EXPLORING EDUCATIONAL ECOSYSTEMS THROUGH THE LENS OF INTERMEDIARY ORGANIZATIONS: INSIGHTS FOR POLICY AND PRACTICE

CHAPTER ONE
EXECUTIVE SUMMARY

In our study of the educational ecosystems that surround schools, we recognized a growing global trend that has positioned "intermediary organizations," and particularly non-system intermediary organizations, or those not involved in the formal governmental education system, in an oversized ecosystem role. Through their direct work with schools, especially the most vulnerable schools, these organizations straddle the larger ecosystem and the local schoolhouse, becoming a primary and proximal conduit of external leadership resources into schools. With this in mind, we examined a set of more mature non-system intermediary organizations that work directly with schools to generate important insights about their work in forging relationships within and gaining vital resources from these expansive and diffuse ecosystems. Examining the ecosystem from the vantage point of these organizations has potential for helping non-system intermediary organizations to better consider and gain access to the kinds of ecosystem relationships and resources that are likely to prove important to their work, to schools, and to students. It also sheds light on broader issues relevant for ecosystem-building efforts.

The interest in and expectation for the improvement of schooling for students throughout the globe has grown in profound ways over the last several decades. During this time two related areas of work, both associated with leadership, have generated insights of high value to this work. One area of work has centered on the importance of within-school leadership to schooling and student outcomes. The importance of principal leadership to schools and their students has been amplified through recent work by Grissom and his colleagues, which examined the relevant US research base since 2000 and concluded that "principal leadership matters substantially" (2021, xiv). A second area of work has drawn attention to the importance of more distributed forms of leadership where leadership extends across and engages multiple individuals and their materials (Spillane, 2012; Spillane & Diamond, 2007). Among other things, this work has drawn attention to the educational context beyond the schoolhouse as an additional

source of leadership affecting schooling and student learning (Childs & Russell, 2017; CPRL, 2017; Spillane et al., 2019a, b) and has prompted a framing of educational leadership as both multi-level and distributed rather than situated solely within the school and tethered to the role of the principal (Spillane et al., 2019a, p. vi). However, if multi-level forms of distributed leadership are to be amplified and harnessed in service of schools, it will be critical to gain more insights about the educational ecosystem that surround schools.

In this report, we draw from this recent work of Spillane and his colleagues (2019a), who propose a multi-level distributed leadership framework, as we begin to explore the educational ecosystem that surrounds schools as a leadership resource to schools. Such a perspective conceptualizes educational leadership as "broadly embedded in social relationships of influence [that extend] across multiple individual players and organizations,"(p. xi). Additionally, this framing concurrently elevates the influence of various ecosystem relationships and resources on leaderships and schools, and it presses for greater attention to be given to the cultivation of relationships between and access to resources from various ecosystem entities as ecosystems are explored.

Given that global trends over the last several decades have given rise to intermediary organizations (IOs), and particularly non-system IOs, as a primary and proximal conduit of external sources of leadership into schools, these organizations are now likely to play an oversized role in the educational ecosystem that surrounds a school. This is particularly true with respect to the most vulnerable and struggling schools, in part because of their amplified needs but also in the face of mounting policy expectations and funding opportunities that require such external collaboration (Meyers & VanGronigen, 2018). The position that IOs hold—one that straddles the school and the larger educational ecosystem—generates opportunities for interactions with other ecosystem actors (Spillane et al., 2019a), and for using their vantage point as an important

window into the broader educational ecosystem more generally. Thus, exploring the interactions and relationships between these organizations and other ecosystem entities hold potential for deepening our understanding of educational ecosystems more generally and for helping us to identify the types and flow of resources across the ecosystem and to IOs as a primary conduit into schools.

Such an examination is likely to also be of high value to IOs more specifically. Importantly, recent studies have called into question the impact of many of these organizations on schools as well as the their general lack of internal capacity for taking up such work (Hatch et al., 2019; Meyers & VanGronigen, 2018; VanGronigen et al., 2020). As Hatch and his colleagues concluded: "policymakers cannot assume that external support providers already have the resources and the expertise that schools need to improve outcomes" (p. 27). These sorts of findings press for greater attention to be given to the broader educational ecosystem and to the kinds of supportive connections and relationships that can be forged between these organizations and other ecosystem actors (Hatch et al., 2019). This perspective recognizes that IOs operate within the broader educational ecosystem which holds potential as a space for developing relationships with, as well as gaining critical resources from, an assortment of other actors and organizations within the ecosystem— relationships and resources that are likely to shape and be consequential to their work with schools as well as to schools and students more directly (Hatch et al., 2019; Spillane et al., 2019a, b).

