

Collaborating to Innovate: How School Districts Work with Outside Organizations to
Design and Implement a New Program

by

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ABSTRACT

The COVID-19 pandemic, along with historical inequities, resulted in a widening of the achievement gap between underserved populations and more advantaged students. In response to this issue, California took action by allocating additional funds to public school districts for out-of-school-time services through the Expanded Learning Opportunities Program (ELOP). This study examined how a public school district and three external organizations negotiated the development of a viable plan for implementing the first year of summer ELOP programming. The multiple case study included qualitative analysis of the collaborative process between each district–organization dyad. Each dyad was analyzed as an independent case and then a cross-case analysis was completed. Results revealed two significant components of the emergent collaborative relationship, including developing a shared vision and creating new practices. The study identified key competencies from previous domains that support or obstruct the development of a shared project and highlighted the critical role of a broker in fostering alignment and community development. Implications for practice include strategies for effective interorganizational collaboration and innovation in educational programs.

DEDICATION

This study is dedicated to my family, friends, and mentors who encouraged me throughout the process. Without your endless support, the realization of this dream would not have been possible. I am forever grateful.

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CHAPTER 1

INTRODUCTION TO THE STUDY

Larger Context

Achievement Gap

The achievement gap has been part of the K–12 educational lexicon from its inception in the Coleman Report, officially named Equality of Educational Opportunity (Coleman, 1966). In this seminal book, Coleman described the persistent disparities in educational achievement indicators between advantaged and disadvantaged groups. Coleman (1966) detailed the impact of home, community, and in-school factors as main contributors to academic performance. The consistent disparity in performance is a multifaceted and complex phenomenon embedded in the educational system.

The achievement gap measures most often include standardized test scores in reading and math, but they can also include any measure of educational performance, including dropout rates, suspension rates, absenteeism, course performance, and other data points. Generally, in the United States, the achievement gap is calculated for students in racial subgroups compared to their white peers or socioeconomically disadvantaged students compared to those of higher income groups, but the achievement gap can also be studied through the lens of gender, rural versus urban schools, and any other measure that may produce a performance gap. Based on the population and demographics of the state, California has increased focus on students from three groups: (a) English learners, (b) low socioeconomic status, and (c) foster youth. Significant funding and services have been allocated to address the persistent achievement gap between these three groups and more advantaged peers.

Impact of COVID-19 on Public Education

The disruption in K–12 education caused by COVID-19 exacerbated the existing achievement gap. Schools closed their doors across the nation in the spring of 2020 due to COVID-19 stay at home orders, and many students were not able to return to full-day in-person learning for more than 18 months. Schools quickly pivoted to distance learning and a reimagined educational system, but the digital format represented a negative change for most students. Along with the health and economic hardships caused by the pandemic, student achievement and well-being were also impacted by the cultural instability of the time. A report by the United States Department of Education’s Office for Civil Rights (2021) stated, “This Report bears witness to the many ways that COVID-19, with all of its tragic impacts on individuals, families, and communities, appears to be deepening divides in educational opportunity across our nation’s classrooms and campuses” (p. 1).

In response to the hardships faced by school districts in adjusting and readjusting to the needs of K–12 students during the pandemic, the federal government stepped in with three packages of relief aid. The Coronavirus Aid, Relief, and Economic Security Act (CARES), the Coronavirus Response and Relief Supplemental Appropriations Act (CRRSA), and the American Rescue Plan (ARP) all provided funding to K–12 education to mitigate the costs associated with moving to virtual learning in the early days of the pandemic and later to address student and district need caused by the pandemic. The specific student needs were determined by local districts but included supporting the move to virtual instruction, supporting academic needs, and providing social–emotional

support. In total, the funding for the three packages amounted to \$190 billion for K–12 schools (Lieberman & Ujifusa, 2021).

Although the aid packages allowed districts to navigate some of the needs caused by the pandemic, it was not sufficient to mitigate the impact of the disruption on student learning and student well-being, particularly for underserved populations. The long-term impact on students has not yet been determined, but preliminary research and data from national testing in 2022 indicated that the COVID-19 pandemic continues to influence student performance negatively. Underserved populations reflect the largest and most significant decline in achievement.

The National Assessment of Educational Progress (National Assessment of Educational Progress [NAEP], n.d.), also known as the nation’s report card, provides vital information on student achievement in various subjects. It is a congressionally mandated program that is administered by the National Center for Education Statistics (NCES) and has represented an important influence on policy and practice in American education since its inception in 1969. The assessment allows for a comparative analysis across states and age levels to gauge students’ academic performance.

Within the NAEP assessment protocols are the long-term trend (LTT) assessments, which provide math and reading data for students aged nine, 13, and 17 (NAEP, n.d.). The assessment is typically administered every 4 years, and this trend data provides valuable long-term information on students over time. In 2022, NAEP administered a special LTT exclusively to nine-year-olds to collect academic achievement data on the impact of the pandemic on student achievement. This special assessment included both math and reading. Scores for nine-year-old students declined

from 2020 in both reading and mathematics, with an overall 5-point decrease in reading and a 7-point decrease in math (NAEP, n.d.). This decline represents the biggest drop in average scores in reading since 1990 and the first ever score decline in math. The largest score declines were for the students in the lowest percentile of achievement for both reading and math, as seen in Table 1 and Table 2. The data suggests that students who were already struggling prior to the pandemic fell further behind during the pandemic. Although the NAEP data is not designed to determine the cause of data changes, the results indicate a crisis in student learning for the most vulnerable students as a result of the COVID-19 pandemic.

Table 1

2022 NAEP Scores for Nine-Year-Olds in Reading Based on Percentile Rank

Percentile	2020 Score	2022 Score	Change
90th	267	265	-2
75th	247	244	-3
50th	224	219	-4
25th	196	188	-8
10th	164	155	-10

Table 2*2022 NAEP Scores for Nine-Year-Olds in Math Based on Percentile Rank*

Percentile	2020 Score	2022 Score	Change
90th	286	283	-3
75th	267	262	-5
50th	245	238	-8
25th	219	208	-11
10th	191	178	-12

Data on the California Assessment of Student Performance and Progress (CAASPP) also indicated a decline in academic performance in reading and math during the pandemic (California Department of Education [CDE], 2023). When 2022 data was compared to data from before the pandemic in 2019, student scores decreased significantly. The assessment uses the measures of “meeting” and “exceeding” standards to represent student scores compared to the state standards for each grade level. Statewide, students scoring at the meeting or exceeding standards on the CAASPP declined from 51% to 47% in English Language Arts (ELA) and from 40% to 33% for mathematics (CDE, 2023). As seen in Table 3, the decline was greater for underserved populations.

Table 3

Percent of Students Meeting or Exceeding Standards in Reading and Math on the CAASPP

	Reading		Math	
	2019	2022	2019	2022
All Students	51.10%	47.06%	39.73%	33.38%
EL	12.80%	12.47%	12.58%	09.71%
Economically Disadvantaged	39.19%	35.24%	27.48%	21.23%
Foster Youth	No data	20.64%	No data	10.38%

The emotional well-being of young students also suffered due to the pandemic. A survey conducted by the American Psychological Association (2020) found that 71% of parents reported concern about the impact of the pandemic on their children’s social development. In addition, a review of research on the pandemic’s impact on childhood mental health found that the critical developmental age of children created a greater vulnerability to negative mental health consequences of the stresses caused by the pandemic (Samji et al., 2022). The pandemic impacted academic and social–emotional well-being, creating additional student needs.

The pandemic disproportionately impacted underserved populations in all areas. The COVID-19 pandemic exacerbated the achievement gaps for underserved students. The 2021–2022 California state budget included a total of \$123.9 billion for education to address the educational crisis, including \$4.6 billion over 5 years for a COVID relief

initiative of the Expanded Learning Opportunities Program (Office of Governor Gavin Newsom, 2021).

Expanded Learning Opportunities Program

The Expanded Learning Opportunities Program (ELOP) approved through California State Assembly Bill 130, later amended by AB 167, addresses the persistent achievement gaps for underserved populations and the increase in the achievement gap due to the COVID-19 pandemic. In California, underserved students are defined as those who are English learners, qualify for free or reduced lunch, or are foster youth. California Education Code (Education Code, n.d.) often refers to them as “unduplicated students” (UPP) because funding is allocated to districts based on the number of students who fall into one or more categories, but for fiscal purposes, the students can only count once, even if they meet more than one category (EC sections 2574(b)(2) and 42238.02(b)(1)). Although the students are commonly referred to as “UPP,” this research used the term “underserved” outside of fiscal terms. Throughout this research, the student achievement initiatives and enrichment services will be directed toward this defined group of underserved students. In 2020–2021, the most current year for public data, the UPP count represented 55.73% of the total population of students in public schools in California (Ed-Data, n.d.).

The ELOP law provides funding for learning programs outside the traditional school day, including before and after-school programs and intersession and summer programs for students in transitional kindergarten (TK) through sixth grade. Districts must provide a total of 9 hours of educational time to ELOP students every day that school is in session. The time is calculated by adding the ELOP services to the existing

school hours. For example, if the school day runs for 6 hours, then the ELOP services must be in session for an additional 3 hours before or after school. Districts are also obligated to provide 30 intersession days of educational services outside of the regular school calendar. These days can include any non-school day, such as summer and breaks. Districts must provide the 9 hours of services on intersession days as well.

The intent of ELOP services is to close the achievement gap for underserved populations through comprehensive after-school and intersessional expanded learning opportunities. All of these programs should be “pupil-centered, results-driven, include community partners, and complement, but do not replicate, learning activities in the regular school day and school year” (CDE, n.d., para. 2). The intent is that ELOP will address the research concerning the achievement gap to provide services that will close the gap through enrichment and extended instructional time. Services must address literacy, physical fitness, social–emotional learning, and enrichment. Nutritional meals and snacks are also included in the requirements.

The ELOP represents a shift in thinking about the state’s responsibility to students. Public schools now provide academics, enrichment services, and childcare for many more hours per day and during non-school days. Districts must develop new thinking and new infrastructure to reach the goals of the ELOP. In addition, the law encourages districts to work with community partners to share the responsibility of designing and implementing the programs. These partnerships demand a stronger collaboration between organizations and a shift in previous practices to meet the goals of ELOP.

As the program launched across the state in the 2021–2022 school year, the guidance from the California Department of Education (CDE) was still vague and open to interpretation. Many details were not contained in the original law and, therefore, had not been outlined by the CDE. As of the time of the research, compliance indicators had not been published by the state, leaving county offices of education and districts to interpret the direction of the programs without clear guidance on implementation. All districts in California found themselves working to develop this new initiative from the ground up.

Local Context

Demographics of the District

The Simi Valley Unified School District (SVUSD) is a large suburban district outside of Los Angeles, California, that serves a total of 15,700 students in a TK–12 program. The district has a total of 28 schools, including 18 elementary schools, three middle schools, three comprehensive high schools, and four additional specialized schools. The California School Dashboard 2022 data report that within the student body, 41% of the students qualify for free or reduced lunch (FRL), 12% of the students are English learners (EL), with Spanish being the top student language other than English, and 0.4% of students are identified as foster youth (CDE, 2022).

The ELOP focuses on students in TK through sixth grade. Within Simi Valley Unified, the unduplicated student count represents 4,071 students across all elementary schools and the sixth graders at the middle school level. The state directive is to offer services to all qualifying students but to serve at least 50%. For Simi Valley Unified, the district goal is to serve over 2,000 students per year in ELOPs.

Role of the Researcher

Although the ELOP grant began in the 2021–2022 school year, Simi Valley Unified did not have the staff to implement the program. In the 2022–2023 school year, Simi Valley Unified created a new position to develop and implement the ELOP within the district. As the assistant director of early and expanded learning, I am responsible for the ELOP program for Simi Valley Unified. In the first year of the ELOP implementation, I first organized a district team that I refer to as the ELOP community of practice consisting of district employees with a variety of expertise. For example, there are representatives from site administration, counseling, teachers, fiscal specialists, and other areas. In the second semester of the 2022–2023 school year, I launched a pilot of after-school programs with the childcare providers that lease or own space on our campuses. These community partners include the local YMCA, Boys and Girls Club, and Rancho Simi Recreation and Park District (RSRPD). The next step was to continue working with the same community partners to develop and implement the intersession programs, including a summer program. In all cases, my position demands that I represent the district in developing and managing the collaborative relationships that will lead to a successful implementation of ELOP across the district.

Community Partners for After-School Care and Summer School

All elementary schools within Simi Valley Unified School District have a childcare provider on site. The YMCA, Boys and Girls Club, and RSRPD lease or own space on all elementary and middle school campuses for before and after-school care. The organizations generally have a dedicated portable classroom on the school property, and they use the school bathroom and playground facilities during operating hours.

For the YMCA and RSRPD, all registration, payment, and programming are handled exclusively by the organization. There is no overlap with the school district. It is a mutually beneficial relationship, but the function of the childcare and the district operations generally remain very separate. On the other hand, the Boys and Girls Club does operate an after-school education and safety (ASES) program on three sites, in addition to regular childcare services at their clubhouse. ASES is a federally funded after-school program dedicated to serving low-income students. It is a competitive grant allocated to school sites based on student poverty rates. As a government program, ASES must meet compliance indicators for all aspects of the program. The district is tied to the ASES program through both funding and compliance. Although the funding streams and the compliance indicators are different for ASES and ELOP, state law allows districts to combine the two programs into a single comprehensive program.

Problem of Practice

The COVID-19 pandemic, along with historical inequities, has resulted in a significant achievement gap between underserved populations and more advantaged students. California has addressed this problem by providing additional funds to public school districts to serve identified underserved students through an ELOP. The program requires districts to offer extended hours of care, learning opportunities, and intersession opportunities. The funding represents a significant innovation in public education and districts' responsibility in the lives of students and families. The state encourages districts to partner with outside organizations to implement services.

In almost all cases, the outside organizations serve the purpose of childcare or a specific enrichment activity. A school district, on the other hand, primarily addresses

student academic needs. In the case of ELOP services for Simi Valley Unified, the district will plan with the organizations to develop high-quality programs, but the implementation is completed independently by each organization. This structure makes the collaborative relationship vital to the success of the programs. The district and the organizations must develop a common understanding of the vision and purpose of ELOP services to work interconnectedly and independently in developing and implementing services. In order to develop an effective ELOP innovation plan, both the school district and outside organizations must collaborate and problem-solve effectively to develop a new, common vision and working relationship regarding ELOP services.

Research Questions

The research addressed the problem of practice through the following research question and subquestions:

Research Question 1: How do team members from different organizations negotiate the development of a viable plan for implementing a new initiative?

- a) What new practices develop as they work together on a shared project?
- b) What competencies from their previous domains support or obstruct new practice development?
- c) How do the new practices align with the shared goal of the initiative to mitigate the impact of COVID through expanded learning services?
- d) How does the broker's role support or obstruct community development?

CHAPTER 2

THEORETICAL PERSPECTIVES GUIDING THE STUDY

The study's goal was to investigate the development of collaborative partnerships between a K–12 school district and outside organizations with the task of developing and implementing an ELOP for elementary students. The Simi Valley Unified School District collaborated with three outside organizations on a summer program for underserved students in accordance with the state of California's ELOP funding. The intention of the ELOP funding is to mitigate the disproportional impact of the COVID-19 pandemic on underserved populations. ELOP identifies eligible students as those from low socioeconomic households, EL, and foster youth. The following chapter will first discuss life course theory concerning the critical academic, social, and behavioral skill-building present in the elementary years and the long-term consequences if those skills are not developed. The discussion on life course theory will continue with the historical context of COVID-19 and California's response to the disruption that the pandemic caused in the educational trajectories of young children. The interorganizational collaboration in this study was focused on developing a shared project that follows the intention of ELOP to serve the youngest and most vulnerable students. Next, theoretical perspectives of communities of practice (CoP) are reviewed to understand better the adult learning teams within the ELOP summer project. Implementing an ELOP summer program requires a deeper collaborative relationship between the school district and outside organizations to realize the intentions of the funding. Each of the three organizations, as well as the school district, has its own communities and its distinct practices. The study sought to

understand how collaboration and learning could develop by implementing a shared project.

Life Course Theory

Life course theory posits that humans continue to develop throughout their life span from birth to death, and this development is impacted by an array of individual and environmental factors with particular consideration given to social and historical contexts (Elder et al., 2003; Hutchinson, 2015). The theory was originally developed through analysis of longitudinal data collected on cohorts during the early part of the 20th century. Glen Elder (1998) examined this data to analyze the impact of a significant historical event, the Great Depression, on life trajectories for both individuals and families. Based on these and other long-term studies, Elder theorized that “historical forces shape the social trajectories of family, education, and work, and they in turn influence behavior and particular lines of development” (p. 2). Elder (1998) affirmed four key principles within the theory: historical time and place, timing in lives, linked lives, and human agency. As the theory has developed over the past decades, studies have focused on the interplay of trajectories and life transitions that can lead to positive or negative consequences. The theory has served to understand better human experience in the diverse fields of economics, healthcare, psychology, and education (Hutchinson, 2015).

In this study, life course theory grounds the historical context of the pandemic and provides a framework for the goals of the ELOP funding. Benner and Mistry (2020) posited that examining the pandemic through the lens of life course provides researchers with a theoretical framework for the potential long-term impact of COVID and provides

policymakers with a structure to inform future decisions to mitigate the impact. COVID-19 disrupted many aspects of life, particularly that of schooling, leading to a significant impact on students' educational trajectories. The state government enacted funding and programs to mitigate the loss, one of which is the ELOP funding, but to successfully implement the expanded services and programs outlined in ELOP, districts are encouraged by the state to develop new collaborative relationships with outside organizations to realize the goal. Each of the four key principles of life course theory will be reviewed within the context of the study.

Historical Time and Place

The historical time and place in which a person lives shapes and guides life trajectories, impacting both opportunities and constraints within individuals and families. Events such as war, economic downturns, and large-scale political changes can modify the trajectory of an entire cohort's life course (Elder, 1998). The COVID-19 pandemic represents a global event that shaped life throughout the world. One significant impact of the pandemic was the disruption of schooling across the nation and across the world, upsetting the traditional school day for an extended amount of time. According to data collected by the United Nations Educational, Scientific and Cultural Organization (2020), schools in the United States were closed partially or fully for an average of 71 weeks due to the pandemic as of November 2021. In addition to the change in school context, the pandemic caused economic hardship, stress from illness and death in families, and other significant disruptions to normal life (United Nations Sustainable Development Group, 2020). These extensive changes created adverse student effects in both the short term and potentially the long term, not only in academics but also in the social and behavioral

trajectories of children (United Nations Sustainable Development Group, 2020; U.S. Department of Education, Office for Civil Rights, 2021).

