emerging opportunities prompted the BOA to make changes to the original initiatives. This demonstrates an evolution and other partnerships should expect to do the same.

Determine What Needs to be Explicit

A common agenda with shared benchmarks informs a partnership of its goals. However, explicit commitments by individual partners can be absent. While the BOA partners selected initiatives that they would be responsible for chairing in the planning stages and other partnership component commitments, other partnership processes such as entering/exiting the partnership and funding levels of the partnership were not codified. Partnerships should consider articles of partnership, in which the process for entering and exiting the partnership are spelled out; public commitments to action by partners; governance guidelines for how decisions are made; and data access (who produces it, who sees it, when, etc). By explicitly describing these expectations, partner members know what to expect and what is expected of them. While the benefits of loose coupling are noted above, the consideration of some of these structures, more characterized in tight coupling partnerships, can support the partnership as it weathers the leadership transitions described above as well as the changing external environment during the years of its existence.

Invest in Systemic Change

Throughout their history, the BOA has invested in "catalytic solutions to increase the scale and scope of change" (BOA Annual Report Card, 2019). As more than one

Opportunity Agenda Board member stated, “we don’t simply want to fund programs” particularly those in isolation. Creating better educational outcomes for a select group is too narrow in scope for this scale of partnership.

This is a smart strategy. The BOA as a thought partner and provocateur of the Boston Public School system is an efficient use of their resources. The Summer Learning Project illustrated an induction and incubation of new ideas to the system. The Summer Learning Project was a co-construction of a new and fresh look at programming to address summer learning loss. The traditional summer school of remediation was reexamined and a recognition of the city as a classroom was imagined. Subsequently, the Summer Learning Project has become institutionalized and has morphed into the Boston Public School district’s “5th Quarter of Learning”. When partnerships are strategic about their investment, they can achieve a system change and reallocate its energy on other emerging opportunities. Though, working in partnership with the public schools brings limitations to a certain extent, as the “private” component of the partnership is de facto adopting at least parts of the agenda of the school district.

Recognize the Power Held by the Group

The historic criticism of elitism in public-private partnership in Boston has been documented and is warranted. For public-private partnerships with urban school districts, the need to actively and intentionally work towards dismantling the systemic barriers of marginalized student populations is paramount. The BOA, formed in the era of No Child Left Behind (NCLB), provides support to the students of Boston Public Schools. As noted earlier, the student demographics of the district includes a large representation of marginalized populations including: 85% BIPOC, 21% students with disabilities (have an IEP), 48% first language is not English, and 73% considered economically disadvantaged (Boston Public Schools at a Glance Fact Sheet, 2020-21). Only in the most recent years of the partnership has the BOA stated the publicly explicit design to create a just education system through the dismantling of barriers. Future private-public partnerships should center this intentionality from the onset. Partnership engagement first originates from partner membership. Partnerships should think deeply about creating broad partnerships particularly with inclusion and representation from the community they intend to serve. Then share real power.

Make Learning Intentional

An analysis of participating subject's responses in the interviews using a spectrum of motivational theories to determine the rationale for joining the BOA partnership revealed an under-representation of learning theory. Learning did occur though and sources for this partnership specifically include the expertise of each individual member themselves and the collective partnership as a whole (internal sources) as well as other public-private partnerships; and promising partnership practices, including the Strive Together Network (external). Furthermore, learning can be both informal and occur as happenstance as well as formally structured and intentional. The BOA seems to have a higher prevalence of informal learning within the partnership and greater intentional learning from external sources.

Members have a great deal of knowledge and experience with education individually. Logically, at the BOA board level, monthly meetings attended by the CEO and other key staff fostered a fruitful environment to share this expertise and thus informal learning from each other occurs. Additionally, informal exchanges amongst the individuals working on various initiatives occurs, as there is overlap between persons working and leading the various Opportunity Agenda initiatives as discussed earlier. Finally, as an 11 year partnership with consistent membership, these individuals can rely on institutional memory for learning.

All of these components can contribute to learning. Though, these occasions of learning are by-products of the partnership operations and lack the intentionality of organizational learning. There is evidence of a considerable amount of time and money being invested in research to inform the BOA, such as partnership in other cities (Strive Partnership and Strive Together Network in particular), about effective benchmarks for educational development, and other current educational practices and theories. However, this intentional learning is from external sources.

The partnership doesn't appear to be conducive to formal or deliberate organizational learning from within the partnership (internal) either in practice or structure. A partnership with organizational learning as a more primary motivation for partnership would exhibit different characteristics. For instance, as part of partnership practice, the learning could be demonstrated by evaluation of the partnership itself. As noted by Wolff et al. (2016), learning can come from within the partnership through evaluation in the form of self-assessment of process and dynamics within the partnership. The BOA could measure how the partnership is growing, improving, and other internal metrics such as satisfaction. This study didn't discover this formal evaluation; rather, members reported more general episodic check-ins amongst participants designed to determine if "this partnership was something people wanted to continue with". For the BOA, a formalized process that fostered learning would provide opportunity for improvement for the individual members as well as the partnership as a whole. This growth might also help with member retention (though that has not been an issue thus far) and engagement.

In addition to practice, the structure of the BOA also contributes to the lack of clear formal organizational learning. While individual initiatives reported robust evaluation of programs (the Summer Learning Project and the Wallace Foundation, as an example) and held specific forums for data analysis and best practice among their community partners, the siloed nature of the main initiatives of the Opportunity Agenda along the pipeline hinders learning within the partnership. Essentially, this stems from the lack of horizontal communication between the initiatives particularly at the community partner. For example, the Summer Learning initiative partners and convenors wouldn't be in dialogue in a formal structure with partners and convenors for Birth to Eight Collaborative (formerly Thrive in Five) unless there was overlap in staffing or informal encounters as noted above.

Overall, the evidence suggests that learning about the process of partnership is not a high priority of the BOA despite its potential for increased effectiveness and partner engagement. Rather, the learning seems to exist more prominently through research of national partnerships, practices and trends. Additionally, informal processes for learning from each other within the partnership exist and due to increased trust due to the number of years of partnership, are likely becoming more beneficial.

Limitations and Suggestions for Future Research

This study has provided clarity to the formation of the BOA by answering four research questions. The research described how the partnership formed and evolved; the motivations for partners to join; the partners perceptions of strengths and challenges of the partnership; and the influence of the partnership on the Boston Public Schools. Even with this knowledge, there are still answers to be learned about the BOA specifically and more generally of educational public-private partnerships.

Limitations of the Research Methodology

While the findings of this study have clear benefits to both the public and private institutions that may consider partnership, there are some limitations. As noted in the methodology, limitations are inherent to qualitative research such as this case study. First, there were some limitations based on the data type. Qualitative research is based on four types of data: documents, interviews, direct observation, and participation (CITE). This study only utilized documents and interviews. While appropriate for the study, direct observation of BOA meetings would have offered the opportunity to witness firsthand some activities and processes that were described by recall during the interviews as well as the body language and tone of the partner members.