With this assortment of issues in mind, we chose to study a set of IOs to gain important insights about their work in cultivating relationships within and gaining vital resources from these expansive and diffuse ecosystems. We examined five IOs within one national context —the United States (US)— selected as a setting because of the relative maturity of this ecosystem context, which we expected to offer more robust insights into ecosystem

interactions, relationships, and resources. We chose to examine non-system IOs, sometimes called non-governmental organizations (NGOs), because this type of IO is commonly engaged as a direct support to schools in a wide range of contexts globally. Remarking on this phenomena in the US, Russell and her colleagues (2015) called non-system actors "key players in the modern era of [educational] reform" (p. 16). Additionally, the five IOs were selected because of their longevity of experience, each with at least 15 years in more direct work with schools, and because of their collection and report of impact data. Beyond these similarities, we also sought some variability across our set of five cases, which led us to include organizations with different geographical reaches, that deployed different types of interventions, and that included a mix of for-profit and not-for-profit organizations.

Through this work, we asked and answered a set of related research questions:

1. How do these IOs interact with the broader educational ecosystem and for what purposes? What can we learn about the initiation and stability of these interactions?
2. What types of relationships exist between these organizations and other ecosystem entities? What are the factors that shape relationship formation and mutuality?
3. What are the key resources within the broader educational system that are accessed and made use of by these organizations? What are the factors that shape resource access?

Below we briefly summarize key findings in three broad areas: (a) ecosystem interactions, (b) ecosystem relationships, and (c) ecosystem resources.

1. Ecosystem interactions

What we learned about the nature, range, and types of IO ecosystem interactions

- IOs were invested in and actively engaged with a wide range of ecosystem players. We noted interactions that were frequent and diverse, in time intervals that ranged from occasional to routine and across a wide range of settings and circumstances.
- IOs interacted with the following types of system entities: districts, federal agencies, state agencies, boards of education, local government councils, and special committees.
- IOs interacted with the following types of non-system entities: businesses; professional organizations; peer not-for-profits; university and non-university research partners; local and national philanthropies; and community-based organizations.
- IOs also interacted with key ecosystem actors: those who championed the IO within their professional contexts; "angel" donors; and intellectual and thought partners.
- Beyond organizations and individuals within the educational ecosystem, IOs also sought access to more free-standing research and practice literature.

What we learned about the nature, range, and types of IO ecosystem interactions

IO interactions with others in the educational ecosystem were for a broad assortment of purposes including:

- Developing and accessing financial resources
- Accessing non-financial, mission-critical resources
- Accessing expertise and intellectual capital
- Testing and validating program theories

- and claims
- Understanding and influencing critical policy contexts
- Building standing and reputation through participation in networks
- Solving technical problems

What we learned about the directionality of interaction initiation

Three primary patterns of initiation were evidenced by all five IOs including;

- Direct outreach to potential partners and client organizations
- Direct "in-reach" from potential partners and client organizations
- Mediated initiation of contact through third-party associations

What we learned about the stability of IO's ecosystem interactions

- The relationships formed by the study's IOs are moderately to highly stable.
- This reflects the relative maturity of the five IOs, most of which had been operating for multiple decades.
- Sustaining stable ecosystem relationships requires overcoming turbulent and disruptive factors in the ecosystem itself.

2. Ecosystem relationships

What we learned about the types of ecosystem relationships

We identified four primary modes or types of relationships that were formed between IOs and others in the ecosystem:

- Contractual relationships and financial arrangements
- Bridging, brokering, facilitating relationships
- Collaborative relationships
- Consultative relationships for sharing expertise

What we learned about factors that shape relationships formation

Several factors were implicated in the formation of ecosystem relationships.
Some factors were features of the ecosystem at large:

- Financial constraints within the broader ecosystem
- Active influence of field-engaged bridging or brokering agents

Some factors were internal to the IOs themselves:

- Balancing mission "non-negotiables" and collaborative flexibility
- Investments in roles, structures and routines of outreach
- Developing a graduated structure of engagement

What we learned about relationship mutuality

Our data suggest a continuum of common interest in these associations, from the transactional, to more sustained alliances, to the integral and "symbiotic."