Simi Valley Unified School District shut down in-person learning along with most of the country in March 2020. The district and the schools scrambled to transition to virtual learning during the spring semester and remained virtual at the opening of the 2020–2021 school year. In November 2020, Simi Valley Unified elementary schools opened a partial day of in-person learning for students in K–3 who wished to return. The intent of the school district led by the state COVID policy was to return the youngest and most vulnerable students to in-person learning. In January, the remainder of the elementary grade levels, 4–6, also opened for optional partial-day in-person instruction. Although the percentage fluctuated across the course of the spring semester, an average of 40% of the elementary student body returned to partial-day in-person learning while the rest stayed home for virtual instruction. Under continued safety measures, the district schools opened to full-time instruction in the fall of 2021. Although students were able to return to full-time, in-person learning, the school year continued outside a typical school experience. Masks, social distancing, quarantines, and limited activities continued to create a modified school day. By the start of the 2022–2023 school year, students had missed almost 2 and one-half years of a normal school experience and the social, behavioral, and academic milestones that come with it.

The enormous impact on children’s academic and behavioral well-being was quickly reflected in the research across many metrics. As discussed in the previous chapter, the NAEP reported the largest score decline in math since the inception of the test; students scored five points lower in fourth grade in 2022 compared to 2019 (NAEP,

n.d.). In reading, the decline was three points for fourth graders in that same time period (NAEP, n.d.). The declines were greater for the lowest-performing students. In reading, those at the 10% percentile decreased by nine points, while children in the 90% percentile only decreased by two points. The gap was even greater in math. The students at the 10% percentile decreased by 13 points, while those at the 90% percentile only decreased by three points (NAEP, n.d.).

Data also indicated that childhood mental health declined during the pandemic. For example, emergency room visits for mental health in five- to 11-year-olds increased by 24% from 2019 to 2020 (Leeb et al., 2020). Chronic absenteeism, defined by students missing 10% or more of instructional time, is another measure of student well-being and engagement. Students who are chronically absent are at higher risk of negative educational outcomes (U.S. Department of Education, 2019). According to the California School Dashboard, the 2022 data indicated a chronic absenteeism rate of 30% overall (CDE, 2022). Student subgroup data reported a rate of 42% for foster youth, 34% for ELs, and 37% for students of low socioeconomic status (CDE, 2022). The well-being of students has decreased as a result of the pandemic.

Significant historical events can impact the immediate presence of people's lives and set in motion a turning point that allows advantages or disadvantages to accumulate, thereby changing an entire life trajectory (Elder, 1998). A global research meta-analysis on the impact of the pandemic revealed that students from low socioeconomic levels fared worse in the immediate aftermath of school closures and the disruption from the pandemic (Betthäuser et al., 2023). From a life course lens, the question will be whether the short-term negative outcomes modify the long-term trajectory of children or if society

can work to mitigate the impact of the pandemic on children's lives. Initiatives such as ELOP seek to reestablish positive trajectories of children through services aimed at both academic and social–emotional learning.

Timing in Lives

The timing within a person's life of any significant event, both historical and individual in nature, impacts the overall consequence of the event. A life course can be viewed as a series of stages that happen across a lifetime. Entering into formal schooling, leaving home, marriage, retirement, etc., are viewed as transitions that change the role or identity of a person (Hutchinson, 2015). Across a lifetime, people pass through a series of significant transitions that represent a life trajectory. While not linear in form, trajectories represent a general life course direction. There are phases within the lifespan that make a person more vulnerable to negative events, which can change the direction of their trajectory. In his studies on the children of the Great Depression, Elder (1998) found that children who experienced the Depression in their younger and more formative years were more adversely affected than their older counterparts. Young children are at a developmental stage that creates vulnerability to adverse events. So, the same event can impact people differently based on a series of factors, including age.

One of the most critical transitions in life course theory is the entrance into formal schooling. The skills developed in the early years of education impact the trajectory of students in secondary school, which then impacts adult trajectories. If a child is not adjusted to the social and behavioral expectations of schooling in the first years, the child will start down a trajectory of school failure (Alexander et al., 1993). In other words, adaptation to the behavior expectations of the academic setting predicts future school

success. For example, the successful social–emotional and behavioral transition into first grade predicts later academic success and even early adulthood success (Entwisle et al., 2007; Entwisle & Hayduk, 1988). In a 2008 study on distal outcomes for first-grade students, those with behavioral problems or behavioral and academic problems combined were at significant risk for negative outcomes in sixth grade (Reinke et al., 2008). The study has implications for schools in identifying and supporting at-risk students from the first years of formal schooling. Difficulties in the first years of schooling can set a negative trajectory for students.

When the change in trajectory is based on a widespread historical event, the developmental implications can impact the entire birth cohort. Alwin and McCammon (2003) referred to a large-scale historical event that impacts the lives and trajectories of an entire birth cohort as a *cohort effect*. The goal of the ELOP funding is to recognize and address the *cohort effect* on the most vulnerable students. A study on the impact of the pandemic on school readiness in Uruguay found that the COVID cohort of students experienced losses in both motor and cognitive development. Attitudes toward learning and internalizing behaviors also negatively impacted the student cohorts. The greatest losses in school readiness were experienced by children from low socioeconomic households (González et al., 2022).

All students who were in first grade during the pandemic missed a critical transition, but those from underserved communities had the added disadvantage of missing the adjustment into a culture that often varies from their home experience. A longitudinal study of children in Baltimore public schools found that children from low socioeconomic standing were more likely to be identified by their teacher as at risk for

academic or behavioral adjustment in the school setting (Entwisle & Alexander, 1993). There is a mismatch between school culture and the home culture of many minority or underserved students, which creates a difficult adjustment to school that can establish a negative long-term trajectory. From the first day of school, underserved students already have a disadvantage.

In the elementary years, third-grade reading is another important transition that establishes an academic and life trajectory. Research indicates that reading below grade level in third grade correlates with eighth-grade achievement and high-school dropout rates (Lesnick et al., 2010). The elementary years are critical in determining students' academic and career trajectories. The academic and social-behavioral adaptation to the school environment is critical to the overall trajectory of students, but COVID disrupted the typical entrance into school life and culture. Through a life course lens, that disruption for children can potentially create a negative trajectory if not addressed.

Through the lens of the life course, students who experienced school closures and societal disruption during the lower elementary years are more vulnerable to academic and behavioral problems. Students in the elementary years missed the critical adaptation into formal schooling and the critical learning of the first years. Although all young children suffered through the disruption of the pandemic on their academic and behavioral trajectories, underserved children were most impacted.

Linked Lives

In life course theory, family and other social influences represent some ways in which people's lives are linked together, and events or circumstances can impact not only individuals but also those in their circle of relationships. Parental well-being and

decision-making, for example, can have direct and long-lasting consequences for the children in the family by providing advantages or disadvantages to the life course of the children (Elder, 1998). Historical events impact children through the linked lives and social influences of the adults in their families and communities. For example, in research on families of the Iowa Farm Crisis, it was found that economic hardship and depressed feelings in parents led to increased difficulties with mental health among children (Conger et al., 1994). Although research has yet to study the long-term impact of the pandemic on children through the linked lives of families, preliminary studies indicate the same dynamic will ensue from family stressors. A study conducted in Canada on family relationships during the COVID-19 pandemic indicated that the stressors of the pandemic were associated with increased anxiety and emotional strain due to breakdown in family relationships (Mohanty et al., 2022). Historical events that increase stress and anxiety in parents can negatively impact the lives of their children.

Linked lives are not limited to families; communities and other social circles can also influence the trajectory of the members of the group. Schools are an important element of the fabric of any community. They not only educate students in academics, but they also provide many special services for individual student needs. The U.S. Department of Education, Office for Civil Rights (2021) published a report on the early concerns regarding the negative impact of the COVID-19 pandemic on school children. Within those concerns were the loss of disability services, loss of support and language services for ELs, loss of mental health services, and a widening education gap in access for minority and low-income students. In addition to the services provided by schools, the disruption to school meals impacted the health and well-being of students. In California,

participation in school meals dropped 46% during school closures, greatly impacting food insecurity for many students (Plank et al., 2022). The closures of schools limited the schools' ability to support families and provide the services students need. The school–family link was disrupted by school closures.

The ELOP seeks to improve educational outcomes through additional services outside the school day and the school year. Through the lens of life course, the programs recognize that the schools, the community, and the students are linked; students and families need the support of the school and its community partners. The ELOP summer program provides academic support, social–emotional learning, enrichment, and nutrition daily. The state recognizes the power of linked lives by significantly extending services from the school day to afternoons and intersession days, including summer.

Human Agency

Human agency refers to how individuals can shape their own life choices and behaviors within their larger context. Although the environment and context influence trajectories, individuals are able to control some aspects of their life course trajectory through their own behavior. Some children will move beyond the impact of the pandemic through their own personal characteristics. For those students, expanded services will still add opportunities to their lives. For other students, the pandemic represents a life-changing event. Due to personal characteristics, they are more impacted by one or more aspects of the historical context.

Looking at the COVID-19 pandemic through the lens of the life course situated the research in a very particular social and historical time. The ELOP was part of California's response to the pandemic's overwhelming impact on young children's

trajectories. It is an expansion of the responsibility of school districts in the lives of families and children. It recognizes the importance of community support through the linked lives within that community. The intent of the funding and the purpose of the collaboration between organizations happened at a very significant historical time. Life course theory adds weight and significance to the collaborative efforts of the teams involved in the summer program. It provided a framework for understanding the mechanisms by which children were impacted by the historical context of the pandemic and also provided potential leverage points for mitigating that impact.

Communities of Practice

As an extension of the social theory of learning, CoP represents how people learn through participation in social circles. The combination of authentic context and social interaction creates a situated learning experience where all members of the CoP are continuously learning and negotiating meaning within the context of their various social frameworks (Lave & Wenger, 1991). In their seminal research on apprenticeship as a learning model, Lave and Wenger (1991) coined the term communities of practice in the book *Situated Learning: Legitimate Peripheral Participation*. They sought to expand the idea of apprenticeship from a learner–mentor model where information is passed from the mentor to the apprentice to one of entrance into a CoP through active participation and change in identity. The novice, or apprentice, seeks knowledge to eventually assimilate into the group, and this knowledge is gained through social interaction. In this model, learning becomes oriented to the context and to the completion of significant tasks that the CoP understands to be essential to the identity of the group.

For an individual within a CoP, personal experience combines with an understood social competence determined by society or the group itself to create community belonging. The novice teacher learns how to manage small group lessons, the novice firefighter gains experience using the hose, and a nursing student inserts an IV; each of these skills represents an initiation into a CoP. The interaction of experience and competence informs both “knowing” and “learning,” which allows for individual transformation and community growth (Wenger, 2000). Both the individual and the group change and evolve through the continued construction and negotiation of knowledge.

In their 2002 book *Cultivating Communities of Practice*, Wenger et al. expanded and clarified the theory of CoP to focus on the dynamic nature of the CoP structure and its continued evolution. Groups become CoPs and define and redefine competence when they work together to negotiate a joint enterprise through mutual engagement that results in common practices. Through this work, the CoP develops a shared repertoire that defines the community and creates belonging within the community (Wenger et al., 2002). That identity shifts as new enterprises and new practices develop. Although CoPs can take on many different forms, from clubs to schools to individual departments within an organization, all CoPs share a few common elements: the domain of knowledge, the community of participants, and shared practices (Wenger et al., 2002). Each element represents a critical lens to understand the CoP.

Domain

The domain of a CoP defines the context and boundaries of the work of the CoP. It gives meaning and purpose to the community and creates identity (Wenger et al.,

2002). In the research of this study, the CoP for each organization and for the district office is centered on the planning and implementation of the ELOP funding. The total district funding for ELOP in the 2022–2023 school year amounts to \$5.3 million. The scale of the funding creates a significant reason for the work of the CoPs, which adds validity to their existence through the significance of the domain (Wenger et al., 2002). Although the funding covers after-school and intersession enrichment for a full school year, this study centered specifically on the collaboration between the organizations and the school district CoP during the first year of planning and implementing a summer ELOP program. Within the larger domain of ELOP, the study looked at collaboration on a joint enterprise of the emergent summer program.

A joint enterprise does not mean constant agreement. On the contrary, the tension between community members requires both collaboration and negotiation to develop a common understanding and common practices (Wenger, 1998). Previous to the ELOP funding, the partnerships between the district and the three organizations existed as mutually beneficial collaborations where the organizations provided childcare for district students on school sites. Only the Boys and Girls Club had a tighter relationship through implementing an ASES program on three sites, a federal program. With the addition of ELOP funding and criteria, the relationships have become interdependent regarding implementing this specific ELOP program. The district is responsible for the funding and the adherence to compliance indicators, but the organizations run the programs.

Therefore, the task of creating the summer programs requires constant negotiation of all elements of the design. Each organization runs a program, but one negotiated and created in collaboration with the district team. Cohesion within the overall implementation plan

is centered on the grant requirements and the ELOP vision established specifically for the ELOP funding implementation, but each partnership will negotiate its own implementation of its program.

Communities

The participants in a CoP form a community that is developed and defined through mutual engagement over time (Wenger et al., 2002). Meaning is created within the CoP through mutual engagement, which includes both participation and reification. Active participation is essential to forming the community and developing social learning through shared practices. There must be coordination and synergy within the group to foster active participation (Wenger, 2000). Members must also see results and feel the value of their participation. The members of the various CoPs within this study had different participation levels as they found time and energy for the shared project. In no case does the summer program through ELOP represent the bulk of their professional duties. On the contrary, the members of the COPs are working and learning together on the ELOP project as part of their overall job. Maintaining the focus and active participation of the district CoP is an important element of the successful establishment of community. For the outside organizations, the partnership with the district in the summer program represents a large expansion of their organization's services. For these teams, there is significant motivation to work together. Learning together and developing meaning are critical to maintaining participation for all teams.

Practices

A practice refers to an accepted manner of doing something the CoP accepts as appropriate and correct (Wenger, 2000). Practices can encompass many ways in which a

CoP constructs knowledge and uses resources. As part of developing practices, many tangible objects are created that reflect the practice and the community. This common set of practices adds to the sense of community and deepens identity.

As part of the creation of common practices, reification refers to making an abstract concept tangible or real. Within the construct of CoP, reification is essential to creating meaning (Wenger, 1998). All CoPs create documents, plans, tools, data, etc., as part of their learning process. Reification can refer to the product of a CoP activity or the processes of activities developed by the group. A common registration of students is an example of a process that will need to be negotiated and implemented by the CoPs. The meaning and identity of the CoP are negotiated within the interplay between reification and participation. In the case of an emergent program, as seen in this study, all processes and group products were newly created. Reification was central to the collaboration and development of the communities.

Part of reification is the development of a shared repertoire. As the CoP works and learns together, a shared repertoire develops that identifies the community and creates identity for the members. The shared repertoire develops from a shared history together. With the planning and implementation of an emergent program, the shared repertoire must develop quickly. Routines and frameworks will be defined as needed for the implementation, so close collaboration is essential to maintain alignment with the ELOP grant and the district vision. Mutual engagement in the joint enterprise of the summer ELOP program creates meaning through the development of common practice and forms the identity of the CoPs.

Boundaries and Brokers

Each CoP forms its identity and practice around specific boundaries of practice. The limiting of the domain through boundaries allows for a strong sense of purpose for a specific CoP (Wenger et al., 2002). Despite the formation of boundaries, all CoPs interact across these boundaries in some way with other outside CoPs. In some cases, it might be that a department within an organization works with another department through documents and transactions. For example, the fiscal department in a school district works with the instructional department to purchase a new curriculum. In other situations, the boundary work is between organizations. For example, a school district works with the local library to develop a literacy campaign. In this research, the boundary is between organizations working on a common project. Each organization has its own vision and identity within the community, but there is also a need to negotiate a new vision for ELOP. The joint enterprise of creating a summer program necessitates ongoing negotiation of planning and implementation across boundaries to realize the goals of the ELOP funding.

Each outside organization has experience and expertise in providing childcare services for elementary students after school and during the summer. Their individual CoPs are focused on delivering this service well. On the other hand, the school district provides primarily academic education during a traditional school year. There is expertise in that specific field. The collaboration needed to design and implement the summer ELOP requires that each organization work at the boundary of their respective CoPs to develop an innovative program.

Boundaries can be opportunities for new and significant learning and places of possible difficulty (Wenger et al., 2002). The meeting of CoP at a boundary forces the participants to look at their practice through a different lens, presenting the possibility of deep learning and constructing new knowledge, but tension can also arise as identity is challenged by new practice. When a CoP is defined by competence and experience, new practices, as seen from contact with another CoP through a boundary, can lead to tension. That tension is resolved by constructing new learning and practices or by rejecting boundary processes. In this study, the members of the various ELOP CoPs developed bridges to connect the different systems.

Bridges across CoPs can include both boundary objects and brokering (Wenger, 1998). The boundary objects represent a reification of the connection between different communities. When a joint enterprise requires a deeply collaborative relationship across boundaries, boundary objects are created, and often, a broker facilitates the movement of learning from one CoP to the next (Wenger, 1998). Boundary objects can take many forms, such as artifacts, documents, terminology, or routines that represent a common practice that bridges the communities and negotiates their relationships. They are an explicit demonstration of the boundary work. Tacit knowledge also must cross boundaries through bridges. This implicit knowledge and practice refers to how a community works and relates together (Wenger et al., 2002). The work at the boundary becomes visible through the formation of new practices and visible through boundary objects.

When boundary work is intentionally managed and facilitated, it can lead to positive outcomes for the CoP. In a study on boundary work within research practice

partnerships between four large public school districts and university-based researchers, it was found that the differences in practice “are not ‘gaps’ to be closed but instead sociocultural differences that, if navigated via boundary infrastructure, have potential to foster organizational learning in service of educational improvement and transformation” (Farrell et al., 2022, p. 204). The boundary work included intentional communication across all CoPs, frequent opportunities for feedback, as well the connection of the research goals to district initiatives. By focusing work on constructing knowledge and understanding the boundaries of the organizations, better collaboration ensued, and knowledge moved more easily across boundaries.