In addition, some of these limitations can be attributed to the data collection process. While attempts were made to interview all CEOs of the member organizations, that was not achieved. In some instances, I interviewed other senior leaders of the organization (but not the actual CEO) and in others, there was no interview of the institution's leadership at all. Worth noting is that the superintendent of the Boston Public Schools was not interviewed.

The interviews that I did conduct also were heavily weighted towards individuals who were involved in the same Opportunity Agenda initiative: The Summer Learning Project (now Summer Learning Academies). As such, their experiences may not be indicative of the experiences of other participants in other initiatives. This reliance on participants in the Summer Learning Project may have resulted in my use of a "snowballing" technique in which interview subjects were asked to recommend additional candidates to interview. The suggestions were of people most familiar with them in the partnership and with siloed initiatives, the people most familiar were people from the same initiative.

Finally, interview data was collected during a time period between 2015-2016 and thus opinions and perceptions may have shifted as the partnership developed in recent years. A longitudinal study with follow up interviews would mitigate this limitation. Additionally, while strong efforts were made to review all public documents connected to the BOA, this research did not include internal partnership documents such as meeting minutes, emails, etc. These choices described limited the research findings of this study.

Limitations of the Theoretical Lenses

For my analysis, I examined the data through a historic lens, the collective impact model, as well as a continuum of motivational theories for inter-organizational partnership. These lenses were beneficial as they provided more understanding of both the historic context of the formation of the Boston Opportunity Agenda, the structures and processes of partnership, as well as the motivations for members to participate. Essentially, these lenses helped answer the questions of how and why the BOA partnership came to be. By understanding the nature of the previous partnerships in the city, information was gleaned regarding the formation of the BOA including what actors were involved and the existing relationships between members, as well as the partnerships and initiatives that were enfolded into the BOA.

The motivational framework explained why the participating organizations joined the partnership. The various motivations for partnership were largely elicited during the interview phase of data collection. However, if the partner described multiple motivations, this study failed to establish a hierarchy of the expressed motivations. In essence, which motivation was most important was not determined. Furthermore, since each subject was only interviewed once, this study was unable to determine if these motivations changed over time in the partnership and if the motivations did indeed shift, what was the new motivation? Was the original motivation(s) replaced or was this an additional motivation? A longitudinal study with repeated interviews with the same subjects or equivalent representatives in an organization might reveal how motivations to partner shift over time and illuminate the reasons for the shifts. This type of study might also further inform the discussion of how and why partnerships are sustained. Finally, I looked at how these lenses intersected and influenced BOA's implementation of the collective impact model. Having a historical and motivational perspective enhanced my ability to study how and why BOA fits the collective impact idea. However, the collective impact model is in its infancy stage of evaluation and as such the true efficacy of the model is not fully understood (Gase & Stachowiak, 2018; Wolff, 2016).

Suggestions for Future Research

While this study brought to light the inner workings of a large-scale public-private partnership in the BOA, questions still remain about the nature of these partnerships. Primarily, this study hasn't fully answered the question if this partnership is greater than the sum of its parts. Essentially, is the BOA accomplishing more than the individual members could accomplish themselves? Answering this question more definitively would more effectively inform the cost-benefit analysis for communities considering partnership.

An additional area of study would be to examine public-private partnerships such as the Boston Opportunity Agenda with a social justice and critical theory lens. These lenses recognize the lack of neutrality in urban public school district spaces serving traditionally marginalized student populations (racially, linguistically, immigration status, among others) and could examine in which ways the partnerships are perpetuating this marginalization and what ways they are creating systemic change that empowers this student population.

Another area of exploration for these partnerships is the backbone organizations. The present literature discusses both the necessity (Kania & Kramer, 2011) and detriment (Varda, 2018) of these organizations. The BOA offers an alternative to reach the same goal of the backbone organizations as the BOA employed an executive director and small staff to serve as this function. As this study showed, the executive director was critical to partnership success. Thus, further research around this executive director role may be warranted. For example, are there unique qualities that support effective convening organization leaders (executive directors) in public-private partnerships?

Also this research examined partner motivations. Further research to determine which motivations to partner are predictive of high levels of partner sustainment, effectiveness and engagement would be enlightening. This understanding could be coupled with an examination of the life cycle of partnerships. While this particular study focused primarily on the time frame of formation and development (the early years) of the BOA, a natural extension would be to study the maturation and decline of a large-scale public private partnership. What are the factors that support maturation and what factors might accelerate the decline?

Finally, there are many unknowns regarding the world of philanthropic foundations and their involvement in education. There are many types of foundations. Research focusing on whether particular foundation types are more advantageous for public-private partnerships in education than others would be beneficial.

APPENDIX A

2019 BOSTON OPPORTUNITY PARTICIPANTS

Table A1
BOA Board Members: 2019

Board Member	Organization
Reverend Ray Hammond	Chair
Mayor Martin Walsh	City of Boston
Angel Roberson Daniels	Angell Foundation
Kathy Mears	Archdiocese of Boston
Jim Canales	Barr Foundation
Shannah Varon	Boston Collegiate Charter School
Paul S. Grogan	Boston Foundation
Laura Perille	Boston Public Schools
Debbie Rambo	Catholic Charities
Rahn Dorsey	City of Boston
Rabbi Marc Baker	Combined Jewish Philanthropies
Nick Donohue	Nellie Mae Foundation
Alex Cortez	New Profit, Inc.
Mike Durkin	United Way of Massachusetts Bay and Merrimack Valley
Joseph B. Berger	University of Massachusetts-Boston

Note. Information retrieved from Boston Opportunity Agenda Website July 10, 2019

Table A2.
Investors in BOA: 2019

Organization	**Organization**
Annie E. Casey Foundation	Robert & Myra Kraft Family Foundation
Aspen Opportunity Youth Incentive Fund	Liberty Mutual Foundation
Paul & Edith Babson Foundation	Marjorie L. and James M. Lober Fund
The Lloyd G Balfour Foundation	Lumina Foundation
Beal Companies, LLP	Massachusetts Department of Early Education and Care
Blue Cross Blue Shield	Massachusetts Department of Housing and Community Development
Boston Children's Hospital	W. K. Kellogg Foundation
Margaret A. Bush	Herman & Frieda L. Miller Foundation
Steven A. Caravello	The National Summer Learning Association
Center for the Study of Social Policy	Partners Healthcare
Deloitte LLP	Harold Whitworth Pierce Charitable Trust
Eastern Charitable Foundation	Pritzker Children's Initiative
Eos Foundation	Kazandjian Sargeant Fund
Jessie B. Cox Charitable Trust	Charles S. and Zena A. Scimeca Charitable Fund
Belden, Pamela and Andrew Daniels Opportunity Fund	Shultz Family Foundation
Frieze Family Foundation	Richard and Susan Smith Family Foundation
Hamilton Company Charitable Foundation	State Street
The Hayden Foundation	Matthew J. & Gilda F. Strazzula Foundation
Hildreth Stewart Fund	Strive Together Sunrise Fund
J.P. Morgan Chase Foundation	Sally Suttenfield Webb Fund
Nancy R. Karp	Verizon Foundation
Allan Kamer	The Wallace Foundation
Klarman Family Foundation	Charles A. Walsh, III.