Three contexts of partnership were notable for their synergy and mutuality:

- Alliances featuring knowledge sharing and skill set complementarity
- Alliances with organizational thought partners
- Joint work organized around strong common values or identifications

3. Resources

What we learned about resources gained by IOs

Each of the five focal IOs reported accessing a moderate to wide range of resources from their ecosystem interactions.

Types of resources included:

- Material resources, particularly financial resources, research or knowledge and frameworks, and tools
- Human resources, particularly practitioner knowledge, special and technical expertise, and talent/personnel
- Social resources, particularly long-term collegial relationships yielding opportunities to influence policy, vie for financial support, and sustain lines of communication

What we learned about factors that shape resource flow

Several factors shaped the flow of ecosystem resources to the case IOs, including:

- The type of organization affording the resource
- The context in which the organization is situated
- The prominence of the organization within the greater ecosystem
- The IO's participation in collaborative networks.
- Participation in collaborative networks was the most-frequently mentioned factor shaping resource flow.

Conclusions and implications

Broadly, this report generates important insights into the relational and resource landscape within educational ecosystems surrounding schools in the national context of the United States as well as about the value of these contexts for non-system IOs. Although we looked at only five such IOs to understand their ecosystem relationships, we surfaced the names of dozens of organizations and individuals with which the five organizations were engaged in substantive relationships that delivered significant ecosystem resources to each organization. The sheer scale and density of the educational ecosystem and the range of ecosystem resources that were accessed by these organizations is noteworthy. All five organizations reported an assortment of interactions with and resources gained from the ecosystem. Given that little attention has been given to unearthing and understanding the kinds of interactions that occur between various educational ecosystem entities, this finding is noteworthy. Additionally, the extent of interactions that were evidenced and the range of resources that were gained also suggests the importance of ecosystems to this collection of more mature non-system IOs. To be specific, these findings suggest that more mature national contexts, like the US, are likely to hold promise as a relational and resource rich ecosystem context that could be leveraged by non-system IOs for capacity building, and by extension, in their service to and work with schools.

The prospect of leveraging educational ecosystems as a facet of non-system IO capacity development is important for several reasons. First, as we elaborate in Chapter Three, a broad assortment of factors have contributed to the current global presence of non-system IOs working directly with schools, and especially those schools that have historically been underserved and proven the most challenging to improve. Given the pressure for improving student learning and the pervasive lack of adequate resources experienced by so many schools across the globe, two issues that are not likely to subside in the near future, there is

no reason to expect a reduction in the "demand for" (Hatch et al., 2019, p. 2) non-system IO engagement with schools. Certainly, this amplifies both the concern about the internal capacity of IOs to provide adequate leadership resources and supports to schools (Hatch et al., 2019; Meyers & VanGronigen, 2018) as well as the need for insights that might be vital to their capacity development. This study contributes to the latter need by revealing the ecosystem as a context that could prove viable for supporting such capacity building, and by making visible how such a strategy might be enacted by non-system IOs as they seek to better access and make use of the surrounding educational ecosystem in their capacity building efforts.

More specifically, this report generates important insights about the educational ecosystem interactions, relationships, and resources that were accessed by five non-system IOs. Importantly, it makes visible the nature, types, and purposes of interactions that could prove vital to such IOs as well as issues associated with interaction initiation and stability. Although prior research has more generally explained ecosystem interactions between various ecosystem entities for the purposes of collaboration, when organizations have shared interests or goals, and resource attainment (DeBray et al., 2014; Haddad, 2020; Hatch et al., 2019; Russell et al., 2013, Massell et al., 2012; Orphan et al., 2021), our findings provide more granular insights about the kinds of organizational needs that could be addressed through ecosystem interactions.

Although seven distinct ecosystem interaction purposes were noted, we draw two purposes forward for additional discussion. Research suggests that the collection and analysis of impact data is not likely to be a common practice among IOs (Meyers & VanGronigen, 2018). As a result, many IOs are not likely to have evidence about the impact of their work on schools or students. Not only did each of these organizations report such areas of work, but they engaged the educational ecosystem for such purposes. Thus, these organizations provide insights that could be of value for other non-system IOs that have yet to make

traction on assessing their impact. Second, each of these organizations allocated time for ecosystem interactions for the purpose of building standing and reputation. There is certainly reason to suspect that these two actions, independently as well as in combination, may have contributed to their relative success at gaining resources from their ecosystems (Bloemraad & de Graauw, 2020; Walker & Grossman, 1999).