In another study on moving knowledge from one community to another within an organization dedicated to the design and production of a technology product, it was found that rather than a simple transfer of knowledge from one department to another, the knowledge was transformed through situated learning as the knowledge moved through departments (Bechky, 2003). Each department within the production had a separate role, from engineers to assemblers. Those departments were often isolated from each other, but when a problem arose, and they met across CoP boundaries to solve problems, the resulting knowledge construction transformed the understanding of both CoPs involved in the boundary work. Although the study involves separate departments within a single organization, the parallel of teams who generally work in isolation coming together to construct knowledge relates to the knowledge-building structures of the CoPs in the current study. The joint enterprise in this study of a summer program was the common product resulting from the CoP collaboration and the transformation of knowledge across boundaries. In order to facilitate the boundary work, a broker can play an essential role.

Brokering refers to the movement of knowledge and practice from one CoP to another. The main actor in this movement is a broker. Wenger (1998) stated that the position of broker “involves processes of translation, coordination, and alignment between perspectives” (p. 109). The broker not only participates in both CoPs but also has the trust of both communities. The broker must also manage the tensions that emerge as the CoPs work at the boundaries of their practice. In the case of this study, the researcher acts as the broker to facilitate the construction of knowledge across teams and to ensure the alignment of the programs with the ELOP funding.

Wenger et al. (2002) recommended intentionally designing boundary work between distributed communities through activities that relieve the tension at the boundary but also develop community. The four activities included (a) developing alignment between members, (b) creating flexible structures that allow for local variation within the larger community, (c) maintaining meaningful opportunities to connect, and (d) developing relationships through engagement. The broker’s role can be seen as facilitating these activities to develop and sustain the CoP. In the current study, the four categories of activities were leveraged to develop collaboration across teams.

The boundary work is fundamental to the joint enterprise of an ELOP summer program and has the potential to lead to important innovations in practice, but crossing boundaries between organizations is difficult work. As Wenger et al. (2002) stated, “Crossing boundaries requires building trust not only inside communities but also through sustained boundary interactions. There is a definite tension between these two goals. Community development tends to turn communities within; boundary work turns it

outward” (p. 154). The successful collaboration and integration of the teams are necessary to reach the full potential of ELOP.

Innovation

The flexibility of social learning within a CoP allows for innovation within a rapidly changing environment (Wenger et al., 2002). The various lenses and perspectives of different members within the CoP create space for constructing and transferring knowledge. There is also a link to practice. Members of the CoP are in the work and learning together *in situ*.

Brown and Duguid (1991) added to the research of CoP by revealing the learning and innovation created in CoPs through the social construction of knowledge embedded within practice. Their research used previous ethnographic studies to assess how XEROX service technicians created and benefited from working together. The technicians had all received training from their organization, including manuals and documents to guide them in their professional practice, but this canonical knowledge did not always provide the flexibility to problem-solve on the job. Technicians developed informal strategies through social interactions and learning to address new problems and unique circumstances better. Through narration, collaboration, and social construction, technicians were able to innovate and solve problems encountered in their work environment. In this context, learning is inseparable from the work. As the technicians constructed knowledge and gained additional experience, “The central issue in learning is *becoming* a practitioner not learning *about* practice” (Brown & Duguid, 1991, p. 48). Their identities shift as they learn and become part of the CoP through on-the-job problem-solving.

The innovative problem-solving of the technicians analyzed by Brown and Duguid (1991) was outside the canonical knowledge of the organization. Rather than find solutions in manuals and organization-accepted protocols, “the source of the innovation lies in the interface between an organization and its environment. And the process of innovating involves actively constructing a conceptual framework, imposing it on the environment, and reflecting on their interaction” (Brown & Duguid, 1991, p. 51). The CoPs within this research designed a program within a real-world scenario. All members of the CoPs were active practitioners within the project and needed to talk together, adjust practices, and reflect on the work’s success. It is a process of design, act, and reflect.

Wenger et al. (2002) referred to a process similar to the multimember learning cycle to explain how CoPs can enhance the innovative capacities of an organization. When individual CoP members encounter a new or unknown problem, they can bring it to their CoP and problem-solve to develop a new practice for the organization. This new solution is applied in the workplace and then assessed for success and brought back to the community. This cycle of learning and applying continues indefinitely. The cyclical nature of the CoP learning embedded in practice creates flexibility within the organization and creates an environment for innovation.

CoP offers a framework for understanding how the adults within different teams work together and learn together on a common project. The work across organizations demands that each organizational team negotiate meaning and shift organizational identity to align programs to the intentions of the ELOP funding. The collaboration

within a framework of CoP leads to the construction of meaning and the potential for innovation.

Chapter Summary

This chapter described life course theory as a framework for understanding the significant historical context of the study. Viewing the impact of the COVID-19 pandemic through the lens of life course provides an understanding of how the pandemic shaped all student outcomes and, most significantly, why underserved populations fared the worst. The ELOP funding seeks to mitigate that impact on underserved populations through expanded learning services. The school district worked together with three outside organizations to plan and implement the summer program. The interorganizational collaboration provided opportunities for developing an innovative program, but it required alignment of purpose and vision. CoP provides a structure for understanding how the organizations come together to negotiate the implementation of a new initiative. The collaboration requires the development of community and new practices that align with the intention of the ELOP funding.

CHAPTER 3

METHODS

The purpose of this multiple case study was to closely examine the collaborative relationship between a K–12 school district and three outside organizations in the development of a summer program for underserved students. Simi Valley Unified School District worked in cooperation with the local YMCA, Boys and Girls Club, and RSRPD to develop and implement multiple summer opportunities for underserved students using funding through the state of California’s ELOP. The intent of the ELOP funding is to address the disproportionate impact of the COVID-19 pandemic on the academic trajectory and social–emotional well-being of underserved populations defined in this funding stream as students from low socioeconomic households, ELs, and foster youth.

Two theories guided the study and provided a frame for the research: life course theory and CoPs. As seen in previous chapters, the COVID-19 pandemic disproportionately impacted underserved populations in metrics related to academics and social–emotional well-being. Life course theory provided context for how and why the disruption in elementary education impacted all children and most significantly impacted the educational trajectories of underserved populations. Life course also predicted potential long-term negative outcomes if those negative trajectories continued. Finally, life course theory described the power of community in mitigating some of the negative impacts of historical and environmental contexts. The theory of CoP framed adult learning and collaboration in developing an emergent program. The individual organizations and the school district each had their own CoP that reflected the organization’s vision and culture. The summer program required that the distinct CoPs

come together to establish new practices and a new vision that reflected the intention of the ELOP funding. Specifically, the study sought to answer the following research question and subquestions:

Research Question 1: How do team members from different organizations negotiate the development of a viable plan for implementing a new initiative?

- a) What new practices develop as they work together on a shared project?
- b) What competencies from their previous domains support or obstruct new practice development?
- c) How do the new practices align with the shared goal of the initiative to mitigate the impact of COVID through expanded learning services?
- d) How does the broker's role support or obstruct community development?

Chapter 3 continues the conversation about the study by explaining the rationale for the research methods. First, the methodology and research design are described and connected to the study. Next, a description of the specific context is outlined, including the participants, setting, and the role of the researcher. From there, the study procedures, data collection, and data analysis process are summarized. The chapter ends with ethical considerations and a summary.

Research Methodology and Design

Action Research

The following section describes the methodology of the current cycle of an action research study. Action research is a systematic and cyclical model of inquiry where the practitioner also serves as the researcher to solve a practical problem embedded in the local context (Creswell & Guetterman, 2019). The endeavor to influence one's own

practice through research and action empowers scholarly practitioners to understand their influence on the context in which they practice (Herr & Anderson, 2005; Ivankova, 2013). Action research represents a systematic process designed to improve practice as the researcher critically explores an aspect of his or her practice in depth. The focus on developing and implementing an action plan through a process of planning, acting, observing, and reflecting serves as an important tool for implementing desired change (Ivankova, 2013). In this multiple case study, ELOP represents a completely new initiative not only for the school district but also for California. It greatly increases the scale of public school programs, making it often necessary to work with outside organizations. Therefore, the close collaborative relationship between school districts and partner organizations was essential to the success of ELOP services.

A detailed examination of these collaborative relationships between the district and outside organizations for the summer launch provided valuable information moving forward in subsequent collaborative cycles. The study sought to gain a deep knowledge of the collaboration process so that this process could be improved and refined. The cycle of action research inquiry continues without end as the scholarly practitioner addresses iterations of the same problem of practice or moves to a different strand of practice.

Qualitative Research

ELOP funding represented a new state initiative that greatly expanded student services across all public school districts in California. At the time of the study, there was still no compliance handbook to clarify the law, leaving county offices of education and individual districts to develop plans with little official guidance. As seen in previous chapters, the pandemic created many additional student needs, both academic and social–

emotional. The postpandemic educational context and the new funding potential created a need for the adults within and between organizations to collaborate in new ways and improve their problem-solving skills to address a dynamic set of student needs within a new funding context. It is a very complex environment, and a qualitative study best aligns with the purpose of this research, which is an in-depth look into the development of interorganizational collaboration on an emergent program.

Although the school district had collaborated with the three outside organizations in the past, the ELOP funding required a much deeper collaborative relationship. Previous to the study, two of the outside organizations provided childcare services to students and families on the district's school site. The relationship was mutually beneficial, but each organization ran its business model according to its individual vision. The Boys and Girls Club had childcare services at their Clubhouse, but the organization collaborated more deeply with the district through the ASES program on three sites. This state grant has some similar components to ELOP, but it is much more limited. With ELOP, the relationship moved to a more codependent model where it is necessary for the organizations and the district to come to a common agreement on services and to modify practices and vision to develop a single cohesive program aligned with ELOP.

This cross-organizational collaboration involving a new initiative is a complex phenomenon involving the multiple experiences of the participants and their organizations within a specific environment. Where quantitative research attempts to understand trends across a broad section of the population, qualitative research is designed to go in-depth on a smaller sample population to understand the human experience (Bhattacharya, 2017; Givens, 2008). Qualitative methods allow for a deep

exploration of the nuances of a complex phenomenon (Creswell & Poth, 2018).

Understanding how the people within the organization process and implement the change in practice through a collaborative model was important to guide that change in a positive trajectory. As Givens (2008) stated, a central purpose of qualitative research is “to capture individuals’ thoughts, feelings, or interpretations of meaning and process” (p. 522). Each individual and the organizations’ CoPs interact within the context to develop and implement a plan for the emergent program.

Case Study

A case study is an ideal research approach for studying in-depth how a system of people experience and interact with a complex environment (Plano Clark & Creswell, 2015; Yin, 2018). Case study is differentiated from other forms of research based on the focus on a central phenomenon, which is a bounded system. The central phenomenon represents the case or the specific focus of the research. The bounded system indicates that there are boundaries around the parameters of the case. In this study, there was a clear time frame and a clear definition of participants. The case study was bound by the planning and implementation cycle of a summer program, and the participants included only those members of the three organizations and the school district involved in the planning and implementation of the ELOP summer services. The case focused on the three organizations’ collaboration with the school district around the 2023 summer program using ELOP funding.

A case study also includes collecting and integrating a wide variety of data. Yin (2018) identified six types of data often included in case study research: documentation, archival records, interviews, direct observations, participant observations, and physical

artifacts. By casting a wide net for collecting data, the researcher can construct a thorough understanding of the case. In contrast to quantitative data that attempts to limit the contextual environment, qualitative research and a case study integrate the historical or environmental context into the understanding of the case.

Multiple Case Study

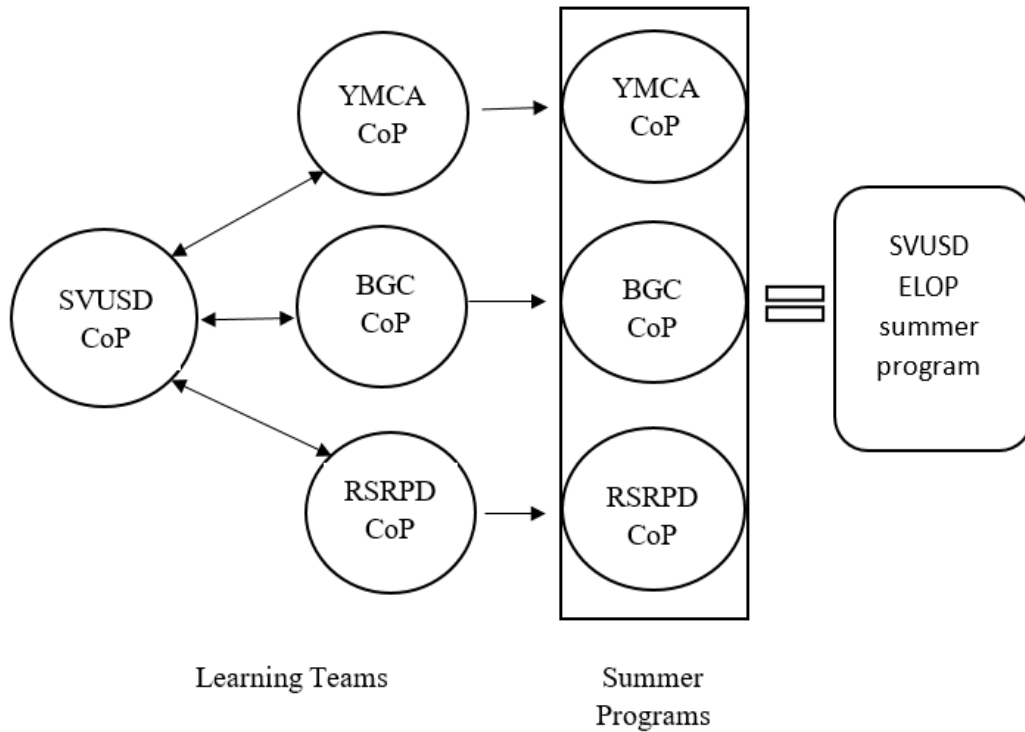
Stake (2005) argued that an important part of multiple case studies is to discover how the phenomena develop in various environments. It is the exploration of the phenomena in different contexts that add to a broader understanding of the case. In order to design a multiple case study, the researcher must find the issues that the cases have in common to then study how they are similar and how they differ. In this case study, the research examined the collaboration across three separate cases to make some assertions about the collaborative process.

Based on the structure of the collaboration between the three outside organizations and the school district, a multiple-case study approach best served the purpose of the study. As reflected in Figure 1, the district CoP worked with each organization's CoP separately. Each dyad, district–organization, represented a unit of study of cross-organizational collaboration. I was the broker who moved information across the boundaries to facilitate collaboration and learning. Each dyad learned and constructed knowledge together. Based on the collaboration, the organizations developed a summer program that aligned with the common ELOP vision. The programs were influenced and financed by the school district and its CoP, but the program was offered through the organizations; therefore, arrows led in one direction from the CoP organization to the program. The three programs together represented the ELOP offerings

for the district. Due to this implementation structure, effective collaboration and learning were essential to the outcome of the work.

Figure 1

Schematic of the Multiple Case Study



When the purpose of the case study is to understand an issue or problem better and then generalize the assertions for other cases, it is referred to as instrumental (Stake, 2005). Stake (2005) continued to point out that the researcher’s interest in an instrumental case is on the issue of the case rather than on the particular case itself. The research in this study sought to understand the collaboration between the district and three outside organizations for a summer program, but the larger interest was to understand how collaboration and learning develop in an emergent program. ELOP funding covers not

only summer but also after-school services and spring break services. There may also be additional organizations that host the district's programs. The results of this research informed additional cycles of collaborative work.

For this research study, case study and, specifically, multiple case study best aligned with the purpose of the research. There was a need for an in-depth study of new and dynamic phenomena. The complexities involved in collaboration across organizations in a complex environment necessitate an extended and close look at the process and perspectives of the joint enterprise. Each organization and their work with the school district represented a single case. By studying multiple cases, a more comprehensive understanding of the collaboration process emerged.

Setting and Participants

The summer ELOP program consisted of various sites and services offered through three outside organizations in collaboration with the Simi Valley Unified School District. The summer programs included full-day activities that fulfilled the ELOP funding requirements, and various program sites were spread throughout the city. The specific focus and structure of each organization's program were based on collaboration with the school district and the organization's capacity. Each organization provided four to five weeks of program services during the 2023 summer break. Based on ELOP criteria, 4017 district students in transitional kindergarten (TK) through sixth grade were eligible to participate. The actual participation was based on student and family choice and program capacity.

The participants in the case study included members of the three organizations' summer planning and implementation teams and the district ELOP team. Each of the

three organizations represented its own CoP, as did the district team. Peripheral team membership fluctuated as the school year moved into summer and people took time off work, but all team members were considered participants. The interviews included participants from each CoP who were highly involved in the planning and implementing the summer programs. Patton (2015) referred to a practice in qualitative research where the researcher intentionally chooses a *purposeful sampling* based on participants' deep knowledge of the central phenomenon. Focusing interviews on selected participants with high levels of knowledge of the research topic leads to richer data (Creswell & Poth, 2018; Stake, 2005). For this study, a smaller subset of the participant group was chosen to participate in the interviews. This purposeful sampling consisted of core members of each organization who had knowledge of both the organization and were part of the decision-making process in developing the ELOP summer planning and implementation.

Role of the Researcher

As the assistant director of early and expanded learning, I was responsible for the ELOP program for the Simi Valley Unified School District. It was my responsibility to develop and implement all aspects of the ELOP funding, including the launch of the summer program in 2023. To assist with the new initiative, I searched out and organized collaboration with three outside organizations and formed an internal ELOP team consisting of district employees. I was an integral part of every aspect of the program.

Previous to the launch of the summer program, the school district worked with all three organizations to implement a pilot after-school program through ELOP. During the spring semester, ELOP services were established on elementary sites through the pilot.

This collaboration precedes the study, so relationships among the dyads were established. Procedures were put in place to mitigate any bias, as described in the following sections.

Within this case study, I was an active participant in all teams. My primary role was as a broker between the individual organizational teams and the district team. Wenger (1998) defined brokering as the “use of multimembership to transfer some element of one practice to another” (p. 108). As the broker, I was coconstructing knowledge with all CoPs and facilitating collaboration between each organization and the district team. I had to understand the perspectives and past practices of each group and then work to move learning and practice across the boundaries of each organization and the school district to reach the common goal of the initiative. The study was done through the lens of the broker. The broker’s role allowed me full access to each case, but it also presented the potential for bias. I carefully considered maintaining a neutral stance regarding the data collection and analysis to mitigate my personal bias. A researcher’s journal was kept as part of the data collection. It represented one piece of a large body of data. Triangulation, as described in the next section, was important to check my own understanding of data sources.