Note. Info adapted from BOA Annual Report Card 2019

Table A3.
Community Partners for the BOA

Birth to Eight Collaborative: Strong Educational Foundation

Abt Associates • Action for Boston Community Development • American Academy of Pediatrics • Archdiocese of Boston • Barr Foundation • Black Philanthropy Fund at the Boston Foundation • Boston Children's Hospital • Boston Children's Museum • Boston Chinatown Neighborhood Center • Boston Community Capital • The Boston Foundation • Boston Medical Center • Boston Public Health Commission • Boston Public Library • Boston Public Schools • Boston Renaissance • Boston University • Boston's Higher Ground • Boys and Girls Clubs of Dorchester • Boys and Girls of Greater Boston's Brazelton Center • Bridge Boston • Bureau of Family Health and Nutrition • Catholic Charities • Center for the Study of Social Policy • Center on the Developing Child at Harvard • Charlestown Nursery School • Children's HealthWatch • City of Boston • City of Cambridge Dept. of Human Service Program • CitySprouts • Countdown to Kindergarten • Cradles to Crayons • Crispus-Attucks Children's Center • Department of Public Health • Department of Early Education and Care • East Boston Social Center • Efficacy Institute • Epiphany School • Families First • Family Nurturing Center of Massachusetts • Financial Empowerment Center-Dudley • First Teacher • Generations Incorporated • Girl Scouts • Head Start ABCD • Health Resources in Action • Hestia Fund • Horizons • Inquilinos Boricuas en Acción • Jumpstart for Young Children • Kennedy Center • KeySteps • Mass Department of Public Health • NAMI Massachusetts • Neighborhood Villages • New Profit • Nurtury • Paige Academy •

Phenomenal Moms • PPAL • Raising A Reader MA • ReadBoston • Room to Grow • Ropes & Gray • School Effectiveness and Inequality Initiative • Smarter Give • Smart From the Start (Smart) • Social Venture Partners Boston • South Boston Neighborhood House • South End Settlements • Sportsmen's Tennis and Enrichment Center • Strategies for Children • Tartt's Day Care Center • The Harold Whitworth Pierce Charitable Trust • The Home for Little Wanderers • Tufts Medical Center • Union Capital Boston • United South End Settlements • United Way Of Massachusetts Bay and Merrimack Valley • University of Massachusetts Boston • Vital Villages • Wellesley Center for Women and Children • West End House • Young People's Project and YMCA of Greater Boston.

Summer Learning Academies: On Track for Graduation Initiative

ACEDONE • Achieve • Alliance for Inclusion and Prevention • BELL (Building Educated Leaders for Life) • Benjamin Franklin Institute of Technology • Berklee College of Music • Bethel A.M.E. Church • Bird Street Community Center • Boston Area Health Education Center • Boston Arts Academy • The Boston Foundation • Boston Chinatown Neighborhood Center • Boston Day and Evening Academy • Boston Private Industry Council • Boston Public Schools • Boston Scores • Boston University • Boys & Girls Clubs of Greater Boston • Boston Plan for Excellence (BPE) • Breakthrough Greater Boston • Brigham and Women's Hospital • Burke High School • Calculus Project • Camp Harbor View • Community Music Center of Boston • Courageous Sailing • Crossroads Dearborn STEM Academy • DotHouse Health • Empow Studios • Freedom House • Generation Teach • Hale Reservation • Harlem Lacrosse • Harvard-Kent School • Haynes Early Education Center • Health Resources in

Action • The LEAH Project • Horizons at Dedham Country Day School • Imajine That • Inquilinos Boricuas en Acción (IBA) • Josiah Quincy Elementary School • Josiah Quincy Upper School • Leahy Holloran Community Center • Mass Audubon's Boston Nature Center • MassArt • Artward Bound• Neighborhood Network Center Inc. • North Bennet Street School • Northeastern University • Olmsted Center for Landscape Preservation • Phillips Brooks House Association • Sociedad Latina • Sportsmen's Tennis and Enrichment Center • The Steppingstone Foundation • St. Stephen's Youth Programs • Thompson Island Outward Bound • Tierney Learning Center • University of Massachusetts Boston • UMass Boston Institute for Learning and Teaching • VietAid • Wentworth Institute of Technology • Wheelock College • World Ocean School • YMCA of Greater Boston and Zoo New England.

Building Pathways for Opportunity Youth: Boston Opportunity Youth Collaborative

Action for Boston Community Development • Allston Brighton Community Development Corporation • American Student Assistance • America's Promise Alliance • Angell Foundation • Asian American Civic Association • The Lloyd G. Balfour Foundation • Barr Foundation • Benjamin Franklin Institute of Technology • Boston Asian Youth Essential Service • Bunker Hill Community College • Bird Street Community Center • Black Ministerial Alliance • Boston After School and Beyond • Boston Link • Boston Cares • Boston Centers for Youth and Families • Boston Day and Evening • The Boston Foundation • Boston Mayor's Office • Boston Public Schools • Boston STRIVE • Boston Youth Service Network • B-PEACE for Jorge • Boys and Girls Clubs of Boston • Bridge over Troubled Waters • Brigham & Women's Hospital • City of Boston • City Year • College Bound

Dorchester • College & Career Readiness Massachusetts • Committee for Public Counsel Services • Commonwealth Corporation • Community Work Services • Community Call • Diamond Educators Mentoring Inc. • Dorchester Bay Economic Development Corporation • Dorchester Youth Collaborative • Dudley Street Neighborhood Initiative • East Boston Neighborhood Health Center • ESAC-GED Plus • Executive Office of Health and Human Services • Freedom House • Future Chefs • Health Resources in Action • Higher Ground • Hull Lifesaving Museum • The Hyams Foundation • Hyde Square Task Force • Inquilinos Boricuas en Acción • Innercity Weightlifting • Justice Resource Institute • Jewish Vocational Service (JVS) • JFYNetWorks • KeySteps • Liberty Mutual Foundation • Madison Park Development Corporation • Massachusetts Business Alliance for Education • Massachusetts Communities Action Network (MCAN) • Massachusetts Department of Youth Services • Mayor's Office of Workforce Development • More Than Words • Multicultural Dropout Outreach Collaborative • New England Center for Arts and Technology (NECAT) • New England Community Services • New Horizons Boston CLC • New Profit • Northeastern University • NorthStar Learning Centers • Notre Dame Education Center • OneGoal Massachusetts • Ostiguy High School • Partnerships Advancing Communities Together (PACT) • Robert F. Kennedy Children's Action Corps • Roca Inc. • Roxbury Community College • Roxbury Youthworks • RoxMAPP • SkillWorks • Richard and Susan Smith Family Foundation • Sociedad Latina • State Street Corporation • Teen Empowerment • Trinity Boston Foundation • United Way of Massachusetts Bay & Merrimack Valley • Urban College of Boston • Whole Foods • X-Cel Education • Year Up • Youth Hub • Youth Options

Unlimited • Youth on Board • Youth Voice Project • YouthBuild Boston • YouthBuild Just A Start and Youth Options Unlimited Boston.