Our findings also reveal the types of relationships that are likely to be formed with others in the ecosystem and shed light on the key factors--both internal to the organization and associated with the border ecosystem-- that are likely to shape relationship formation. Related to the latter point, prior research largely draws attention to external factors, such as key events or networked gatherings, as catalyzing relationships (Cooper, 2012; DeBray et al., 2014; Haddad, 2020; Russell et al., 2013). Our findings suggest that both internal and external factors are at play in shaping relationship formation between non-system IOs and other entities in the ecosystem. Chief among these internal factors is the organization's investment in roles, structures, and routines within the organization that lend support for ecosystem scanning and outreach, particularly as the scope and scale of the organization's work increases. Not surprisingly, the importance of infrastructure to organizations has emerged in other contexts and for other purposes (Hopkins et al., 2018). Thus, this finding helps to connect this concept to IOs and their ecosystem interactions, and these cases offer illustrations of infrastructure considerations and designs that could be of value to other non-system IOs.

Lastly and importantly, our findings make visible an array of resources that might be accessible within the ecosystem that could prove vital to non-system IOs, and by extension, the schools served by such organizations. Although we have come to regard three categories of resources as useful to IOs— material, human, and social resources (Russell et al., 2013, 2015), this study provides more granular insights about particular kinds of resources within these three broad category types that might be accessed by non-system IOs from their ecosystem. Importantly, our findings begin to fortify the bridge between

various resources and the kinds of key organizational needs that could be addressed through such resource access. Taken collectively, this constellation of insights about ecosystem interactions, relationships, and resources are likely to be of value to non-system IOs as they look to their ecosystems for capacity building support.

Beyond implications for non-system IOs, these findings also generate implications for policy and practices intended to shape educational ecosystem or ecosystem development. We draw attention to several points for deeper consideration. First, understanding the assortment of ecosystem entities and resources that these organizations drew upon makes visible key entailments of an educational ecosystem of value to non-system IOs, which could in turn be drawn upon for considering the nature and quality of such ecosystems more generally. Thus, this information would be of value for those in positions to act on shaping or cultivating these sorts of ecosystems or addressing ecosystem gaps. Consistent with prior research (Cooper, 2012; DeBray et al., 2014; Russell et al., 2013), we saw strong evidence of multiple benefits of networks that were formed to bring together some segment of an educational ecosystem—oftentimes groups of peer IOs and one or more philanthropic organizations. On the one prior research points to the importance of such networks for harnessing non-system actors "expertise and other resources not found in sufficient concentration in the formal [education] system" (Russell et al., 2015, p. 16). But our findings also make visible an assortment of benefits that can be accessed by non-system IOs through network engagement. Beyond brokering important connections between organizations/individuals and raising member organization visibility, networks are likely an important strategy for substantive knowledge sharing and practice inquiry in the ecosystem. However, there are many network implementation and management issues to consider if the utility of networks is to be achieved (Russell et al., 2015). Although beyond the scope of our study, others have pointed to the complexity of network management and to the kinds of issues that should be considered (Russell et al., 2015) by those undertaking network design and management as part of an ecosystem development approach.

Lastly, these findings suggest areas for future research. Broadly, our study bolsters arguments for more systematic study of the range, breadth, and geographical or national diversity of ecosystem entities as they engage with non-system IOs as a conduit of resources to schools and districts. Such examinations may, among other things, help to clarify the difficulties faced by non-system IOs in other national contexts with much more sparse ecosystems to draw upon. Second, although we took important steps to make sense of the kinds of ecosystem interactions, relationships and resources that prove useful to these organizations, we left several related questions for further exploration. Given that we conducted this study during the pandemic, at a time when most schools were physically shuttered for large portions of time and all were facing considerable disruption, we did not engage schools to further trace the flow of ecosystem resources from these organizations into schools. Given that these organizations are likely to be a primary source of external leadership for schools, it would be useful to make sense of how accessed resources are activated by these organizations and transferred to, or otherwise made use of by them, in their work with schools; how these resources shape the work in schools and/or become connected in some fashion with educators in schools. Third, given the maturity of the five non-system IOs, an indication of their survival over time, and levels of impact data, our study may point to skillful ecosystem engagement as a positive contributor. Both the attention given to ecosystem engagement by the case organizations and the diversity of the resources captured through this engagement suggest the need to further investigate the hypothesis that a potentially potent factor in non-system IO success, especially under competitive conditions, hinges on the capacity of such organizations to forge and sustain targeted ecosystem partnerships, selectively and strategically.