Study Procedures and Data Collection

The study involved in this research had two natural sections for procedures and collection of data: the planning of the programs and the implementation of the programs. The collaboration and knowledge-building shifted as the work moved from planning to actual implementation. Therefore, the activities around collaboration and knowledge construction changed from building and designing programs to implementing and adjusting those programs. Participants also shifted across the time sequences as the

school district moved into summer break. Many participants in the district CoP took a vacation before the implementation phase. Although the change in participants was inconvenient for the study, it represented a reality in developing a summer program through a public school district. It is an important consideration in how the collaboration was managed and was part of the study. In order to present a clearer and more comprehensive picture of the process, data collection was first separated by these two time periods.

Quality qualitative research, including a case study, requires that the researcher collect a wide range of data to ensure that the complexity of the central phenomenon is realized and described in detail (Creswell & Poth, 2018; Plano Clark & Creswell, 2015; Yin, 2018). Although the types of data collected may vary across case studies, Yin (2018) named the six most common as previously outlined. For this study, the primary categories of evidence were documentation, interviews, and observations. Multiple sources of evidence converged to form themes within the line of inquiry (Yin, 2018). This process can be referred to as triangulation of data. Stake (2005) described the purpose of triangulation as an assurance “that we have the picture as clear and suitably meaningful as we can get it, relatively free from our own biases” (p. 77). Patton (2015) argued that triangulation is an important process not just with data sources but also with investigators, with theory, and with methods. All aspects of the study included this convergence of ideas and actions.

Documentation

This research study included the examination of various documents throughout the research process. These documents included email communication between

participants, meeting agendas and minutes, memorandums of understanding, training materials and activities, and journal entries. As Bhattacharya (2017) asserted, documents provide a rich contextual knowledge of the issue within the study, but it is also important that the researcher consider their positionality and what documents will best serve the purpose of the study. The documentation served to provide evidence of the negotiation between the organizations and the school district to develop and implement the summer programs.

Semistructured Interviews

Semistructured interviews with a purposeful sample of each CoP occurred after the planning and implementation phases. Interviews provide in-depth information about the perspectives and experiences of the participants, making this source of data critical to quality case study research (Yin, 2018). The craft of interviewing requires that the researcher plan the interaction through an interview protocol that focuses responses on the study's research questions (Creswell & Poth, 2018). At the same time, a semistructured interview protocol allows for probing and follow-up questions to explore participant knowledge while allowing for new and relevant directions of conversation (Bhattacharya, 2017; Ivankova, 2013). The individual interviews in this study included participants from each CoP for each time period, planning, and implementation. The open-ended questions pertained to the research question and subquestions, allowing the interviewee to express ideas and issues not considered in the original research plan. For example, one question read, "In what ways has ELOP changed your regular summer programming?" The full list of interview questions can be found in Appendix A. Probing and follow-up questions formed part of the interview plan to allow new issues to arise.

Observations

Direct observations provide important case study information because of the contextual and environmental importance of the case study approach (Yin, 2018). The use of an observation instrument or protocol can assist in focusing the process on the research purpose (Creswell & Poth, 2018; Yin, 2018). Bhattacharya (2017) recommended, as a first step in the observational protocol, to create a quick map of the space, including objects and participants. Stake (1995) emphasized that all aspects of the context, including the physical and any important contextual information, should be noted by the researcher during observations. The observation protocol should also include both observations related to the purpose of the study and reflective entries to understand the environment better (Creswell & Poth, 2018). An example of the observation protocol can be found in Appendix B. In this study, observations occurred at the program sites as leadership interacted with other staff.

Data Analysis

The work of analyzing the large quantity of data necessary for a complete analysis in a qualitative study involves an approach where the researcher attempts to reduce the volume of data by organizing it into categories and themes that reveal the central phenomenon (Ivankova, 2013; Mertler, 2019). The researcher plays an active role in determining the themes in a deductive or inductive approach (Braun & Clarke, 2012). Therefore, qualitative data analysis is an interpretive process that cannot be separated from the researcher's lens (Plano Clark & Creswell, 2015). The data is generally analyzed throughout the study in a simultaneous and iterative process. The researcher collects and analyzes data throughout the study and then checks it with previous data to

rework analysis areas and refine themes. It is a very different process from quantitative research, where a hypothesis is established, data are collected, and finally, data are analyzed to test the hypothesis.

Steps in Thematic Data Analysis. Qualitative data analysis follows a series of steps that allow the researcher to work through the data systematically. These steps include (a) data preparation, (b) data exploration, (c) data coding, (d) theme development, and (e) validation of findings (Plano Clark & Creswell, 2015). The simultaneous and iterative characteristics of qualitative analysis mean that all five steps occur throughout the study as new data are collected and analyzed. The data collection and analysis continue until saturation when there is sufficient evidence to establish and validate findings.

Preparation of the Data. The first step in analysis is to prepare the data collected in the study. The researcher collects data in raw form and then must organize and process it so that it can be analyzed. LeCompte (2000) referred to a process of “tidying up” the data by developing an organizational plan to file, sort, label, and catalog the data. In this study, a digital database was created to organize and document all data within a central location. The database included the raw data and the data source, the type of data, dates and times of collection, participant references, and connection to research questions. Organizing data made it more accessible and retrievable throughout the study. It also contributes to construct validity by maintaining a trail of evidence for all findings (Yin, 2018). Another important aspect of data preparation is the transcription of interviews. Interviews for this study were recorded and transcribed so that the exact thoughts and experiences of the participants could be included in the analysis. The researcher must also

consider how to manage data at this initial step to ensure that all information remains secure (Creswell & Poth, 2018). As discussed in later sections, the data was stored in encrypted files through Arizona State University. Once all data were organized and prepared, the analysis could continue.

Exploration of the Data. The next step in the process of data analysis is an exploration of the raw data. The researcher reads the raw data various times to record an initial sense of the data and to reflect on the various meanings within that data (Ivankova, 2013). At this step, the researcher includes written memos about possible categories and themes and ways in which to organize the data further. The memos can lead to initial coding ideas. The researcher also determines if more data is needed to clarify ideas or pursue a new line of thinking (Plano Clark & Creswell, 2015). LeCompte (2000) also recommended reviewing the data in reference to the research questions, identifying holes in answering those questions, and planning for further data collection as part of the initial immersion in the data.

Coding the Data. The third step in qualitative data analysis is to begin coding the data into meaningful ideas. After having explored the data, the researcher begins to develop specific codes to assign meaning to the data. The codes can be emergent, developed directly from the data, or predetermined based on a theoretical framework (Ivankova, 2013). Coding that develops from the participants' exact words is referred to as *in vivo coding*. Ivankova (2013) commented that *in vivo coding* is a valuable strategy in action research because it gives voice to the exact experience of the participants. For this study, codes were developed using both emergent and predetermined codes. Some codes fit into CoP as a central theory guiding the study, while others emerged directly

from the data. This strategy focused the data analysis on the research questions framed around CoPs but allowed for new lines of analysis to emerge that complemented the study's purpose. To facilitate the process, a first pass of the data looked for codes about the research questions in a deductive approach. A second pass looked for any new codes in an inductive approach.

A codebook was created for this research. The development of a codebook is an essential organizational step in qualitative data analysis. A codebook generally contains information on the coding process that improves coding consistency across data by defining codes and creating boundaries between codes. Creswell and Poth (2018) recommended that a codebook include (a) the name of the code and a shortened form, (b) a description of the code, including boundaries, and (c) a textual example of the code using data from the research. Due to the iterative and simultaneous nature of qualitative data analysis, the coding process continued throughout the study, and the codebook continued to evolve according to the addition of new data and new thinking. The codebook used in the study is available in Appendix C.

In this study, the codebook included both theory-driven codes and data-driven codes. Theory-driven codes were based on CoPs, as reflected in the research questions. These theory-driven codes were initially defined at the start of the study and refined throughout. Data-driven codes emerge from the data. DeCuir-Gunby et al. (2010) presented three steps in theory-driven code data: (a) create codes based on the theory, (b) review and revise the codes based on the data, and (c) determine the utility and the reliability of the code. On the other hand, data-driven codes require four steps to develop

accurate codes: (a) reduce the data to smaller units, (b) identify themes across data, (c) compare and refine themes, and (d) determine the utility and reliability of the codes.

Development of Themes. Qualitative data analysis takes apart raw data and then reassembles it into meaningful ideas in the form of themes and findings (Ivankova, 2013). A constant comparative method that describes a process of comparing new data segments to previous data and codes in an interactive manner was used to develop themes throughout the study (Strauss & Corbin, 1998). This iterative process also allowed the researcher to find the data saturation point (Ivankova, 2013).

The development of themes requires that the researcher abstract central ideas from the data in an interpretive process (Creswell & Poth, 2018). In thematic analysis, Braun and Clarke (2012) outlined three phases in developing themes. The first is to search for the theme by reviewing coded data, clustering the data into preliminary themes, and then reviewing the relationship between themes to see if there is cohesion in the overall story of the research. The next phase is to review the potential themes against the coded data for validity and utility. At this point, the researcher may combine or split themes and then review them across the entire data set. Finally, the researcher defines and names the themes. The themes should be unique and specific as they will shape the final analysis. In this phase, the researcher also chooses excerpts that best reveal the theme for the reader. In a later book, Braun and Clarke (2021) included reflexivity in the process of thematic analysis. Critical reflection throughout the research process regarding research decisions promoted stronger qualitative analysis. For this study, theory-driven themes sought to answer the research questions framed around CoPs, while data-driven themes

emerged from the data. Many reflexive strategies were also included in the analysis, as discussed in the following sections.

Validation. Due to the interpretive nature of qualitative data analysis, it is critical that the researcher validate findings to ensure that the researcher's assertions are not biased. Several strategies were used in this study to validate findings. First, as mentioned in an earlier section, triangulation of data was used to validate themes across sources. By using various sources to describe a common theme, the researcher enhances the validity of the finding (Creswell & Poth, 2018). Member checking was another important validation strategy used in this study. Participants were asked if the findings reflected their views. This process allowed the participants to check and validate the analysis. Another strategy was to ask a colleague to provide feedback on my analysis and coding process (Stake, 2005).

Multiple Case Analysis

A case study requires both within-case analysis and across-case analysis to complete the picture of the central phenomenon (Stake, 2005). Each case was analyzed as a single unit of study. Themes and assertions were developed within each case to provide the reader with a clear picture of that particular case and the context to which it belongs. From there, an analysis of the significant themes across cases was analyzed to understand the central phenomenon across various contexts. Stake (2005) recommended a process of sorting and merging findings and sorting and ranking findings to make final assertions across cases.

Ethical Considerations

All participants involved in the study were provided information as to the nature of the study and participated voluntarily. The researcher gathered signed informed consent from all participants before collecting any data. In addition, before any observation or interview, participants were again informed of the study's purpose and how their participation would be used in the final study. Participants were identified with a pseudonym in all data collected. A key with names and pseudonyms was located in a secure file apart from the data to further protect the identity of participants. Data was stored in an encrypted file through Arizona State University's Dropbox and was available only to the researcher to maintain confidentiality. Approval for the study was obtained through the Arizona State University's (ASU) Institutional Review Board (IRB).

Chapter Summary

This chapter described the study methods, including the rationale for the methodology and the research design. A qualitative case study was utilized to closely examine the collaborative negotiation of a new initiative for a summer program for underserved students funded by the state of California's ELOP. The data included documents, interviews, focus groups, and field notes. The chapter ended with a description of the data analysis and ethical considerations of the study.

CHAPTER 4

RESULTS

The purpose of this qualitative multiple case study was to examine how team members from different organizations negotiate a viable plan for implementing a new initiative. In the summer of 2023, Simi Valley Unified School District (SVUSD), in partnership with three outside organizations, developed and implemented a series of summer programming for underserved SVUSD students in TK through sixth grade. The initiative leveraged new funding through the ELOP, a state program intended to mitigate the negative impact of the COVID-19 pandemic by providing services to underserved youth outside of the traditional school day.

This chapter presents the study's results with data collected through interviews, a researcher's notebook, observations, emails, and multiple documents, including archival documents. All participants are presented with pseudonyms to protect their identity. The partnership between the school district and each organization is first presented as an individual case framed around three themes. Then, a cross-case analysis is presented, comparing the three themes across all three organizations. The results address the following research question and subquestions:

Research Question 1: How do team members from different organizations negotiate the development of a viable plan for implementing a new initiative?

- a) What new practices develop as they work together on a shared project?
- b) What competencies from their previous domains support or obstruct new practice development?

- c) How do the new practices align with the shared goal of the initiative to mitigate the impact of COVID through expanded learning services?
- d) How does the broker's role support or obstruct community development?

Within Case Findings

Case 1: Boys and Girls Club

Organization Background

The national Boys and Girls Club (BGC) is committed to serving the youth in the community through a wide range of programs and services aimed at improving the lives of its members. The national organization has a rich history of over 160 years, consistently serving as a community organization dedicated to providing youth with structured activities and fostering character development with a particular focus on low-income students (Boys and Girls Club of America, n.d.). Despite evolving over time to include more inclusive practices, the fundamental purpose of the organization has remained constant. Local BGCs continue that central mission, adapting it slightly to the context of the community it serves.

The mission of the local club associated with this study closely aligns with the national organization's overarching mission, both sharing a common dedication to supporting young people to thrive. The mission of the Boys and Girls Club of Moorpark and Simi Valley is to provide a year-round, positive, safe, healthy, enjoyable, and educational environment that empowers and inspires all young people to achieve their full potential as productive, compassionate, and responsible citizens (Boys and Girls Club of Moorpark and Simi Valley, n.d.). The purpose statement continues by outlining the five core activities provided to realize the mission: (a) character and leadership

development, (b) education and career development, (c) sports, fitness, and recreation, (d) health and life skills, and (e) the arts (Boys and Girls Club of Moorpark and Simi Valley, n.d.).

As described in Chapter 1, the BGC had partnered with the school district to implement a federal grant serving high-poverty schools, ASES, since the 2006–2007 school year. ASES provides after-school academics and enrichment on three district campuses. Although ASES and ELOP have different funding sources and different compliance indicators, the state allows the programs to operate as one cohesive program; therefore, many of the ASES students joined the ELOP summer programs.

The ELOP summer planning team primarily consisted of the BGC chief operating officer (COO), the director of operations, and the education director. Site personnel were added to the CoP for the implementation of the program. Meetings between the district and the BGC were held as needed throughout the planning stage. Although the BGC has traditionally offered summer day camps at their Clubhouse, the ELOP funding increased the number of student participants and also shifted programming to include additional academics, enrichment, social–emotional learning, field trips, and nutrition.

Specifically, the BGC provided ELOP summer services at their Clubhouse during two separate summer sessions. The first session spanned 4 weeks and offered a comprehensive full-day summer camp experience. This included activities such as games, art, social–emotional learning, academic enrichment, swimming, field trips, and other traditional camp activities. The second session catered to students attending morning summer school. These students were transported by van from the local summer school location to the Clubhouse for an afternoon camp. Half-day students in this session also

participated in the same activities mentioned above but on a more condensed schedule. In total, 166 students were served across both sessions.

Both sessions were open to ELOP students and non-ELOP students whose participation was paid by their families. ELOP funding covered the entire student experience for qualifying participants. This included enrollment and session fees, field trips, nutrition, curriculum, staff training, equipment, and materials. Although certain aspects of the funding, such as fees and field trips, were specific to qualifying students, other participants could benefit from expenses like curriculum, staff training, and on-site field trips without violating state compliance indicators. Table 4 provides major findings for the BGC.

Table 4

Major Findings: Boys and Girls Club

Themes	Related Subthemes	Assertions
Theme 1: Development of a Common Vision	<ol style="list-style-type: none"> 1. Purpose of the organization 2. Populations served by the organization 3. Previous competency with direct services 	The alignment of the BGC’s mission, combined with their previous competency with direct services for underserved populations, facilitated the formation of a common vision for ELOP services.
Theme 2: Development of New Practices	<ol style="list-style-type: none"> 1. Problem-solving 2. Increased workload 3. Time-pressure 4. Meaning-making 	The new practices necessitated extra work over a short time period, but the BGC managed the tension by focusing on the value of the ELOP services for families.
Theme 3: Alignment of Implementation With ELOP Criteria	<ol style="list-style-type: none"> 1. Managing challenges 2. New identity of staff 	The BGC managed challenges and developed an identity as an ELOP provider.

Theme 1: Development of a Common Vision

Purpose Statements. Establishing a common vision for the ELOP services was facilitated by the fact that the mission of the BGC parallels the purpose of ELOP. The BGC mission aligns closely with the definition and description of ELOP in Assembly Bill 130, which reads:

The Expanded Learning Opportunities Program (ELOP) provides funding for after-school and summer school enrichment programs for transitional kindergarten through sixth grade. ‘Expanded learning’ means before school, after school, summer, or intersession learning programs that focus on developing the academic, social, emotional, and physical needs and interests of pupils through hands-on, engaging learning experiences. It is the intent of the Legislature that expanded learning programs are pupil-centered, results-driven, include community partners, and complement, but do not replicate, learning activities in the regular school day and school year. (California State Assembly, 2021)

Table 5 describes the alignment between the five core activities in the BGC mission and the ELOP description.

Table 5

Boys and Girls Club Mission and ELOP Parameters

Boys and Girls Club	Expanded Learning Opportunities
Character and Leadership	Social Emotional Learning
Education and Career	Academics
Sports and Fitness	Physical Needs and Interests
Health and Life Skills	Social–Emotional Learning and Physical Needs
Arts	Enrichment

This natural alignment of purpose statements meant that both organizations easily developed a common understanding of programming. The BGC immediately felt that ELOP provided them with an opportunity to extend their existing programming and

improve their offerings to the community through additional funds. When asked if he felt the mission of the BGC aligned well with the ELOP vision, Edgar, the chief operating officer of the BGC, stated, “I do. I think it really kind of enhances and allows us to provide more types of programs and services.” He described his excitement about continuing the mission of the BGC with additional funds that allowed the organization to improve its current offerings and to serve more students. He commented, “What it [ELOP] does in terms of enhancing the programs is it really allows us to bring in supplemental activities that we don’t necessarily have the budget for.” He referred to the addition of ELOP as a “great evolution” for the organization in terms of community impact.