Note. Info adapted from BOA Annual Report Card 2019

APPENDIX B

INTERVIEW QUESTIONS

Prior to Creation of BOA

1. How did you get involved in the Boston Opportunity Agenda?
2. What was the context that led to the agreement to create the BOA?
3. What prompted the need for the Boston Opportunity Agenda?
4. Who were the "movers and shakers" behind the creation of the partnership? Were they at the announcement or did they just work behind the scenes? What part did they play after the formation? Who did the heavy lifting in developing the BOA? Who does the work afterwards?
5. What was the process leading up to the announcement of the BOA?
    a. How often were you meeting?
    b. Where did you meet?
    c. Who was in attendance?
    d. How was the agenda/goals for BOA established?
    e. How were the accountability measures established?
6. How did you feel about the process leading up to the formation?
7. How did you feel at the announcement of the BOA looking forward?

Post Formation

1) Can you describe your involvement in the Boston Opportunity Agenda (after the formal announcement)?
2) How is the process for the partnership (meeting times, communication, chain of command, strategy, vision, etc)?
    a. How often do you meet?
    b. Where do you meet?
    c. Who is typically in attendance?
    d. How is the agenda/goals for BOA established?
    e. How are the accountability measures established?
3) Describe what you see as strengths of the partnership?
4) Describe what you see as challenges of the partnership
5) How would you characterize the Agenda's impact/effectiveness? In your area? Generally?
6) How would you describe your experience being part of the Boston Opportunity Agenda?
7) What is the future plan for the partnership? What areas are there for growth?

Current Status

1) Please describe your current role professionally.
2) How did you get into your current role?
3) Do you have anyone that you would recommend that you feel might be someone to talk to about the Boston Opportunity Agenda?

APPENDIX C

PARTICIPANT CONSENT FORM

University of Massachusetts Boston
College of Education and Human Development
100 Morrissey Boulevard
Boston MA 02125-3393

Consent Form for Adults: The Boston Opportunity Agenda

Principal Investigator: Timothy Lavin

Introduction and Contact Information
You are being asked to participate in a dissertation research project that is investigating the history of the Boston Opportunity Agenda being conducted by Timothy M. Lavin, a doctoral candidate at the University of Massachusetts - Boston, Leadership in Urban Schools program.

Please read this form and feel free to ask questions. If you have any questions about this research study, you may contact the researcher, Timothy Lavin via telephone at 617.833.3874 or via email at tlavin2@bostonpublicschools.org or lavin.tim@gmail.com.

This research is being conducted as part of the requirements for a Doctorate in Education (Ed.D.) under the supervision of John (Jack) Leonard, Ed.D., Associate Professor of Leadership in Education, University of Massachusetts-Boston. You may contact Dr. Leonard at the above address, via telephone at 617.287.4026, or via email at Jack.Leonard@umb.edu.

Description of the Project:
The purpose of this research investigation is to document the history of the Boston Opportunity Agenda. Participation in this study will take place from November 2014 until September 2016. If you decide to participate in this study, you will be asked to answer some questions regarding the partnership in one or more personal interviews. Each interview will last no longer than ninety minutes.

Risks or Discomforts:

This research poses minimal risk for participants. The primary risk associated with this study is the emergence of negative or distressful feelings during the interview. You may speak with Tim Lavin to discuss any distress or other issues related to study participation. If you wish to discuss concerns with a counselor instead, you are encouraged to contact the Chair of my department at the University of Massachusetts in Boston, Dr. Wenfan Yan, who will direct you to appropriate counseling services (617-287-7601 or WenFan.Yan@umb.edu).

Confidentiality and Anonymity:
Due to the close working nature of the participants of the Boston Opportunity Agenda partnership, I **cannot** promise confidentiality in regards to your participation. However, you will be offered the opportunity to review the transcription for accuracy; ask for certain subjects or responses be "off the record"; or request that you not be identified directly for certain responses.

Voluntary Participation:
The decision whether or not to take part in this research study is voluntary. There are no monetary incentives. If you do decide to take part in this study, you may terminate participation at any time without consequence. If you wish to terminate participation, you should contact Timothy Lavin or the supervisor (Dr. Jack Leonard (see contact information above).

Rights:
You have the right to ask questions about this research before you sign this form and at any time during the study. You can reach Jack Leonard at the contact information provided at the top of this letter. If you have any questions or concerns about your rights as a research participant, please contact a representative of the Institutional Review Board (IRB), at the University of Massachusetts, Boston, which oversees research involving human participants. The Institutional Review Board may be reached at the following address: IRB, Quinn Administration Building-2-080, University of Massachusetts Boston, 100 Morrissey Boulevard, Boston, MA 02125-3393. You can also contact the Board by telephone or e-mail at (617) 287-5370 or at human.subjects@umb.edu.

Signatures
I HAVE READ THE CONSENT FORM. MY QUESTIONS HAVE BEEN ANSWERED. MY SIGNATURE ON THIS FORM INDICATES THAT I CONSENT TO PARTICIPATE IN THIS STUDY. I ALSO CERTIFY THAT I AM 18 YEARS OF AGE OR OLDER.)

______________________________ ____________

Signature of Participant Date

Typed/Printed Name of Participant

Signature of Researcher Date

APPENDIX D

TAPED CONSENT FORM

CONSENT TO AUDIOTAPING & TRANSCRIPTION

Project Title: **The History of the Boston Opportunity Agenda**

Principal Investigator: Timothy Lavin, doctoral candidate at the University of Massachusetts-Boston, Leadership in Urban Schools Program
.
This study involves the digital recording of your interview with the researcher. Only the researcher will be able to listen to the recordings.
The recordings will be transcribed by the researcher and erased once the transcriptions are checked for accuracy. Transcripts of your interview may be reproduced in whole or in part for use in presentations or written products that result from this study. Immediately following the interview, you will be given the opportunity to have the tape erased if you wish to withdraw your consent to taping or participation in this study.

By signing this form you are consenting to:

- ❑ having your interview taped;
- ❑ to having the tape transcribed;
- ❑ use of the written transcript in presentations and written products.

By checking the box in front of each item, you are consenting to participate in that procedure.

This consent for taping is effective until the following date: November 1, 2015. On or before that date, the tapes will be destroyed.

Participant's Signature ______________________________ Date______________

REFERENCES

A History of the Boston Compact: 1982-1999. Retrieved December 5, 2011 from http://www.bostonpic.org/sites/default/files/resources/History.pdf

About (n.d.). Success Boston. Retrieved July 16, 2021, from https://www.successboston.org/about

An Overview of the Boston Compact: 1982-2010. Retrieved June 17, 2014 from www.la**compact**.org/downloads/**boston-compact-overview**.pdf

Annenberg Institute for School Reform at Brown University & The Aspen Institute Education and Society Program (2006, March). *Strong foundation, evolving challenges: A case study to support leadership transition in the Boston Public Schools.* Washington DC: Author.

Annie Casey Foundation (2010). *Early Warning! Why Learning to Read by the End of 3rd Grade Matters*. Baltimore, MD: Leila Feister. Retrieved from https://assets.aecf.org/m/resourcedoc/AECF-Early_Warning_Full_Report-2010.pdf

Baker, L. M. (1994). *The politics of collaboration: How an educational partnership works*. Paper presented at the American Educational Research Association, New Orleans, LA.

Balfanz, R. & Byrnes, V. (2019, March). College, career, and life readiness. A look at high school indicators of post secondary outcomes in Boston. The Boston Foundation. https://files.eric.ed.gov/fulltext/ED596471.pdf

Barringer, B. R., & Harrison, J. S. (2000). Walking a tightrope: Creating value through interorganizational relationships. *Journal of Management*, 26(3), 367-403.

Barr Foundation (2018). *Education Overview*. https://barrfdn-prod.s3.amazonaws.com/documents/222/attachments/Barr_Education_Overview_2018Jun4.pdf?1531934759

Barr Foundation (2018). Return of organization exempt from tax [Form 990]. Retrieved from https://pdf.guidestar.org/PDF_Images/2018/046/579/2018-046579815-17237477-F.pdf?_gl=1*950ysj*_ga*NjE4Nzc1MDYxLjE2MjU5NDYwODM.*_ga_0H865XH5JK*MTYyNTk1NTU4Ni4yLjEuMTYyNTk1NjkxNy4w*_ga_5W8PXYYGBX*MTYyNTk1NTU4Ni4yLjEuMTYyNTk1NjkxNy4w&_ga=2.127227469.1730049771.1625946083-618775061.1625946083

Boston After School and Beyond. (2019). Summer for all: Lessons from ten years of Boston summer learning. https://bostonbeyond.org/wp-content/uploads/2020/04/Summer-For-All-Lessons-Learned-Report-1.pdf

Boston's College, Career, and Life Readiness Definition (2017, October). [PowerPoint Slides]. https://www.bostonopportunityagenda.org/-/media/boa/boa-ccr-presentation-oct(2).pdf

Boston Compact 2000. Retrieved November 29, 20111 from http://www.bostonpic.org/resources/boston-compact-2000

Boston Private Industry Council. An overview: History. Retrieved June 17, 2014 from http://www.bostonpic.org/about/history

Boston Public Schools. (2000). City's business, higher ed, non-profit leaders back Boston schools on MCAS, ed reform (Press release). Retrieved from http://www.bostonpublicschools.org/news/citys-business-higher-ed-non-profit-leaders-back-boston-schools-mcas-ed-reform

Boston Public Schools at a Glance Fact Sheet, 2018-19. Published by the BPS Communications Office. Revised November 2018. https://www.bostonpublicschools.org/cms/lib/MA01906464/Centricity/Domain/187/BPS%20at%20a%20Glance%2019_final.pdf

Boston Public Schools at a Glance Fact Sheet, 2020-21. Published by the BPS Communications Office. Revised November 2020. https://www.bostonpublicschools.org/cms/lib/MA01906464/Centricity/Domain/187/BPS%20at%20a%20Glance%202020-2021.pdf

Bowen, G. A. (2009). Document analysis as a qualitative research method. *Qualitative Research Journal*, 9 (2), p.27-40

Broad Center. (20118, May). *Hire expectations: Big district superintendents stay in their jobs longer than we think*. Retrieved from https://www.broadcenter.org/wp-content/uploads/2018/05/TheBroadCenter_HireExpectations_May2018.pdf

Brundage, A. (2008). *Going to the sources: A guide to historical research and writing* (4th ed.). Wheeling, Illinois: Harlan Davidson.

Buras, K. L. (2011, Summer). Race, charter schools, and conscious capitalism: On the spatial politics of whiteness as property (and the unconscionable assault on black New Orleans). *Harvard Educational Review*, 81(2), 296-330.

Business-Higher Education Forum. (2001, Winter). *Sharing responsibility: How leaders in business and higher education can improve America's schools*. Washington, DC: The Business-Higher Education Forum.

Cantor, J. A. (1990, Summer). Job training and economic development initiatives: A study of potential useful companions. *Educational evaluation and policy analysis*, 12(2), 121-138.

Carson, E. (2012, October 31). Rethinking collective impact. Huffington Post. https://www.huffpost.com/entry/rethinking-collective-imp_b_1847839

Cilley, P. & Gibbons, C. H., Jr. (Ed.). (1993). Venture capital for educators II. The Boston Plan for Excellence in the public schools.

City of Boston. (2008, March 12). *Mayor Menino, United Way, Community Partners Launch 'Thrive in Five'* [Press Release] http://www.thrivein5boston.org/pdf/TIF_Press_Release.pdf

Civic Committee of the Commercial Club of Chicago. (2004, June 24). Chicago business leaders applaud Renaissance 2010 – Pledge financial and technical support. Retrieved December 11, 2013 from http://www.civiccommittee.org/Media/Default/pdf/LEFT_BEHIND.pdf

Committee for Economic Development. (1985). *Investing in our children*. Washington, DC.

Creswell, J. W. (1994). *Research design: Qualitative and quantitative approaches*. Thousand Oaks: Sage Publications.

Cronin, J. (1989, July). *Corporate support for scholarships: A tale of two cities*.

Cronin, J. (1991, January). *Corporations and urban school reform: Lessons from Boston. Supporting leaders for tomorrow, occasion paper #12.*

Cronin, J. M. (2011). *Reforming Boston schools, 1930 to the present: Overcoming corruption and racial segregation*. New York: Palgrove Macmillan.

Dhillon, J. K. (2013). Senior Managers' Perspectives of Leading and Managing Effective, Sustainable and Successful Partnerships. *Educational Management Administration & Leadership*, *41*(6), 736–750. https://doi.org/10.1177/1741143213494186

Dooley, E. (1994). *The culture of possibility. The story of the Boston Plan for Excellence in the public schools: The first ten years*. Published by the Boston Plan of Excellence, Boston.