Previous Competency. In addition to the alignment of visions, the BGC entered the collaborative partnership around ELOP with experience in providing direct services to underserved students through a state-funded program. The previous experience with direct services similar to ELOP facilitated the formation of a common vision for the program. Beginning in the 2006–2007 school year, the BGC partnered with the school district to implement ASES at three school sites, as previously mentioned. The state program is a competitive grant awarded to high-poverty schools to provide productive and safe after-school enrichment programs. The program partners with school districts and community organizations to provide services. The school district is responsible for compliance with state grant criteria, but the outside organization operates the program as an independent entity. The collaboration dynamic mirrors the dynamic of ELOP. Edgar stated, “I think the biggest thing that ASES has done for us is give us a template format in terms of direct services.” Previous experience providing student services in collaboration

with the district through state funding aided the process of developing a common ELOP vision. The BGC team knew how to work in that environment and serve a particular subset of the community.

The experience with ASES and the BGC's core mission provided experience and competency in working with underserved students and families. Throughout the interview, Edgar mentioned how the BGC adjusted logistics and programs to the needs of the community served through ELOP. For example, he described that during a public library day at the summer camp, there were many supports to assist families with opening a library card and checking out books. For example, the BGC had bilingual staff at pick-up to assist parents in opening a library card in the moment. Books were available for checkout at the campsite, making the process quick and accessible. It was not necessary for parents to take additional time to complete the process. Photos from the event show various tables with leveled book choices and a portable checkout device managed by a library employee. The intentional staffing and supportive process removed obstacles to checking out books through the public library. The partnership with the library included various "Library Days" at the Clubhouse during the ELOP summer session to allow for easy access to books. The Clubhouse also provided silent reading time during the day to encourage students to read. The experience of the BGC with underserved populations helped them design a program that aligned with the ELOP vision to serve this target population.

In the interview, Edgar also talked about simplifying the initial registration process to make it more accessible to families. The district and the BGC negotiated a simple Google form for the initial registration that could easily be accessed on a cell

phone through a QR code. The form only provided initial information needed to confirm eligibility for ELOP and basic contact information. Throughout the planning stage, meeting notes indicated that the district-BGC team felt that the ease of first contact would allow for more access. From there, the BGC contacted families and had them come into the Clubhouse to register in person with the additional contact information. In the interview, Edgar reflected that this negotiated process provided the district with important information, but the in-person registration allowed his organization to support parents through the longer process of paperwork. This registration practice mirrored the process for registering for ASES. Both services provide in-person, supported registration for parents. He felt that his organization had the experience and competence to work with the underserved population, particularly in terms of providing access. He stated that the experience with ASES assisted with meeting the purpose and vision of ELOP, “Really, now that we have an understanding of what works, what doesn’t work, and what families need, it really allows us the flexibility and the creativity to really plan some really key programs.”

The alignment between the mission of the BGC and the state’s definition of ELOP, as expressed in law, combined with the previous competency the BGC gained through the implementation of ASES, allowed for a natural alignment of vision across both organizations for the development of the summer ELOP programming. The BGC leadership felt competent and experienced with the targeted population and understood the purpose of ELOP funding. Additionally, collaborative relationships were already established between the district and the BGC through ASES. Therefore, the negotiation of a common vision occurred easily and without tension. The BGC viewed ELOP as a

positive opportunity to further their organization's goals and mission to serve the needs of underserved populations through high-quality programs.

Theme 2: Development of New Practices

Although the challenges of planning and implementing an emergent program required negotiation and problem-solving in the organization and the district, the BGC team always returned their thinking to the organization's mission and how ELOP allowed them to improve and expand services. A number of logistical issues created challenges for the program's implementation, as seen in the data from the collaboration with the BGC. For the BGC, the challenges with new practices primarily involved the logistics of greatly expanding the number of summer students and adding additional enrichment through field trips.

Additional Participants. The expansion and change in programming required a rethinking of the space at the Clubhouse for the summer program. Adding students required additional personnel and a change to groupings and activities of the camp day.

Edgar, the COO, described the problem-solving with his team and stated:

There was no brick wall, without a doubt. I mean, it was more like, how do we make this happen? Logistically, I can tell you that my director of ops and my education director were, you know, I think they see day-to-day operations, and so they look at this like, "Well, where are we going to put everybody?"

Edgar reframed the issue for the team to see the challenge in a different light to focus on the value of the ELOP program and the benefits for the families. He stated:

I think the challenge for me was not really so much like where are we going to put them? But how are we going to find somewhere to put them? You know, really shifting the mindset to, "Wow! What a great opportunity that we have to serve this many more students." And we get to provide this to them, not to just the students we have, but you know, we can provide a service to families and we're just filling a gap that's a need.

The organization's openness to family needs, regardless of the challenges presented, was evident when a family with six children, four of whom were in special education, contacted our district interpreters. The children receiving special education services were enrolled in special education summer school (ESY) outside the ELOP dates, but the family wanted services for all six during the same session. Although I knew we were already past capacity and the dates did not match, I called the BGC to see if they could accommodate the students. In the researcher's notebook, I wrote:

The interpreters contacted me today. There is a family with [six] children. Four are SPED. They qualify for ELOP and would like a summer plan. The interpreters were able to get the four into ESY, but Mom would like a plan for all [six]. BGC is willing to take all [six] for the time period of ESY. Two will go all day and the four SPED will be dropped off by transportation for afternoon camp. I was not surprised that BGC is willing to take them, but I am so appreciative. It was a big ask.

Despite the challenge of accommodating six children at the last minute for dates not covered by the regular session, Edgar found a way to accommodate the family's needs.

Technology Challenges. Eligibility checks combined with registration posed another logistical challenge. The existing technology infrastructure for registration in the BGC did not accommodate the ELOP students who would be funded through the district. This was due to the incapability of the BGC software to charge an outside agency for the registration. The solution negotiated by the district and the BGC was to bypass the regular software and register students by hand after checking with the district for eligibility. It added extra work for the office staff, but Edgar approached the problem-solving in terms of what would work best for the families the Clubhouse serves. He said:

We have to make sure that we have all of the elements to get the student enrolled, but it's also really about making sure that we understand the importance and the value of ELOP, and I think we're all on the same page with that.

When encountering challenges and negotiating change, Edgar focused on the value of the project and service to the underserved population. The common mission of serving the community framed the extra work of establishing a new program.

An email communication between the researcher and the office manager at the BGC concerning an eligible family provides additional data concerning how the BGC supported ELOP parents and guardians. The office manager, Sarah, and the researcher exchanged emails regarding a guardian who struggled with the registration process. Sarah writes the researcher to clarify an issue. She stated:

Hi April, I reviewed the Summer Camp list first thing this morning. I called (student's) Grandma to let her know that she was on the list since I know she was waiting and stressed out and everything was set since she had come in and already did paperwork beforehand. I just came back from lunch and checked the list and she was moved to the Summer School wait list. She is not doing Summer School and I verified that with Grandma. I have already contacted her to let her know she was all set. Please clarify with me.

The researcher addressed the issue with a follow-up email and said:

I spoke with Grandma. She was indeed stressed out. She wasn't sure if she was registered. I suggested she fill out the form just in case. She may have checked the wrong box on the form. I didn't move her from anywhere. I'm working with Edgar tomorrow morning, we can chat for a minute if you are available.

The exchange demonstrated an understanding of the difficulties that many underserved populations experience and the support that the BGC provides when these situations arise. The office manager recognized the family's need for services and the stress that the situation created. She assisted with technology, sent a message to the district office, and personally called the guardian back to ensure that everything was set.

The new practices developed through the collaboration are viewed as part of the process of serving more families.

Field Trips. A final logistical challenge we successfully navigated was the coordination of field trips. Although the logistics of managing the field trips created extra work and a need to problem solve, the BGC found motivation and purpose through experiencing the students' joy on the excursions and the parents' appreciation for the opportunity. Both the district ELOP team and the BGC recognized the significance of these excursions to the program.

The memorandum of understanding (MOU) between the Simi Valley Unified School District and the BGC delineated the roles and responsibilities of each party concerning the implementation of field trips. This comprehensive document, written in partnership with the school district and the BGC, explicitly defined both programmatic and logistical ELOP criteria, clearly assigning responsibilities for meeting these criteria to each party involved. While the dyads efficiently addressed the programmatic aspects of the field trips and formalized them in the MOU, the BGC encountered a hurdle in managing the logistics of transporting a large number of students to the designated locations.

Although the BGC owned several vans, their capacity fell short of accommodating the sizable student population. Tania, the education director, initially expressed concerns about effectively moving all the students. However, a supervisor's suggestion to explore contracting with a bus company provided a viable solution. Once leadership made this decision, the transportation challenge ceased to be a concern,

notwithstanding the additional work involved in scheduling and negotiating days and times.

Tania, reflecting on the experience, described the field trips as a source of personal pride. She shared anecdotes about the friendships forged and conversations held with children and parents during these outings. Recounting the joy and excitement of the children, she emphasized, “It’s wonderful, the whole purpose, the whole purpose.” The extra effort and challenges inherent in planning a new program and developing novel practices were offset by a sense of pride in becoming an integral part of the program.

Theme 3: Alignment of Implementation With ELOP Criteria

Based on data from onsite observation and data collected through documents, the BGC ELOP summer services aligned with all aspects of the ELOP vision and compliance criteria. Although the planning occurred in collaboration with the school district, the program implementation was the responsibility of the BGC. I maintained a continued collaborative relationship throughout the summer sessions, but the onsite, daily operations were the organization’s responsibility. Despite the independence of the organization in implementation, all criteria were aligned.

As mentioned in the previous theme, the MOU between the Simi Valley Unified School District and the BGC delineated the roles and responsibilities of each party concerning the implementation of state compliance. For example, on the logistical side, the child–adult ratio and the hours of operation are clarified. On the programmatic side, the intention of the legislation, as previously mentioned, is specified.

Despite the challenges of developing new practices, as delineated in the previous theme, the organization met all logistical challenges and criteria. The documentation

provided by the BGC regarding state compliance, including daily schedules, hours of operation, staffing, and menus, indicated that the organization met the program requirements of daily operating hours, student–adult ratios, and nutrition. As a licensed childcare provider and an ASES provider, these parameters were well within the BGC’s previous competency and were a clear negotiation between the district and the organization. Even with the program’s expansion through partnership with ELOP, the club was able to increase capacity in each of the previously mentioned indicators without compromising compliance.

An onsite observation occurred in the afternoon of the final week of the second session to review program implementation, which confirmed logistical compliance and also confirmed programmatic or vision compliance. The size and capacity of the Clubhouse allowed students to be in small groups, which rotated through activities. Although the observation only lasted 45 minutes, I was able to observe the implementation of six separate activities on this one visit. Table 6 summarizes the activities observed and the alignment with ELOP criteria.

Table 6

Alignment of Observation Activities and ELOP Criteria

Observed Activity	ELOP Criteria
Recreation Room: Billiards, Dance, Foosball	Physical needs and interests
Academics: Science Experiment	Academics
Snack and Free Time	Nutrition
Art: Unicorn Slime	Enrichment and academics
Gym: Flag Football	Physical needs and interests
Kindergarten Room: Unicorn Slime	Enrichment and academics

The diverse activities each met a programmatic aspect of the ELOP purpose as outlined in the law. The only ELOP criteria not directly observed were social and emotional learning. This topic is covered intentionally in the morning according to posted schedules. It could be indirectly observed through the structure of games and group activities in the observation. For example, notes within the observation in one rotation described the interaction between students and adults with a focus on SEL, “Adults focused on helping with SEL by guiding sharing, turn-taking, and cooperation.” Although a planned lesson was not observed, the result of those lessons was observed.

The observation notes also addressed visible logistical compliance indicators, including staff ratios, nutrition, and operating hours. For example, in each activity area, notes concerning the number of students and adults were reported and fit within the compliance guidelines. The operating hours were posted and photographed in various areas of the Clubhouse. In addition, the cafeteria was operating at the time of the observation and procedures for nutrition were clear.

The BGC staff felt that the implementation met the criteria for ELOP, and in interviews with both Edgar and Tania, they each expressed excitement and pride regarding the implementation of the summer ELOP program. Tania enthusiastically remarked that, in her opinion, the implementation was “scale up to 10, I think 10.” Throughout the interviews, they both told specific stories of the ELOP program activities and their impact on students, including stories of field trips and special activities and comments of joy and appreciation from parents and students. The collection of narratives demonstrated active participation and engagement in the joint enterprise. Tania later commented about the implementation and said, “We tapped all our bullet points ... I think it had a huge impact on both kids and families as well as on our staff.” She later continued, “How many thank yous I got at pickup. ... Not just me but also hearing it to the staff also.” The entire staff felt the impact of the ELOP program on their identity through participation in the program.

Case 2: Rancho Simi Parks and Recreation District

Organization Background

Since its establishment as a Special District in 1960, the RSRPD has been dedicated to enriching the lives of the local community through public outdoor space and recreational activities. Over the years, RSRPD’s commitment to the well-being of the community has led to the development and maintenance of over 50 parks and various recreation centers in Simi Valley (Rancho Simi Recreation and Park District, n.d.). These facilities serve the entire community through a wide array of events and activities for residents of all ages and abilities. RSRPD’s growth and continuous efforts reflect its mission: Rancho Simi Recreation and Park District is committed to providing safe parks,

promoting a healthy lifestyle through recreational activities and amenities, and preserving open space, trails, and community history.

Previous to the establishment of the ELOP funding, RSRPD loosely partnered with the school district through childcare services provided on 11 district school campuses. As part of its recreation department, RSRPD provided before and after-school programs on eight elementary school campuses and three teen clubs on the middle school campuses, making it the largest provider of on-campus childcare in the district. Although RSRPD alternately leases or owns space on the campuses to house their programs, the programs operate independently from the school district. These programs provide a safe and productive environment for young students before and after school. Activities include enrichment, socialization, physical activity, and homework help.

The planning team for RSRPD was primarily composed of the recreation supervisor, the recreation coordinator, and the summer directors. Assistant directors at each site were brought onto the team to implement the program. Historically, RSRPD provided summer recreational activities and a full-day summer camp at three locations, offering a recreational environment and diverse activities. With the introduction of ELOP, there was a significant increase in participant numbers, and a new location with a half-day program was added exclusively for ELOP students, complementing the existing morning summer school activities.

The RSRPD delivered ELOP services at a total of four locations during the summer programming through a 4-week session aligned with the summer school schedule. Three full-day camp locations provided a classic summer camp experience featuring field trips, art, games, enrichment activities, and swimming. These full-day

camps served both ELOP and non-ELOP students. Simultaneously, a half-day camp was situated on the same campus as the summer school, offering an afternoon camp option for students attending summer school in the morning. The half-day camp exclusively catered to students qualifying for ELOP services. In total, RSRPD served 143 students across all four locations. Table 7 describes the major findings for RSRPD.

Table 7

Major Findings: RSRPD

Themes	Subthemes	Assertions
Theme 1: Development of a Common Vision	<ol style="list-style-type: none"> 1. Identity of the organization in the community 2. Purpose of the organization 3. Populations served by the organization 4. Previous experience with direct services 	The misalignment of the RSRPD mission and ELOP and inexperience in direct services created tension for RSRPD that required trust building and additional negotiation to arrive at a common vision.
Theme 2: Development of New Practices	<ol style="list-style-type: none"> 1. Problem-solving 2. Increased workload 3. Time pressure 4. Meaning-making 	The new practices in both programming and logistics necessitated an extra workload in a short time period and negotiated programmatic changes to build trust.
Theme 3: Alignment of Implementation With ELOP Criteria	<ol style="list-style-type: none"> 1. Managing the challenges 2. Creating a new identity as an ELOP provider 	RSRPD managed the changes through meaning-making and collaborative problem-solving.

Theme 1: Development of a Common Vision

Establishing a common vision for ELOP with RSRPD required extensive negotiation due to a lack of alignment between the organization’s and ELOP’s purpose.

When comparing the mission statement of RSRPD and the specific objectives outlined in

Assembly Bill 130 for ELOP, it is clear that there is very little natural alignment. Table 8 outlines the key concepts embedded in both the RSRPD mission statement and the defined parameters of ELOP. In this partnership, both organizations had to build trust and find compromise. The collaboration involved navigating and negotiating a common understanding of ELOP objectives while also ensuring that the goals and interests of both entities could coexist in one program.

Table 8

RSRPD Mission and ELOP Parameters

Rancho Simi Parks and Recreation Department	Expanded Learning Opportunities Program
Provide Safe Parks	No alignment
Promote a Healthy Lifestyle	Physical needs and interests
Provide Amenities	No alignment
Provide Recreational Activities	Physical needs and interests, enrichment
Preserve Open Space	No alignment
Preserve Trails	No alignment
Preserve Community History	No alignment

Throughout the program’s planning phase, I held biweekly in-person meetings with the RSRPD planning leadership, the recreation supervisor, and the recreation coordinator. The choice to meet in person was a conscious choice to facilitate better communication. In the researcher’s journal, I wrote:

Earlier in the semester, we had a tough start with some staffing issues at RSRPD. I want to change that dynamic. M was out on leave, and H had no idea what ELOP was ... The in-person meeting will make it easier for me to feel the room and adjust my plan if there is tension.

Concern and worry did come up almost immediately from the RSRPD team. From the first official summer planning session, it became apparent that RSRPD felt concerns about integrating ELOP services into their organization for summer programming. These concerns were captured from that initial planning session, as highlighted in the following excerpt from the researcher's journal:

Mae mentioned more than once this idea of the "integrity of the program." As an organization, they are worried that ELOP will be too much change. I need to keep that in mind as we move forward. It does me no good if I try to make too much change and damage the relationship ... In all things, they want to be true to their organization's vision. How can I blend our visions for ELOP without damaging the collaboration?

This concept of the "integrity of the program" reflected the vast differences between the ELOP criteria and the identity of RSRPD. The organization sought assurance that implementing ELOP would not alter or compromise its established identity in the community. As the broker, I needed to build trust and ensure the organization was comfortable with the changes.

Harmony, the recreation coordinator, echoed a similar sentiment during the interview when discussing the initial collaboration with ELOP. Her statement clearly conveyed RSRPD's stance on maintaining the status quo in their programming without wanting to undergo significant changes. She said:

We run a parks and rec program. And one, our priorities are to provide recreational activities and not necessarily like super educational activities, although some of them are educational. But we want it to be fun. We don't necessarily want, like a lot of structure to our activities. And I think we're kind of scared that the school district is going to come in and say, okay, like three times a week, you have to do a STEM activity when we want to do a sport or something, you know. And then that's that's what we're worried about. That our creative control is gonna be taken away.

The comment spoke to the organization's identity as a promoter of recreation and to the self-determination of programming. There was a clear desire to maintain the identity of a recreational entity throughout the planning stages of the collaboration. As the broker, my work was to help bridge that gap and develop a cohesive relationship that honored both organizations' visions.