Dorsey, R., McCaskill, K. & Wilson, R. (2015, November 18). *High School Redesign* [PowerPoint Slides] Boston School Committee Meeting. https://www.boston.gov/sites/default/files/file/document_files/2018/07/high_school_redesign.pdf

Edwards, M. (2008). *Small change: Why business won't save the world*. San Francisco: Berrett-Koehler Publishers, Inc.

Employment and Training Administration. (1989, May). *Investments in tomorrow's workforce: Corporate partnerships for the education, training, and employment of disadvantage youth.* Washington, DC: National Youth Employment Coalition, New York, New York.

Enwemeka, Z., Fujiwara, D. & Khalid, A. (2017, March 16). What the data tells us about HB-1 visas in Mass. Retrieved from https://www.wbur.org/bostonomix/2017/03/16/h-1b-visa-explainer

Epstein, J. L. (1996). Advances in family, community, and school partnerships. *New Schools, New Communities*, 12(3), 5-13.

Epstein, J. L. (2001). *School, Family, and Community Partnerships: Preparing Educators and Improving Schools.* Boulder, CO: Westview.

Epstein, J. L., & Sanders, M. G. (2006). Prospects for change: Preparing educators for school, family, and community partnerships. *Peabody Journal of Education*, 81(2), 81-120.

Epstein, J. L., & Sheldon, S. B. (2002). Present and accounted for: Improving student attendance through family and community involvement. *Journal of Educational Research*, 95(5), 308-18.

Farrar, E. (1988, July). *The Boston Compact: A teaching case*. Washington, DC: Center for Policy Research in Education.

Farrar, E. & Cipollone, A. (1988, March). *The business community and school reform: The Boston Compact at five years*.

Fereday, J. & Muir-Cochrane, E. (2006). Demonstrating rigor using thematic analysis: A hybrid approach of inductive and deductive coding and theme development. *International Journal of Qualitative Methods*, 5 (1), Article 7. Retrieved July 15, 2014 from http://www.ualberta.ca/~iiqm/backissues/5_1/html/fereday.htm.

Friedman, D. H., Coonan, M, Douglass, A. & Carter, A. (2016). *Boston children Thrive in 5: Connecting families, building community, year 4 - Summative evaluation brief*. Center for Social Policy Publications. 84. http://scholarworks.umb.edu/csp_pubs/84

Gardner, W. (2010, December 17). Be wary of corporate inroads into education. Message posted to http://blogs.edweek.org/edweek.

Giroux, H. A. (2012, October 16). Can democratic education survive in a neoliberal society? Message posted to: http://truth-out.org/opinion/item/12126-can-democratic-education-survive-in-a-neoliberal-society.

Gold, E., Simon, E., Cucchiara, M., Mitchell, C. & Riffer, M. (2007, December). *A philadelphia story: Building civic capacity for school reform in a privatizing system*. Philadelphia: Research for Action.

Goncalves, L. & Leonard, J. (2007). *New hope for urban high schools*. Westport, CT: Praeger Publishers.

Grantmakers for Education (2012). *Benchmarking: Trends in education philanthropy*. Portland: Author.

Hahn, A & Lerman, R. (1985). *What works in youth employment policy*. Washington, DC: National Planning Association.

Hands, C. (2005). It's who you know "and" what you know: The process of creating partnerships between schools and communities. *School Community Journal*, 15(2), 63-84.

Hands, C. M. (2010). Why collaborate? The differing reasons for secondary school educators' establishment of school-community partnerships. *School Effectiveness and School Improvement*, 21(2), 189-207.

Hanleybrown, F., Kania, J. & Kramer, M. (2012, January 26). Channeling change: Making collective impact work. *Stanford Social Innovation Review*. Retrieved from https://ssir.org/articles/entry/channeling_change_making_collective_impact_work

Hargroves, J. S. (1983, October). *Boston public schools: Class of 1982. A follow up study. A Boston Compact*.

Hargroves, J. S. (1986). The Boston Compact: A community response to school dropouts. *Urban Review*, 18(3), 207-17.

Hargroves, J. S. (1987). The Boston Compact: Facing the challenge of school dropouts. *Education And Urban Society*, 19(3), 303-10.

Hartley, D. (1992, November). The compacts initiative: Values for money? *British Journal of Educational Studies*, 40(4), 321-334.

Hoy, W. K. & Miskel, C. G. (2008). *Educational administration: Theory, research, and practice* (8th ed.). New York: McGraw-Hill.

Hyslop, A. (2009). Fostering partnerships between education, business and industry. *Techniques: Connecting Education and Careers*, 84(5), 42-43.

Hyslop-Margison, E. J. & Margison, J. (1998). Corporate agendas and higher education: The Organization for Economic Cooperation and Development.

Impact area grantmaking (n.d.). The Boston Foundation. Retrieved July 16, 2021, https://www.tbf.org/nonprofits/funding-opportunities/impact-areas-grants-guidelines

Internal Revenue Service. (2017). *Form 990. Angell Foundation.* Retrieved from https://apps.irs.gov/pub/epostcard/cor/010789717_201806_990PF_2019090416617497.pdf

Internal Revenue Service. (2017). *Form 990. Barr Foundation.* Retrieved from https://apps.irs.gov/pub/epostcard/cor/046579815_201712_990PF_2019020416059848.pdf

Internal Revenue Service. (2017). *Form 990. Boston Foundation.* Retrieved from https://apps.irs.gov/pub/epostcard/cor/042104021_201706_990_2018052515346650.pdf

Internal Revenue Service. (2017). *Form 990. Nellie Mae Foundation.* Retrieved from https://apps.irs.gov/pub/epostcard/cor/042755323_201712_990_2019030616152217.pdf

Kania, J. & Kramer, M. (2011). Collective impact. *Stanford Social Innovation Review Journal,* Winter 2011.

Kantor, P. (1991, May) A Review of city schools and city politics: Institutions and leadership in Pittsburgh, Boston, and St. Louis. *Annals of the American Academy of Political and Social Science*, Vol. 575, 243-244.

Kerchner, C. (2010, March 16). The LA Compact: A dollop of hope for our schools. Message posted to: http://www.huffingtonpost.com/charles-kerchner/the-la-compact-a-dollop-o_b_499668.html.

Kolberg, W. H. (1987, November). Employment, the private sector, and at risk-youth. *Annals of the American Academy of Political and Social Science*, Volume 494, 94-100.

LA Compact Agreement 2014. Retrieved from https://issuu.com/laareachamber/docs/compactfulldoc2014_final-1

LA Compact Agreement 2017. Retrieved from https://d3n8a8pro7vhmx.cloudfront.net/unitela/pages/3157/attachments/original/1504637086/Compact_2017_Agreement_Complete_Aug2017.pdf?1504637086

Leonard, J. (2013). Negotiated issues in an early college partnership: Description and understanding through interorganizational theory. *Current issues in Education*, 16(3). Retrieved from http://cie.asu.edu/ojs/index.php/cieatasu/article/view/1058.