The negotiation toward a common vision demanded compromise and reframing of requirements to find common ground. By examining the existing RSRPD program and identifying areas of alignment, the team incrementally expanded planning from those points. For instance, recognizing that RSRPD already offered enrichment and field trips, some of which were academically oriented, the team negotiated ways to enhance and extend the academic component of ELOP through these existing activities. In an interview, Mae reflected on aligning the organization's previous programs with the ELOP vision through this method of common ground, stating, "It's exciting to hear that kind of word 'enrichment' used among both programs. Because we really feel strong about that, too." Harmony echoed this sentiment in her interview regarding negotiated changes through ELOP, saying, "Maybe, like, provide one or two extra enrichment activities, you know. But I think it's been easy." Her shift in attitude from a place of tension to a place of mutual understanding reflects framing the ELOP changes from the point of common interest. By concentrating on the smaller areas of overlap and gradually expanding from there, the team successfully developed a common vision for the program.

RSRPD also felt concerned about working for the first time with direct services from a state-funded program. In the interview, Mae spoke about this fear and the role of the broker in alleviating the concerns. She stated:

I would just say, like any anxiety I feel like you've really been able to work through them. And how like problem solve them, too. Right? So anything that we've talked about, where both of our agencies are just kind of a little bit concerned, or we're, you know, we're not sure what the grant is actually going to require ... Just that continued problem-solving as we went and the organization sharing documents, making sure we're all on the same page that we both have access to everything that we need really, really helped.

The broker's role in this situation was to explain clearly the roles and responsibilities concerning the ELOP funding of each agency. Those roles and responsibilities were outlined formally in the MOU but also discussed openly in meetings, as the quote indicates.

In an additional attempt to improve communication and ease any tension, I, as the broker, presented at an RSRPD board meeting when the ELOP MOU was presented for approval. The summer planning team asked me to present to quell any anxiety from the board about the partnership. The purpose of the presentation was an overview of the ELOP program and also the specifics of the relationship between RSRPD and the school district. It provided an opportunity to clarify any tensions and to reinforce areas of mutual benefit.

Deliberate and transparent communication throughout the planning and implementation of the ELOP program played a pivotal role in negotiating a common vision and understanding of the ELOP program requirements. Following an in-person team meeting, my notes in the researcher's journal underscored this aspect of the collaboration process:

Mae also thanked me various times for transparency. I hadn't considered the importance [of] the collaboration of this quality. As we move forward, I will need to make sure that I am communicating all aspects of the ELOP program so that they feel in control of the situation. As I write this, I think it is about control.

ELOP is so big with so much funding that there is fear that it could bury the organization.

The quote reveals the development of trust through consistent communication, the importance of respecting the organization's identity, and maintaining an equal partnership that values both CoPs.

Theme 2: Development of New Practices

In collaboration with RSRPD, challenges in new practice development centered on topics of organizational identity and the demands of new logistical plans. The challenge for the teams was to integrate innovative practices for ELOP within the existing framework of the RSRPD summer programming while also finding ways to expand their offerings to better meet ELOP criteria. This collaborative work required a balance between preserving the established identity of RSRPD and embracing the evolution necessary to meet the requirements of ELOP and maintain the partnership. The initiative also required additional efforts from all departments within the organization. Similar to the BGC, RSRPD took pride in delivering services to underserved students, justifying the extra work involved.

Maintaining Identity. RSRPD expressed a significant concern about the potential displacement of long-standing participants in their summer programming due to an influx of ELOP students. Recognizing the value of multiyear and multichild traditions within families, RSRPD prioritized maintaining these connections as an integral part of their identity in the community. A compromise to address this was reached about registration priorities that met both entities' needs. The teams negotiated a compromise where registration was first opened to previous participants and then a week later to ELOP. Mae referred to the success of this negotiation in the interview and said:

My biggest anxiety, I would say, is just maybe some of the placement, right? So, I don't want to displace kids who have always gone to Houghton summer camp. They look forward to going to Houghton. But now, an ELOP kid came in and took their place. I had expressed that when we first started talking enrollments that that was kind of a bigger concern of mine, but I think you were great in saying, Hey, you know what? Take your normal participants up to a certain point. We can notify families and say, Okay, if you want the spot at that particular school or location, like, lock it in, because now we're opening into floodgates, you know. So I did appreciate you, recognizing that we've got kind of long-standing participants who are used to going to certain locations year to year and almost giving them first priority. So yeah, I would say that was an anxiety. But you certainly like kind of squashed that anxiety as we went through.

Her remarks underscored the significance of a negotiated plan that served the ELOP population and respected and preserved the historical ties and identity of RSRPD within the community.

Three of the summer sites accommodated both ELOP and non-ELOP students, raising additional concerns at RSRPD about potential program discrepancies. The worry was that ELOP students might receive additional enrichment that was inaccessible to others, creating inequity among participants. Addressing this concern became a focal point for RSRPD, aiming for a unified program experience for all students. In my entry in the researcher's journal, I reflected on the compromise necessary for the collaboration's progression, noting the following:

They talked about the consistency of the program. They don't want services for ELOP students that are different from the other students. I will have to check my ideas. This means that I won't be able to offer as much as I could to the students, but it may need to happen to maintain the relationship.

Negotiations demanded a shift in the district plans to honor RSRPD's commitment to a singular, inclusive program that served the entire community.

Logistical Plans. The introduction of new practices related to logistical issues generated tension as the organizations collaborated on implementing summer

programming. Mirroring the experience at the BGC, the most significant logistical challenges arose with registration and managing the influx of new participants. In the case of RSRPD, an extra layer of complexity emerged due to the need to initiate an entirely new summer location for ELOP students. The pressure of accomplishing these tasks within a tight timeframe compounded the stress associated with developing and implementing new practices at the boundaries of two CoPs.

The registration system utilized by RSRPD proved ineffective for the summer program, as it was unable to recognize external funding sources such as ELOP. Consequently, all registrations for ELOP had to be manually processed, placing additional burdens on clerical and accounting staff. Harmony conveyed her frustration during the interview, stating, “There’s so many participants on top of my job that I have to do every day; there was just not enough time.” I also felt the tension. I wrote the following in the researcher’s journal:

I worry that the secretaries and admin staff will get tired of this extra work. I didn’t think of all the people who have to cooperate with the program to make it successful but are not part of it exactly. I tried to emphasize that it is a pilot year and it will be messy, but we can work out details and continue to improve.

Following discussions about the issue, the district–organization team collectively decided to increase the per-student price to accommodate the additional administrative workload, formalizing this adjustment in the MOU. This allowed RSRPD to hire administrative help to manage manual enrollment, taking pressure off existing staff. This transparent communication of concerns, coupled with collaborative problem-solving, facilitated the building of a sense of community between the two organizations. Mae highlighted the significance of communication and quick problem-solving in the

interview, stating, “I would say the communication between our agencies has been phenomenal. Both of us have been quick to take care of things.” This prompt attention to concerns played a crucial role in alleviating apprehensions and maintaining a positive collaborative atmosphere.

In addition to the challenges of registration, there was also the challenge of adding an additional location to RSRPD summer camps. A new location on the same campus as summer school allowed students attending summer school in the morning to attend afternoon summer camp on the same campus. This choice of location assisted working parents by providing full daycare for their families. The group consisted exclusively of ELOP students at the Sinaloa campus. In the interview, Harmony discussed the extra work of adding ELOP to the summer program and said:

We just maxed out everything. We had to hire more staff, and then we had to train them, and that’s just the staffing. Just to prepare our program content again to accommodate that many kids and to be prepared to run multiple activities with a full camp.

The expansion of services and additional participants added to the workload for the entire organization.

The expansion of programming combined with the speed at which it needed to be done meant that often staff had to manage new roles with little guidance. Madison, the site coordinator at the Sinaloa campus, found herself and her site partner operating a camp for the first time without a director above them. She commented in the interview, “We had a week to get the room done ... I don’t think we realized we wouldn’t have a director to go to above us to tell us what to do. You two are like the bosses.” As an

emergent program, ELOP summer programming required a quick implementation of new practices and new roles for staff, creating stress for the system.

Meaning-making emerged as a crucial aspect in managing the augmented workload associated with ELOP programming. An emergent program of this size required a deep collaboration, including additional time and energy for everyone involved. Harmony described the deep level of collaboration and negotiation demanded in the interview and stated:

And that's something that I guess you have to be prepared for, like, anybody that accepts this collaboration, you just have to know that it's going to be a lot of work. It's not just like an easy collab like, "Oh. Let's collab. I don't know if that makes sense, but it'll take a lot more. And you're gonna have to feel passionately about providing opportunities for everybody.

The quote demonstrates the role of meaning-making to drive the collaborative process and the extra work it engenders as a large emergent program.

Team members took pride in introducing new programs and catering to demographics that might otherwise be unable to afford summer camp without ELOP funding. In her interview, Mae expressed her enthusiasm for ELOP funding, stating, "I was excited to hear that ELOP was really about kind of trying to provide equal opportunity and programming for kids who maybe would never be in an enrichment program." Harmony echoed a similar sentiment during her interview, emphasizing the significance of their work by saying, "What we do is so important because we're literally creating childhoods." She further shared her personal experience of not attending summer camp as a child due to financial constraints, emphasizing her belief that every student should have the chance, considering it a "key staple to your childhood." As an organization, RSRPD is committed to community service, and expanding its programs to

include more participants, especially those facing barriers, helped alleviate the strain caused by the increased workload and programming adjustments.

As quoted from the researcher’s journal, I continually emphasized to the team, “It is a pilot year, and it will be messy, but we can work out details and continue to improve.” Framing the workload as a part of the process of implementing an emergent program helped the team to view the extra time and energy spent as necessary and also temporary. Mae echoed that same idea when she said, “It’s a learning curve. Patience is my big word. It definitely did affect other departments ... lessons learned.” The perspective of learning together combined with a valued purpose brought the team together.

Theme 3: Alignment of Implementation With ELOP Criteria

Despite facing challenges in the planning phase of the collaboration, RSRPD successfully fulfilled the majority of logistical criteria and met all programming criteria during the camp session. An on-site observation and document review provided data indicating that RSRPD summer services largely adhered to the ELOP compliance criteria, as outlined in Table 9. The only area with partial alignment was nutrition, attributed to logistical planning difficulties, which are elaborated upon in the following section.

Table 9

ELOP Compliance Criteria Alignment

ELOP Compliance Criteria	Alignment
Nutrition	Partially met
Operating Hours	Met

Student–Adult Ratios	Met
Operating Days	Met

ELOP mandated that students receive nutrition as part of the program, encompassing lunch and a snack for a full-day program. The half-day program, in partnership with the summer school, successfully met this nutritional requirement. The entire campsite qualified for the National School Lunch Program (NSLP) based on the percentage of students eligible for free and reduced lunch. This qualification process was simple since the majority of the group fell under ELOP and, thus, qualified for NSLP.

However, the other three sites served a mix of ELOP and non-ELOP students, making eligibility for NSLP impossible. While ELOP provided dedicated funding for lunches, the logistical challenges of coordinating the implementation of this requirement within the mixed group proved insurmountable for the team. Consequently, the MOU stipulated nutritional obligations only for the half-day camp, explicitly stating, “SVUSD will provide lunch and a snack at the Sinaloa location.” The other locations only received a snack.

The challenges in managing nutrition for mixed groups are highlighted in the researcher’s journal, which noted the difficulty of aligning the program with ELOP guidelines for sites with a combination of ELOP and non-ELOP students. A passage from the journal captures the difficulty of this negotiation process and states:

I met with RSRPD this afternoon. We will do three sites plus Sinaloa. The Sinaloa site will be easy to manage because they are all ELOP. I can provide food to them, for example, but the other sites will have a combination of ELOP and non-ELOP students. I still am trying to figure out how to align the program to the ELOP guidelines when it is a mixed group ... I feel that if I push for more change that aligns better [with] ELOP, I will destroy trust. This first year has to be a building year when we are learning to work together.

Both teams were willing to find a solution, but the short timeframe of a new program made it impossible for the first-year implementation.

On the programmatic side, RSRPD met all ELOP criteria according to data from both the observation and documents. During the observation, the researcher observed a 45-minute time period in the afternoon on one site. Table 10 describes the alignment between the observed activities and ELOP criteria.

Table 10

Alignment of Observation Activities and ELOP Criteria

Observed Activity	ELOP Criteria
Game Played With a Ball	Physical needs and interest
Craft	Enrichment

In addition, the displayed schedule on the board outlined the week’s field trip, weekly theme, and team-building activities. These supplementary activities aligned with the ELOP criteria for academic and social–emotional learning. The observed activities, both directly and indirectly, serve as tangible evidence of fulfilling the ELOP programmatic criteria. A comprehensive document review, including schedules and activities, further corroborated this programmatic alignment.

While the collaboration between the school district and RSRPD demanded more intensive negotiation, the outcome was an implementation that nearly met all ELOP requirements, evoking pride and satisfaction from the organization’s leadership. Mae conveyed her contentment with the program in the interview, stating:

Through ELOP, we were able to offer those at our camps, and that was really appreciated because [for] some of those extra enrichments, we have to kind of

balance our budget a little bit. So sometimes we can provide them one week, but we can't provide them the next. So, I think that the partnership really gave us a chance to have the offsite field trips, the onsite programming, and the special guest, which is really important to us.

The program's implementation met the criteria when measured by the data.

Establishing this partnership necessitated the building of trust and mutual respect for the identity and community role of RSRPD within the context of a unified and comprehensive program.

Case 3: YMCA

Organization Background

The YMCA originated in London with a mission to support young men in need; shortly thereafter, the organization expanded its programs to reach the United States and has since grown into the nation's leading nonprofit organization. The YMCA's mission has evolved to encompass all individuals, irrespective of age, gender, or background, while still focusing on its core purpose of strengthening the community by enabling individuals to achieve their fullest potential and lead healthy, productive lives (YMCA, n.d.). Local clubs define their own services and activities to meet community needs, but the mission of the local organization, Southeast Ventura County YMCA, continues to echo the organization's mission from over 170 years ago. The mission of the local club associated with this study closely aligns with the national organization's central mission of impacting communities. The mission reads, "The Southeast Ventura County YMCA builds relationships, impacts lives, and strengthens community through healthy living, youth development, and social responsibility" (YMCA, n.d., para. 2). As an extension of

the mission, the local YMCA measures its direct impact on the community through its signature projects, one of which is Find My Genius (FMG).

The original FMG program, facilitated by the local YMCA, closely resembled similar youth initiatives established by the YMCA throughout the nation. The leadership of the Southeast Ventura County YMCA successfully designed and executed their own youth summer program in the summer of 2019, copying other YMCA initiatives, initially on a small scale with one site in a single school district. Originally, the camp relied on private funding. However, the introduction of ELOP transformed the scale of the FMG initiative, and by the summer of 2023, the time period of this study, the FMG operated various sites in four local school districts.

The primary objective of FMG is to address the achievement gap by offering a 5-week summer camp tailored to the needs of underserved students. In the MOU between the YMCA and the Simi Valley Unified School District for the summer ELOP program, the YMCA included additional purpose statements clarifying a submission of the organization and the intent of FMG. It stated:

WHEREAS the Association has one of its missions to transform the academic achievements, self-confidence, and life trajectories of children living in under-resourced, urban communities;

WHEREAS the Find My Genius Program is designed to build academic skills in reading and in math and to encourage positive youth behavior and improve self-image. (YMCA, n.d., paras. 3–4)

The program partners the YMCA with BellXcell, a youth curriculum provider, to incorporate a focus on academics into the summer program. FMG integrates morning academics with afternoon enrichment activities, also incorporating a weekly field trip and two afternoons dedicated to swimming lessons for all participating students. A

certificated teacher provides morning classroom instruction in math and English Language Arts. Each room also has a teacher’s assistant, creating a very small teacher-to-student ratio. Afternoon time includes enrichment and field trips implemented by camp counselors. Breakfast and lunch are provided for all students during a comprehensive 9-hour day.

In the summer of 2022, the school district and the YMCA first collaborated to introduce an FMG pilot program at one single site, catering to 60 students. During this initial implementation, the program exclusively served students from one specific school site. However, in the summer of 2023, the focus of this research, the FMG program expanded to two sites, each providing services to 100 ELOP-eligible students from across the entire district for a total of 200 student participants. Table 11 describes the major findings of the YMCA Find My Genius program.

Table 11

Major Findings: YMCA Find My Genius

Themes	Subthemes	Assertions
Theme 1: Development of a Common Vision	<ol style="list-style-type: none"> 1. Purpose of the organization 2. Focus on community impact 3. Target population of FMG 4. Previous experience with FMG 	The alignment of FMG’s mission with ELOP facilitated the development of a common vision, although the FMG program was fully developed before the collaboration.
Theme 2: Development of New Practices	<ol style="list-style-type: none"> 1. Time-pressure 2. Problem-solving 3. Structure of the program 4. Meaning-making 	The use of district facilities and resources demanded intense collaboration with various district departments.

Theme 3: Alignment of Implementation With ELOP Criteria	<ol style="list-style-type: none"> 1. Managing the challenges 2. Building of trust 3. Building of community 	Through engagement in a shared project, the teams developed trust and built community.
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Theme 1: Development of a Common Vision

Establishing a common vision for ELOP services was straightforward because the FMG program aligned well with the ELOP purpose and definition, incorporating all the necessary ELOP programmatic activities into the design of the YMCA’s program. Table 12 provides a detailed overview of the legal alignment between the FMG mission statement and the ELOP description. Additionally, this alignment in purpose statements combined with the planned programmatic activities of FMG completed the ELOP program criteria as described in its definition in AB 130.

Table 12

FMG and YMCA Mission and ELOP Parameters

Find My Genius	Expanded Learning Opportunities Program
Transform Academic Achievement	Academics
Transform Self-Confidence	Social–Emotional Learning
Transform Life Trajectories	No Direct Alignment
Under-Resourced, Urban Populations	Underserved Populations
Improve Academics	Academics

The FMG program’s framework incorporated enrichment through field trips and afternoon activities. Additionally, a daily social–emotional curriculum was integrated into the classroom, aligning directly with the ELOP initiative requirements. From its inception, the FMG program was closely aligned with the ELOP definition. The YMCA

developed the original FMG plan to address the achievement gap using similar strategies of out-of-school academics and enrichment, addressing the same student challenges emphasized by the ELOP initiative.

The FMG summer model was developed by the YMCA prior to the passage of ELOP funding. The program was offered to the Simi Valley Unified School District as a fully developed program based on the mission above. The language for the mission and program framework is codified in the MOU between the school district and the organization. This MOU was written by the YMCA and is consistent across all school districts where the local YMCA implements FMG. The program is offered as a completely developed program, negating the need to negotiate specific programmatic elements.

At the beginning of the collaboration, I felt concern over the lack of programmatic negotiation with the YMCA. They were set on their vision for FMG across all districts where it was to be implemented. Changes in programming were not part of the negotiated collaboration with the school district. This caused some concern. I expressed in the researcher's journal the following:

The FMG program aligns well [with] the ELOP vision. As long as that is true, I don't need to participate in the details of programming. My role with FMG will be as a broker of logistics, pricing, and other details outside of programming. It is different than I had anticipated, but again, as long as their vision aligns with ELOP, I need to let go.

The passage demonstrates the tension created by the firm position of the YMCA in maintaining their program and my choice as the broker not to strain that relationship as long as the program aligned to the ELOP funding.

The YMCA felt pride and confidence in the FMG program they had developed and felt that it served the same purpose as ELOP to mitigate the achievement gap. Alison, the program director for the YMCA, felt that the purposes of FMG and ELOP paralleled each other directly. She stated, “They are getting this high-quality education during the summer months. And it’s at no cost to them is, I think, the greatest tie between the goals and mission of the of Find My Genius and the ELOP program.” Her comment linked the overall mission and purpose of both programs. ELOP and FMG were designed to support underserved youth to improve school success through opportunities outside of the regular school day. Jennifer, a site coach, echoed that sentiment in her interview when asked if the mission of the program aligned with ELOP and commented:

Yes, I think so. It kept the kids in a good social, emotional state. It kept the kids academically moving forward. It allowed for families to have an avenue of providing a safe space for their kids to go to. So I do think that overall it met the goals.

The interview statements from FMG program staff indicated that the employees felt an alignment between ELOP and FMG’s overall purpose and vision. Despite limited negotiation, the program aligned with ELOP parameters.

Theme 2: Development of New Practices

Within the collaboration between the school district and the YMCA, challenges in developing new practices centered primarily on the logistics of implementing two large programs on district school sites. The coordination of resources, space, and transportation posed obstacles to implementation that required constant communication and negotiation between the organizations and within the school district’s many departments.

Additionally, the collaborative partnership faced the challenge of expanding student

participation from previous years, multiplying logistical needs. Finally, collaborative processes of a new program caused tension due to a desire to maintain the program's integrity as designed by the YMCA. Addressing and problem-solving all the challenges became the focus of the planning cycle.

Expansion. The FMG program through the YMCA expanded services in Simi Valley from 60 students in the summer of 2022 to 200 across two sites in 2023. In addition, the local YMCA involved in the study expanded its services from 380 total FMG participants across three districts in 2022 to 560 in four school districts within their boundaries in 2023. The rapid expansion required a reorganization of responsibilities as well as hiring new staff. All the changes caused knowledge gaps and a need to develop a series of new practices and new protocols.

The absence of documented practices presented an additional workload for the FMG staff. Alison highlighted in her interview that despite conducting a "little pilot the previous year for four weeks," it was insufficient to establish concrete processes. She further noted that the absence of defined practices and protocols resulted in confusion regarding "who's in charge of what." This growth and change demanded an increased workload for Alison, who stated, "I've been working 16-hour days." Jennifer, a site coach, echoed this sentiment, stating, "I think procedures and protocols would help. Having more clarity from the FMG side." The swift expansion of programming, coupled with the incorporation of new staff for an emerging program, contributed to growing pains as standard practices were continually evolving.

Logistical Needs. The FMG program was executed at two district school sites, accommodating 100 students at each location. It was the sole summer program fully

utilizing district facilities. FMG operated, in many respects, similar to a summer school. The program maximized the use of classrooms, playground equipment, and the cafeteria throughout a comprehensive 9-hour day for a total of 5 weeks. With credentialed teachers leading classes in the morning, it created a necessity for technology access to facilitate the program's educational components. In the afternoon, counselors leading camp activities continued to utilize the entire campus. Additionally, field trips were also accessed using district buses. The extensive use of district resources created a need to negotiate procedures and protocols with district departments.

The use of district facilities and resources in this manner necessitated the additional coordination of many district departments, including custodial, information technology (IT), transportation, and food services. My role as a broker with FMG included significant brokering within the school district to coordinate the various departments to facilitate the FMG implementation. The district departments struggled with understanding the program's needs as it did not always match the needs of our summer school. For example, IT access became an issue because the teachers hired for FMG were not district employees and only district employees could access the district's internet. My frustration with district departments was clear in the researcher's journal, which stated:

I am not feeling that there is a willingness to make changes to accommodate ELOP, and these obstacles are from our own organization. That was a surprise for me. Sometimes, other departments within the district are harder to work with than the outside organizations. We are stuck within our own habits even when the new innovation is coming from us.

As the broker, I needed to interface with district departments despite the obstacles and problem-solve better ways to communicate and accomplish what I needed for the program. In a later entry, I added:

I feel like IT has been overly complicated throughout the whole program. I think that they are not processing how this program is different from summer school and even that this program exists with needs for tech. We keep getting caught up in miscommunication. So, reflecting, there are two causes. First, is that it is hard to communicate with IT; they are swamped and tend not to respond or to respond in a word or two. That leaves a big opening for confusion, as was the case with the access. The other problem is that they have a hard time with how this program is different from any other program we've worked with. It's not summer school, but they need access. There are teachers, but they're not our teachers.

Together, the quotes speak to the barriers to innovation even within an organization. The various departments within the district did not understand the ELOP program and, therefore, did not understand the changes that needed to happen to accommodate a partnership with an outside organization working to implement a district initiative during the summer. The structures did not match their previous experience with summer programming, causing confusion.

As I worked with other departments within the district of the FMG program, I was also very careful to keep everyone engaged in the project. Although many departments do not deal directly with student education, their participation is necessary for the functioning of educational programs, and if they become disengaged, it can make a project very difficult. The problems with custodial staff were an example of my concern about continued participation in the initiative. Although I had met various times with the custodial department, there was still miscommunication about the staffing needs, as seen in the researcher's journal, "It's just weird that I have funding for custodial work, but

changing the way things are generally done comes with so much protest. The custodial hours could undermine a program that serves our neediest community.”

I worried that too many complaints to district leadership would impact the project’s success. I needed the active participation of all district staff involved, even partially in the program.

In order to maintain a collaborative relationship with the YMCA, I handled most of the negotiations with the district departments on my own. I provided the YMCA with an overview of the problem but did not demonstrate my concern. For example, complications with the NSLP application caused me concern, but as the broker, I wanted to attempt to find a solution or workaround before I explained it all to the YMCA. An entry in the researcher’s journal expressed this strategy, stating:

During the meeting with FMG today, I kept it to a minimum, but I am very worried. I didn’t want them to worry when they can’t control any piece of the solution process. I will meet with district people this week to hopefully work through it. If we can’t get the national lunch, what will we do?

Alison reflected that problem-solving and interfacing with various district departments were among the most important roles of the broker. It simplified the partnership by identifying one person to interact with the larger district. She said:

You are on the front lines. You are the one doing all of that for communication coordination within your own district. So I felt like I didn’t ever have to, like, really be overwhelmed or concerned with it. If there was an issue, you know, I could go to you with it if you found an issue, you would bring it to me, and I just felt like that true partnership is really what helped everything feel manageable and like we could do it.

The use of district resources and facilities added complexity to the planning and implementation of the FMG program. These unique needs shifted the broker’s role to

include intensive negotiation within the district's departments and between the two organizations.

Program Collaboration. As stated earlier, the YMCA entered the collaboration with a fully formed program that they had designed with the support and guidance of the national YMCA. The summer of 2023, the time period of this study, represented the sixth year of implementation of an FMG program by the local YMCA. The organization identified with its program and did not see any need to make programmatic changes during the initial planning phase. As the broker, I felt conflicted about the lack of collaboration between the two organizations, but I also realized that the FMG program aligned well with ELOP requirements, so I did not push any changes. At a meeting at the beginning of the planning stage, I suggested an addition to their program around social-emotional learning, which the YMCA did not accept. The researcher's journal describes my reflection on the meeting collaboration, stating:

The conversations were easy around logistics and paperwork. The harder conversations, from my perspective, were around programming. I don't think they are open to any kind of changes to their FMG plan. I am outside the role of instructional practices. They don't want my ideas around best practices. I am struggling a little with that. The FMG group has total control of the instructional program.

Entering the collaboration, I assumed that as a district representative, I would have input on the implementation of the programming. After this meeting, I felt that I needed to allow the YMCA to run its program as long as it aligned with ELOP.

Over the course of the summer, the relationship between the organizations developed, creating trust and confidence. At the final debrief of the summer, the change in the collaborative relationship was evident. The meeting centered on both

organizational and programmatic improvements for the following year. The entry in the researcher’s journal reflects the change in the interorganizational collaboration from the beginning of the summer, stating:

I felt that my opinion on both organization and programming was really valued. We had a very productive conversation. It was a change from the beginning of the partnership, where I felt that my role was only logistics. I attribute it to trust and the formation of a true partnership. I felt very empowered to be a true part of their CoP on the summer planning and implementation.

The reflection underscores the evolving partnership between organizations throughout the development of an emergent program. Through engagement in shared experiences and success, a sense of community developed.

Theme 3: Alignment of Implementation With ELOP Criteria

Based on a formal site observation and supporting documents, the FMG program met all ELOP criteria in terms of programming and compliance. A 45-minute observation at one site occurred during the implementation of the summer program. During the observation, the researcher visited all the classrooms and the main office. The visit occurred in the morning during math time. Table 13 summarizes the activities observed and their alignment with ELOP criteria. Notes on additional observed evidence are then described.

Table 13

Alignment of Observation Activities and ELOP Criteria

Observed Activity	ELOP Criteria
Classroom 1: Hands-on math games with manipulatives.	Academics
Classroom 2: Digital math assessment to determine growth.	Academics

Classroom 3: Math word problems in small groups.	Academics
Classroom 4: Engineering Project Office: Weekly schedule of enrichment, physical activity, field trips, and weekly menu.	Academics Enrichment, nutrition, social–emotional learning, physical needs and interests

The timing of the observation revealed the adherence to a strict academic schedule and rigorous academic activities during the morning. All classrooms were engaged in academics. Ratios of adults to children exceeded the benchmarks established by ELOP, creating an environment with significant support for students. On the walls, the researcher observed evidence of the social–emotional curriculum and the core value of the week. In the office area, a weekly schedule for both academic mornings and enrichment afternoons was observed. The enrichment included a daily scheduled time for meditation, STEAM, art, and team building. Field trip schedules were observed on another whiteboard. Weekly menus and daily schedules were also observed indirectly, demonstrating compliance with the ELOP program and compliance criteria.

An additional document review indicated that all criteria were met daily. This documentation provided by the YMCA included student–adult ratios, daily hours, nutrition, physical needs and interests, and enrichment. The documentation demonstrated a comprehensive academic-based camp experience.

The staff also felt that the program benefited student participants. Jennifer reported, “Students were coming with smiles.” She also described specific academic gains by a recent immigrant who made great progress in language skills during the camp. Narratives of positive experiences with students support identification with the program.

She continued by noting the advantages that participants received by attending the camp and said:

It kept the kids in a good social-emotional state. It kept the kids academically moving forward. It allowed families to have an avenue of providing a safe space for their kids to go to. So I do think that overall it met the goals.

The staff felt that the implementation served the purpose of the grant to provide high-quality out-of-school opportunities for underserved students.

Cross-Case Findings

This section of the results aims to extend the analysis by comparing individual cases to gain insights into how interorganizational collaboration develops through the planning and implementation of an emergent program. The cross-case analysis is organized around the three central themes analyzed in the previous sections. The comparison of these themes across cases focuses on points of tension and resonance. This analysis endeavors to define the combination of factors that contribute to the expression of the themes and to answer the research questions.

Development of a Common Vision

The development of a common vision for the summer programming was an essential component of the collaboration. This clear understanding of the program elements was fundamental in designing and framing successful ELOP programming. Within the theoretical framework of CoP, this shared vision served to define the domain and shared purpose of the teams, uniting them toward a collective objective.

During the negotiation process to establish a shared vision for the program, various points of tension and resonance emerged. Recognizing the significant role of a unified vision, it became imperative to address and resolve these tensions. This was

crucial for fostering a sustainable collaborative relationship, essential for the success of future ELOP projects. The broker's role within this theme was to relieve tension and move the teams toward a common understanding of the ELOP funding, laying the foundation for community development and aligned practices. Table 14 summarizes the cross-case findings for the theme of developing a common vision.

Table 14*Development of a Common Vision: Tensions and Resonance*

Organization	Tensions	Resonance
Boys and Girls Club		<ol style="list-style-type: none"> 1. Alignment of the organization’s mission with ELOP’s purpose. 2. Previous experience with direct services. 3. Previous experience with the target population.
Rancho Simi Recreation and Parks District	<ol style="list-style-type: none"> 1. Misalignment of organization mission and ELOP. 2. Inexperience with direct services. 3. Identity in the community. 	<ol style="list-style-type: none"> 1. Organizational focus on enrichment for youth development. 2. Focus on access.
YMCA: Find My Genius	<ol style="list-style-type: none"> 1. Identity with previous program. 	<ol style="list-style-type: none"> 1. Alignment of program mission with ELOP purpose. 2. Previous experience with the program. 3. Organizational focus on impact.

Each of the organizations in this study has an origin based on a community or societal need. Their missions directly mirror and address that community need. As such, the defined purpose of the organization is closely tied to its identity. When the ELOP criteria and purpose aligned with the organization’s previous identity, there was resonance with the ELOP vision. In this case, the organizations easily developed a common vision. In cases where the collaborative effort with ELOP challenged the organization’s identity, tensions arose.

No tension existed within the collaboration between the BGC and the school district concerning formulating a shared vision. The congruence between the ELOP definition in law and the BGC's overarching mission allowed for a simple negotiation of a common vision. Moreover, the prescribed activities outlined in the ELOP law echoed the core activities of the local BGC. As an entity designed to serve the needs of youth, particularly in disadvantaged communities, the BGC found the transition to ELOP programming to be a natural fit.

Furthermore, their prior partnership in delivering direct services in collaboration with the school district played a significant role in facilitating the development of a common understanding of ELOP services. This collaborative history not only simplified establishing a relationship for the direct services for ELOP but also laid a solid foundation of preexisting collaboration, trust, and effective communication.

Quotes from the interview with BGC staff reflect the straightforward incorporation of ELOP into their existing identity. Edgar stated that ELOP "helped us evolve," and it "expanded what we were doing," reflecting the natural alignment of the visions. He also described "years of experience" working with direct services and underserved communities, creating a "template" for ELOP services. Therefore, ELOP was viewed as an extension of their established mission, providing more program funding and significantly more participants.

In contrast, various areas of tension needed to be negotiated in the partnership with RSRPD. The organization identified closely with its mission to provide recreational opportunities to the community based on enjoyment and socialization. The academic emphasis in ELOP posed a threat to what Mae referred to as "the integrity of the

program.” The RSRPD CoP felt strongly that their previous programming reflected their mission as a recreational entity, and RSRPD leadership did not want participation in ELOP to fundamentally challenge who they are as an organization nor challenge their identity in the community. Harmony echoed the sentiment when she discussed the concern that ELOP would reduce the organization’s “creative control” to run its traditional programs. Compounding the anxiety around participation in ELOP services was the weight of providing direct services to students through a state-funded program.

The broker’s role was fundamental in alleviating tensions around forming a common vision for a government program. By first focusing on places of resonance, such as interest in providing enrichment to all students and building programmatic elements from that common element, the team was able to innovate programming while still respecting the identity of RSRPD. The presentation at the RSRPD board meeting also allowed for open discussion about the program, reducing tension.

Transparent communication regarding areas of tension and a collective commitment to addressing all issues collaboratively further facilitated the resolution of conflicts in shaping a shared vision. Mae observed that the team adeptly navigated and resolved tension points, attributing this success to collaborative problem-solving. The consistent sharing of documents also played a crucial role in ensuring alignment, with Mae expressing appreciation for the broker’s role in alleviating “any anxiety” associated with introducing new programming initiatives. The broker’s role in creating community and trust was much more significant in the RSRPD district dyad than with BGC.

Like the BGC, the YMCA program mission, FMG, aligned perfectly with ELOP, easing the work of creating a common vision for the program. Furthermore, the

organization's dedication to community impact served as an additional catalyst for alignment. The YMCA entered the collaboration process with an established program aimed at addressing the identical concern as ELOP—the achievement gap. ELOP allowed the YMCA to fund a program they were already committed to. The specific purpose of both ELOP and FMG was a point of resonance between the school district and the YMCA.

The area of tension within the creation of a common vision related to the issue of entering the collaboration with a fully formed program. Like RSRPD, the YMCA strongly identified with its own previously created program structures. Tension arose with identity when there was a perception that the district wanted too much change. Due to the natural alignment between their program and ELOP, I allowed them to move forward with little interference. As trust developed over the course of implementation, our collaboration deepened until I was fully part of their CoP. At that point, I was consulted about specific programming and the overall structure of the summer camp.

Developing a common vision sets the foundation for the work of implementing an emergent program. Through the lens of CoP, a common vision clarifies the domain of the team and determines the purpose of the team. It provides the framework that becomes the foundation of the CoP and sets the stage for the team to collaborate effectively.

A natural alignment of missions between organizations facilitates the formation of a common vision. When the missions do not naturally align, the broker must support the teams in negotiating through those tensions to integrate new ideas while also honoring the previous identity of the organization. Consistent, open communication and flexibility

on the part of both organizations become essential in developing the trust necessary to work through tensions.

Previous experience that complements the mission can also simplify the initial negotiations of a common vision between organizations, as was the case with the BGC. Their experience with ASES aided the collaborative process. That same previous experience can create an impediment when it impedes collaboration. This was the case with both the YMCA and RSRPD, who resisted change to their programs. All previous competencies are tied to the organization's identity and must be considered by the broker when establishing a common domain for the new CoP.

Development of New Practices

A practice within a CoP denotes an accepted and appropriate manner of doing something within the community's context (Wenger et al., 2002). These practices encompass various methods through which a CoP generates knowledge and utilizes resources. They also identify and define the CoP. Furthermore, this shared set of practices contributes to a sense of community and enhances the collective identity within the group.