Lipman, P. & Haines, N. (2007). From accountability to privatization and African American exclusion: Chicago's "Renaissance 2010". *Educational Policy*, 21(3), 471-502. doi: 10.1177/0895904806297734

Litwak, E. & Hylton, L. F. (1962). Interorganizational analysis; A hypothesis on coordination agencies. *Administrative Science Quarterly*, 6, 395-420.

Loconto, M. (2019, April 22). Letter to the Boston School Committee. Superintendent finalists public interview outline. https://www.bostonpublicschools.org/cms/lib/MA01906464/Centricity/Domain/438/Sup%20Search%20Update%20Finalist%20Interview%20Panels%204-10-19FINALUPDATED.pdf

Lumina foundation designates 17 cities as talent hubs. (2017, September 23). Lumina Foundation. https://www.luminafoundation.org/news-and-views/lumina-foundation-designates-17-cities-as-talent-hubs/

MacDowell, M. A. (1989, October). Partnerships: Getting a return on the investment. *Educational Leadership*, 47(2), 8-11.

Male, E. (2019, April 19). *Helping students get ready for what's next in Boston*. Retrieved from https://www.strivetogether.org/insights/helping-students-get-ready-for-whats-next-in-boston/

Marshall, C. & Rossman, G. B. (2006). *Designing qualitative research* (4th ed.). Thousand Oaks: Sage Publications.

McDowell, W. H. (2002). *Historical research: A guide*. London: Longman Press.

Merriam, S. B. (1998). *Qualitative research and case study applications in education*. San Francisco: Jossey-Bass Publishers.

Milward, B., Cooper, K.R. & Shumate, M. (2016, Summer). Who says a common agenda is necessary for collective impact? *Nonprofit Quarterly*, 23(2), 41-43

Miron, G., Urschel, J. L., Mathis, W, J., & Tornquist, E. (2010). Schools without diversity: Education management organizations, charter schools and the demographic stratification of the american school system. Boulder and Tempe: Education and the Public Interest Center & Education Policy Research Unit. Retrieved December 15, 2013 from http://epicpolicy.org/publication/schools-without-diversity.

Molnar, A. & Garcia, D. R. (2005). *Empty calories: Commercializing activities in America's schools. The Eighth-Annual Report on Schoolhouse Commercialism Trends: 2004-2005.* Arizona State: Commercialism in Education Research Unit.

Mossberger, K. & Wolman, H. (2003, July-August). Policy transfer as a form of prospective policy evaluation: Challenges and recommendations. *Public Administration Review*, 63(4), 428-440.

Murray-Nettles, S. (1991, Autumn). Community involvement and disadvantaged students: A review. *Review of Educational Research*, 61(3), 379-406.

Nathan, R. P. (1989, January). Institutional change and the challenge of the underclass. Annals of the American Academy of Political and Social Science, Volume 501, 170-181.

National Alliance of Business. (1989). *The Compact Project: School-business partnerships for improving education.* Washington, DC: National Alliance of Business.

National Alliance of Business. (1991). *The Compact Project: The Final Report.* Washington, DC: National Alliance of Business.

O'Keefe, B., Steel King, M. & Alderman, C. (2019, February). An uneven path: Student achievement in Boston public schools 2007-2017. Bellwether Education Partners. Retrieved from https://www.tbf.org/-/media/tbf/reports-and-covers/2019/bellwether_boston-analysis-20190226.pdf?la=en

Our approach (n.d.). Retrieved from https://www.lacompact.org/.

Our impact (n.d.). The Combined Jewish Philanthropies. Retrieved July 16, 2021, https://www.cjp.org/our-impact

Our impact (n.d.). The United Way. Retrieved July 16, 2021, https://unitedwaymassbay.org/our-impact/

Parravano, C. (2001) The school-business partnership: What can it offer? *Eisenhower National Clearinghouse for Mathematics and Science Education*, 8(1), 14-15.

Portz, J. (2003). *Creating communities of learning: Public education in greater Boston*. Cambridge, Massachusetts: Harvard University.

Portz, J., Stein, L. & Jones, R. R. (1999). *City schools and city politics: Institutions and leadership in Pittsburgh, Boston, and St. Louis*. Lawrence, Kansas: University of Kansas Press.

Powell, W. W., Koput, K. W. & Smith-Doerr, L. (1996). Interorganizational collaboration and the locus of innovation: Networks of learning in biotechnology. *Administrative Science Quarterly*, 41: 116-145.

Raywid, M. A. (1987, Spring). Making school work for the new majority. *The Journal of Negro Education*, 56(2) 221-228.

Research for Action. (2004). *Private sector involvement in urban school reform. Emerging themes.* Philadelphia, PA: Author.

Rosenbaum, J. E. & Kariya, T. (1991, April). Do school achievements affect the early jobs of high school graduates in the United States and Japan? *Sociology of Education*, 64(2), 78-95.

Rosenbaum, J. E., Kariya, T., Settersten, R. & Maier, T. (1990). Market and network theories of the transition from high school to work: Their application to industrialized societies. *Annual Review of Sociology*, Vol. 16, 263-299.

Rossman, G. B. & Rallis, S. F. (2003). Learning in the field: An introduction to qualitative research (2nd ed.). Thousand Oaks, CA: Sage Publications.

Rothman, R. (1988, November 9). Business refuses to sign Boston Compact II. *Education Week*, Vol. 5.

Saltman, K. J. (2011, December 5). The failure of corporate school reform: Toward a new common school movement. Message posted to: http://www.truth-out.org/opinion/item/5280:the-failure-of-corporate-school-reform-toward-a-new-common-school-movement

Samuels, C. A. (2010). Media leader tapped to head New York city schools. *Education Week*, 30(12), 1.

Sanders, M. G (1996). *School-family-community partnerships and the academic achievement of African American, urban adolescents. Report No. 7*. Baltimore, MD: Center for Research on the Education of Students Placed At Risk.

Sanders, M. G. (2001). The role of "community" in comprehensive school, family, and community partnership programs. *Elementary School Journal*, 102(1), 19-34.

Sanders, M. G. (2003). Community involvement in schools: From concept to practice. *Education and Urban Society*, 35(2), 161-80.

Sanders, M., Sheldon, S., & Epstein, J. (2005). Improving schools' partnership programs in the national network of partnership schools. *Journal of Educational Research & Policy Studies*, 5(1), 24-47.

Sawchuck, S. (2009, December 9). Motives of 21st century skills group questioned. *Education Week*, 29(14), 18-21. Retrieved from http://www.edweek.org.

Scales, P. C., Foster, K., Mannes, M., Horst, M., Pinto, K., & Rutherford, A. (2005). School-business partnerships, developmental assets, and positive outcomes among urban high school students: A mixed-methods study. *Urban Education*, 40(2), 144-189.

Seidman, I. (2006). *Interviewing as qualitative research. A guide for researchers in education and the social sciences* (3rd ed.). New York: Teachers College Press.

Senate Hearing 100-502. (1987, October 5). *Incentives in education. Hearing on examining ways to improve and strengthen the quality of education for the city of Boston and other cities across the nation.* Before the Committee on Labor and Human Resources. United States Senate, One Hundredth Congress, First Session.

Siegel, D. J. (2010). Why universities join cross-sector social partnerships: Theory and evidence. *Journal of Higher Education Outreach and Engagement*, 14(1), 33-62.

Sheldon, S. B. (2003). Linking school--family--community partnerships in urban elementary schools to student achievement on state tests. *Urban Review*, 35(2), 149-65.

Sheldon, S. B. (2005). Testing a structural equation model of partnership program implementation and parent involvement. *Elementary School Journal*, 106(2), 171.

Sheldon, S. B. (2007). Improving student attendance with school, family, and community partnerships. *Journal of Educational Research*, 100(5), 267-275.

Sheldon, S. B. & Epstein, J. L. (2002). Improving student behavior and school discipline with family and community involvement. *Education and Urban Society*, 35(1), 4-26.

Smith, J. L. & Stovall, D. (2008, March). 'Coming home' to new homes and new schools: critical race theory and the new politics of containment. *Journal of Educational Policy*, 23(2), 135-152.

Spark Policy Institute & ORS Impact. (2018). When collective impact has an impact. A cross-site study of 25 collective impact initiatives. https://www.orsimpact.com/DirectoryAttachments/10262018_111513_477_CI_Study_Report_10-26-2018.pdf

Spring, W. (1987, March-April). Youth employment and the transition from school to work. *New England Economic Review*, Boston, Federal Reserve Board.

Stachowiak, S. & Gase, L. (2018, August 9). Does collective impact really make an impact? *Stanford Social Innovation Review.* https://ssir.org/articles/entry/does_collective_impact_really_make_an_impact

Stake, R. E. (1981). Case study methodology: An epistemological advocacy. In W. W. Welsh (ed.). Case Study Methodology in Educational Evaluation. Proceedings of the 1981 Minnesota Evaluation Conference. Minneapolis: Minnesota Research and Evaluation Center.

Summer for All. (2019, July 10). *Boston students begin "5th quarter" during national summer learning week: City recognized as national leader in innovative, enriching summer learning.* Retrieved from https://www.summerforall.org/news

The Boston Compact: An operational plan for expanded partnerships with the Boston public schools. (September, 1982).

The Boston Opportunity Agenda- First Annual Report Card, (September 2011). http://www.bostonfoundation.org/uploadedFiles/Sub_Site/web_specials/The_Boston_Opportunity_Agenda/BOA%20Report%20Card%202011.pdf. Retrieved on June 21, 2014.

The Boston Opportunity Agenda- Second Annual Report Card, (November, 2012). http://www.tbf.org/news-and-events/news/2012/november/~/media/TBFOrg/Files/Affinity%20sites/BOA_2012_Annual_Report_PROOF.pdf. Retrieved on June 21, 2014.

The Boston Opportunity Agenda- Third Annual Report Card, November 2013). http://www.tbf.org/~/media/TBFOrg/Files/Reports/BOA%202013_FINAL2lo.pdf. Retrieved on June 21, 2014.

The Bridgespan Group (n.d). *Case study: Cincinnati, Covington, and Newport*. https://www.bridgespan.org/bridgespan/Images/articles/needle-moving-community-collaboratives/profiles/community-collaboratives-case-study-cinncinnati.pdf

The National Science Foundation. (1983) *Educating Americans for the 21st century: A report to the American people and the national science board*. Washington, DC.

Teaching Academies. (n.d.). Retrieved from https://www.bpe.org/boston-teacher-residency/about/teaching-academies/

Ungureanu, P., Bertolotti, F., Mattarelli, E., & Bellesia, F. (2020). Collaboration and identity formation in strategic interorganizational partnerships: An exploration of swift identity processes. *Strategic Organization*, *18*(1), 171–211. https://doi.org/10.1177/1476127019840148

United States National Commission on Excellence in Education (1983). *A nation at risk: The imperative for educational reform : a report to the Nation and the Secretary of Education, United States Department of Education*. Washington, D.C.: The Commission.

Van de Ven, A. H. (1976). On the nature, formation, and maintenance of relations among organizations. *Academy of Management Review*, 3, 24-36.

Varda, D.M. (2018, February 6). Are backbone organizations eroding the norms that make networks succeed? *Nonprofit Quarterly*. https://nonprofitquarterly.org/backbone-organizations-eroding-norms-make-networks-succeed/

Waddock, S.A. & Post, J.E. (1991, Sep.-Oct.). Social entrepreneurs and catalytic change. *Public Administration Review*, 51(5), 393-401.

Waddock, S. A. (1992). The National Alliance of Business compact project: Business involvement in public education. In J.E. Post (Ed.), *Research in corporate social performance and policy*, 13: 31-82. Greenwich, CT: JAI Press.

Waddock, S. A. (1993). Lessons from the National Alliance of Business compact project: Business and public education reform. *Human Relations, 46*(7), 849-879. Retrieved from http://ezproxy.lib.umb.edu/login?url=http://search.proquest.com/docview/231488729?accountid=28932

Waddock, S. A. (1995). *Not by schools alone: sharing responsibility for America's education reform*. Westport, Connecticut: Praeger.

Where we work. (n.d.). Strive Network. Retrieved from https://www.strivetogether.org/where-we-work/join-the-network/#sub-menu

White, R. E. (2007). The anatomy of a corporate transaction: Understanding corporate involvement in two Canadian school districts. *International Journal of Leadership in Education*, 10(2), 153-169.

Who we are (n.d). The Boston Opportunity Agenda. Retrieved from https://www.bostonopportunityagenda.org/who-we-are

Wolff, T. (2016, April 28). Voices from the field: 10 places that collective impact gets it wrong. *Nonprofit Quarterly*.

Wolff, T., Minkler, M., Wolfe, S.M., Berkowitz, B., Bowen, L., Butterfoss, F.D., Christens, B.D., Francisco, V.T., Himmelman, A.T. & Lee, K.S. (2016, Winter). Collaborating for equity and justice: Moving beyond collective impact. *Nonprofit Quarterly.*

Woodside, W. S. (1986). The future of public-private partnerships. *Proceedings of the Academy of Political Science*, 36(2), 150-154.

Yin, R. K. (1989). Case study research: Design and methods (revised ed.). Thousand Oaks, CA: Sage Publications.

Yin, R. K. (2003). *Case study research: Design and methods* (3rd ed.). Thousand Oaks, CA: Sage Publications.