This case study sought to understand the collaboration process at the boundaries of CoPs. A CoP is characterized by competence and experience. Therefore, the need to create new practices through interaction with another CoP at a boundary can generate tension. This tension is mitigated by creating new learning and practices or rejecting boundary processes (Wenger et al., 2002). The boundary work can be vulnerable if the tensions are not resolved. A summary of both the tensions and places of resonance that developed throughout the planning stage is found in Table 15.

Table 15*Development of New Practices: Tensions and Resonance*

Organization	Tensions	Resonance
Boys and Girls Club	<ol style="list-style-type: none"> 1. Increased workload 2. Increased participants 3. Time-constraints 	<ol style="list-style-type: none"> 1. Meaning-making
Rancho Simi Recreation and Parks District	<ol style="list-style-type: none"> 1. Increased workload 2. Increased participants 3. Time-constraints 4. New site 	<ol style="list-style-type: none"> 1. Meaning-making
YMCA: Find My Genius	<ol style="list-style-type: none"> 1. Use of district resources 2. Expansion of program 3. New staffing 	<ol style="list-style-type: none"> 1. Meaning-making

As an emergent program, the ELOP summer services required that the district–organization dyads collaborate continually to develop and implement new practices, often with a quick turn-around. The time constraints combined with the expansion of services created an increased workload for all teams and also for their organization as the programs planned and prepared for the first year of implementation. Various broker strategies helped to alleviate the tensions across all CoPs.

Effective communication, a commitment to continuous learning, and flexibility in agreements all played pivotal roles in addressing tensions arising from the introduction of a new program and the work of developing new practices. Transparent and consistent communication, facilitated through regular meetings, shared documents, and email exchanges, enabled the teams to swiftly and efficiently resolve problems as they emerged. While this approach did not always eliminate the issues, it fostered a sense of community by building relationships and trust among team members.

Throughout the planning process, there was an intentional focus on learning. Participants frequently acknowledged the challenges with phrases such as “it was a learning curve” and “lesson learned.” In my role as the broker, I underscored the fact that it was a pilot year—a period of rapid idea development—and assured the team that we would refine these ideas for subsequent years. The intense workload was recognized as temporary, forming an integral part of the initial year’s experience.

In response to the tension imposed by the workload of registration with RSRPD, which posed a threat to the team’s viability, I negotiated to raise the price per student for the summer program. This supplementary funding enabled RSRPD to hire office personnel specifically tasked with completing certain aspects of student registration. This strategic move effectively alleviated the tension within the organization’s team by providing additional support while also improving the sense of community.

The rapid expansion of the programs stressed all aspects of implementation, from finding space within existing programs to onboarding new staff. In particular, The YMCA and RSRPD struggled with site leadership, creating some tension as new employees ran programs for the first time without clear guidance or protocols. The BGC did not have this difficulty, in part because their program was run from a single location, their Clubhouse, allowing new employees constant access to leadership. Although it was a tension without a clear resolution during the study, both programs felt the value of expanding to an additional site and servicing more students.

The YMCA program encountered a distinctive tension for its team stemming from its extensive utilization of district resources and facilities. This structure required a shift in the broker’s role, transitioning from mediating between the district and the

organization to a concentrated effort within various school district departments to facilitate program implementation. From the broker's perspective, the task involved troubleshooting within the district while actively managing and minimizing tension within the relationship with the YMCA. This strategic approach instilled confidence within the YMCA, as evidenced by Alison's statement, "It wasn't ever anything that we felt wasn't going to be. There wouldn't be a solution at the end of the day." This strategy notably enhanced the cultivation of both trust and a sense of community.

In each of the three dyads, the teams relied on individual meaning-making processes to relieve tensions arising from the first year of implementing a new program. The formation of new practices within each CoP, combined with active participation, was essential to creating meaning (Wenger, 1998). This sense of purpose played a pivotal role in alleviating the tensions associated with developing an emergent program. Participants often discussed the significance of increased access for underserved students and the joy they witnessed during implementation. For example, Edgar explained that when confronted with the extra work and craziness of a new program, he encouraged his staff to "change the mindset to 'wow!'" The value of the program in serving students significantly contributed to the cultivation of a shared history within the team as ELOP providers, fostering a sense of community and new identity, thereby mitigating some of the tensions arising from the rapid development of the program.

Alignment of Implementation

The collaborative arrangement between Simi Valley Unified School District and the three participating organizations had a structure in which the school district and its CoP influenced and provided financial support for the diverse programs. However, the

execution of the program was delegated to each respective organization. This dynamic underscored the importance of forging a common vision and engaging in collaborative planning. Given that the organizations assumed responsibility for the implementation phase, developing a shared vision and collaborative planning became integral to the initiative’s success (see Table 16).

Table 16

Alignment of Implementation With ELOP Criteria: Tensions and Resonance

Organization	Tensions	Resonance
Boys and Girls Club		<ol style="list-style-type: none"> 1. Previous experience with childcare 2. Pride and identity
Rancho Simi Recreation and Parks District	<ol style="list-style-type: none"> 1. Compliance in a mixed group 	<ol style="list-style-type: none"> 1. Previous experience with childcare 2. Pride and identity
YMCA: Find My Genius		<ol style="list-style-type: none"> 1. Previous experience with childcare 2. Pride and identity

The majority of the effort and nearly all the tensions were concentrated in the planning phase of the collaboration. As the organizations transitioned to the implementation stage, the tensions associated with formulating a shared vision and establishing new practices were mitigated. At this juncture, all organizations had gained clarity on the strategies required to navigate the successful execution of a program that adhered to ELOP criteria.

Drawing upon their previous experience and proficiency in childcare, all three organizations easily navigated the alignment process with compliance criteria. This encompassed considerations such as student–adult ratios, daily operational hours, and

safety standards. The sole instance where compliance was not met pertained to nutrition at the three RSRPD sites that hosted a combination of ELOP and non-ELOP students. Despite concerted efforts by the teams to negotiate a viable plan for compliance in this domain, time constraints proved limiting. Consequently, as the program transitioned into the implementation phase, the CoP was cognizant that the specified criteria related to nutrition would not be met at those sites.

Based on the data collected, all ELOP programming requirements, as described in AB 130, were met by all programs at all site locations. Each organization's implementation had unique programming, but all programming met ELOP criteria. Permitting flexibility within the framework of ELOP allowed the organizations to maintain their own history and identity while also integrating innovative practices for ELOP.

The successful rollout of the programs provided a sense of pride and a shift in identity for all teams. Participating in the implementation that impacted so many students who would not otherwise have access to summer camps created a sense of pride for team members. Interviews included specific narratives of implementation that impacted staff members. There was a shift toward becoming an ELOP provider as staff participated in the implementation. As Tania stated, "It's the whole point."

Findings in Relation to the Research Question

The central research question guiding this study was the following: How do team members from different organizations negotiate the development of a viable plan for implementing a new initiative? The research question includes four subquestions that reveal different aspects of the central question. By focusing on the subquestions, a full

understanding of the central research question emerged. In the following section, the subquestions are discussed in detail.

RQ1(a): What New Practices Develop As They Work Together on a Shared Project?

A practice is the embodiment or reification of how a CoP learns and uses resources through participation (Wenger, 1998). Over time, these practices represent and define the community from which they originate, shaping identity. As an emergent program, the ELOP summer services demanded the development of many new practices in a short amount of time. The new practices involved not only ELOP programming requirements as outlined in AB 130 but also many practices related to logistics and infrastructure.

The intensity of developing and implementing new practices quickly in all aspects of the summer programming created areas of tension across all organizations. Primarily, expanding services to accommodate an influx of students initiated logistical challenges, including physical space, technology needs, and staffing. This created an additional workload for existing staff and some shifting of responsibilities for both old and new staff.

Unique areas of tension specific to individual programs included those around organizational program structure and identity. The tension experienced by the YMCA, for example, was due to their use of district resources. This structure required intensive coordination with many departments within the district and coordination between organizations. The other unique tension present in the RSRPD team resulted from the programmatic changes needed to find alignment with ELOP. These programming changes challenged the organization's identity as a recreational services provider.

Designing, learning, and implementing new practices in a short time frame was stressful. To alleviate this tension, district–organization dyads engaged in constant communication and problem-solving to address challenges and develop new practices. All participants in the study mentioned continuous communication and quick problem-solving as essential pieces of collaboration. Through the lens of COP, this intense negotiation comes from active participation, a central component in creating a CoP.

Wenger (1998) stated that participation and reification come as a pair. Together, they produce the intense negotiation that leads to experiences of meaning. It is this negotiation of new practices as a team that anchors the community and creates meaning. This creation of meaning then creates identity. In this study, teams participated actively, negotiated practices intensely, and found meaning in providing services for underserved students.

Specific meaning-making occurred around the project’s goal, which was to provide summer programming to underserved students. Team members from every organization commented on the program’s value in providing access to students whose families could not afford summer programming. As Harmony stated, “It’s not just like an easy collab like, ‘Oh. Let’s collab.’” On the contrary, a program of this size necessitates a deep level of collaboration that includes deep participation and the development of many new practices.

RQ1(b): What Competencies From Their Previous Domains Support or Obstruct New Practice Development?

Each participating organization brought to the ELOP partnership a history of successful service to the community. This history shaped their identity and, therefore,

played a pivotal role in the development of the ELOP summer initiative. In certain instances, previous competency and identity facilitated collaborative efforts, creating resonance with the ELOP program, while in others, they posed challenges.

The ELOP summer programming occurred at the boundaries of CoPs. Boundaries, as highlighted by Wenger et al. (2002), offer opportunities for significant learning and potential challenges. When CoPs converge at a boundary, participants must view their practices from a new perspective, fostering the potential for profound learning and the creation of novel knowledge. However, this encounter may also instigate tension, particularly when established identities formed through previous competencies are confronted by new practices. When the ELOP criteria or compliance resonated with an organization's prior expertise or ideology, they drew upon that experience to understand their roles and responsibilities associated with the grant. ELOP aligned with their expertise and moved the team forward. In instances when new practices differed from previous competencies, tensions of identity emerged. Negotiation of new practices resolved the tensions.

All organizations had previous experience in childcare, facilitating the understanding and implementation of many ELOP compliance indicators. For example, student–adult ratios, hours of operation, daily activity schedules, and camp operating hours were easily negotiated. Although there were slight differences in requirements from ELOP compared to their individual programs related to these indicators, the similarity was easily transferred. The only compliance indicator not met during implementation was nutrition at the RSRPD sites. The organization did not previously provide nutrition, and the teams were unable to negotiate a solution within the timeframe of the first year of

implementation. For all other compliance indicators, the organizations relied on previous experience and expertise to adapt to ELOP compliance.

The BGC had previous experience in direct services for a state-funded program, ASES, facilitating their understanding and implementation of ELOP. They had worked with underserved students and underserved families and were experienced at delivering services and providing access to this targeted population. As Edgar commented, ASES provided a “template” for ELOP that facilitated their adaptation to the new initiative. On the contrary, the inexperience of RSRPD with direct services created concern for the organization. As Mae commented, her organization felt anxiety about not fully understanding what “the grant is actually going to require.” Written documentation of roles and responsibilities and consistent communication bridged the tension created by inexperience in this area.

The YMCA had previous experience implementing a program, FMG, that addressed the achievement gap through summer academic and enrichment camps. The purpose and the structure of FMG mirrored the ELOP vision. This previous competency facilitated the planning and implementation of ELOP. There was clear resonance between the two programs. That same previous experience created a small barrier because the YMCA identified strongly with FMG and was not open to negotiating any change in programming at the start of the partnership. They came to the partnership with a complete program already designed. They held to the same implementation across all the districts where they implemented FMG. Part of their identity as an organization is to have a measurable impact on the community, and FMG represents a signature project. The consistency of FMG was very important to them. Due to the alignment of the program

with ELOP criteria, this insistence on the consistency of the program across various districts did not create a large barrier.

The place where previous experience created the most tension was with the programmatic design of the RSRPD summer camp. The organization identified its role in providing recreational activities to the community and felt anxious about entering into ELOP services, which required the inclusion of academic activities. In this case, the teams used previous enrichment experience to build an innovative program that met ELOP criteria and maintained the identity of RSRPD in the community.

Previous competency can create resonance with an emergent program, or tension can arise when the previous competency does not align with the new initiative. In cases where a CoP is traditionally defined by competence and experience, exposure to new practices from interactions at a boundary can lead to tension. This tension is typically resolved by constructing new learning and practices or, alternatively, by rejecting boundary processes. An emergent program is vulnerable if the community cannot negotiate common ground and maintain the participation of all members.

RQ(c): How Do the New Practices Align With the Shared Goal of the Initiative to Mitigate the Impact of COVID-19 Through Expanded Learning Services?

The purpose of this research question was to measure the alignment of implementation with the goals and vision of ELOP as described in AB 130. The law reads as follows:

The Expanded Learning Opportunities Program (ELOP) provides funding for after-school and summer school enrichment programs for transitional kindergarten through sixth grade. ‘Expanded learning’ means before school, after school, summer, or intersession learning programs that focus on developing the academic, social, emotional, and physical needs and interests of pupils through

hands-on, engaging learning experiences. It is the intent of the Legislature that expanded learning programs are pupil-centered, results-driven, include community partners, and complement, but do not replicate, learning activities in the regular school day and school year. (California State Assembly, 2021)

The intent is to analyze how the teams were able to negotiate a program that fulfills the objectives outlined in the law. Actual student data is not within the scope of the study.

Before establishing new practices, the dyads had to first define the shared project through the development of a common vision. This alignment of purpose defined the domain and provided a framework for all the new practices. As the teams engaged in new learning, the common understanding of the shared project guided the new practice development.

Mirroring the preceding subquestion, the alignment of the organization's overall mission with ELOP criteria and the alignment of previous competency with ELOP criteria played pivotal roles in either facilitating or impeding the formation of a shared vision. The extent to which the organization's overarching mission aligned with ELOP criteria influenced the cohesion and direction of the collaborative vision. Similarly, the resonance between prior experiences and ELOP criteria either eased or obstructed the process of forging a collective understanding and vision. The interplay between these factors underscored their significance in shaping a unified perspective and purpose within the collaborative framework.

Through negotiation during the planning phase, all CoPs came to a common understanding of the ELOP vision. As the teams moved into implementation, all programs met ELOP program and compliance criteria with only the small exception of

nutrition mentioned above. All the tensions negotiated in the planning phase were resolved as the teams moved into implementation.

The vision of ELOP was internalized into a new identity as the CoP members experienced successful implementation. In the interviews, participants shared narratives of success, including student and family experiences. This shared success impacted identity as the teams met the shared goal of the program.

RQ(d): How Does the Broker's Role Support or Obstruct Development of Community?

The work of brokering entails transferring knowledge and practices from one CoP to another through the broker's role (Wenger, 1998). Acting as a mediator, the broker actively participates in both CoPs and possesses the trust of each community involved. Managing the tensions and facilitating the learning that arises as the CoPs navigate the boundaries of their practices is a crucial aspect of the broker's role. In the context of this study, I assumed the role of a broker, facilitating the exchange of knowledge across teams and ensuring the alignment of programs with the criteria of the ELOP funding.

Wenger et al. (2002) advocated a purposeful approach to the design of boundary work between distributed communities, emphasizing activities that not only alleviate tension at the boundary but also cultivate a sense of community. The suggested framework encompassed four key activities: (a) fostering alignment among members, (b) establishing flexible structures that accommodate local variations within the broader community, (c) ensuring meaningful opportunities for connections, and (d) cultivating relationships through active engagement. The broker's role is instrumental in facilitating these activities to promote the development and sustainability of the CoP. In the context

of the present study, all four activities were present throughout the study. One additional broker activity also emerged in this study: managing indirect participants.

Fostering Alignment and Establishing Flexible Structures

The work to find a common vision for the program was essential to establishing the initiative. As an emergent program, there is not necessarily an understanding of the requirements and vision of the initiative at the beginning of the planning stage. In agreement with subquestion (c), the extent to which the organization's overarching mission aligned with ELOP criteria and the alignment between past competencies and ELOP criteria emerged as significant factors influencing the ease or hindrance of shaping a collective vision.

Establishing alignment in vision across all teams was a primary role of the broker in this study. In cases of misalignment, the broker had to find areas of agreement and build from those to design an innovative program that also aligned with funding criteria, as was the case with RSRPD. This work had to be a true negotiation where each organization felt part of the process. In the researcher's journal, I had various entries about balancing vision alignment with trust. As the broker, I needed to push toward a common vision without pushing too far and compromising the partnership.

The broker also ensured that each organization had the flexibility to plan and implement a unique program that reflected its identity as an independent entity and also aligned with ELOP criteria. For example, the FMG program was much more academic in structure, while RSRPD focused more strongly on enrichment. All elements of programming defined in ELOP legislation were present in both programs, but emphasis

was placed on areas that most reflected organizational identity. Allowing flexibility built trust and engagement, as seen in previous research subquestions.

Addressing tensions in alignment and fostering flexibility were crucial skills for effective brokering, contributing to cultivating a cohesive community and enhancing trust within that community. By navigating and mediating conflicting perspectives on alignment, the broker created an environment that accommodated diverse strengths within each organization while preserving their core missions. This balance fostered collaboration and empowered each organization to evolve and flourish in ways that aligned with their unique strengths and commitment to their missions.

Meaningful Opportunities to Connect and the Cultivation of Relationships

Interpersonal connection and the cultivation of relationships supported the success of the collaborative process with the ELOP summer programming. Every organization mentioned the importance of communication within the dyads. The variety of connections and communication allowed for a constant sense of alignment and being “on the same page,” as Mae mentioned in her interview. Regular meetings were scheduled to discuss complex issues and to make important decisions. In addition, emails and shared documents meant that we were in communication almost daily.

By addressing all issues quickly and problem-solving together, all teams felt supported and part of the community. Alison commented:

If there was an issue, you know, I could go to you with it. If you found an issue, you would bring it to me, and I just felt like that true partnership is really what helped everything feel manageable and like we could do it.

The quote summarizes how communication and connection with the broker lead to a sense of partnership and community.

As mentioned in the previous section, the researcher's journal reflected my concern as the broker to balance my desire for the program with cultivating relationships and trust. As I commented in one entry, "This year has to be a building year when we are learning to work together." An emergent program is vulnerable, and building community through communication and connection had significant value to the overall success of the collaboration.

Managing Indirect Participants

One area of brokering that created a challenge in the study was managing the indirect participants in the district–organization dyads. By this, I mean the peripheral staff that participated in some aspects of the ELOP summer planning and implementation without directly forming part of the team. For example, the administrative staff at all organizations took on extra work to complete registration. This staff felt the pressure of time and workload but did not necessarily feel community with the team. In the case of RSRPD, I decided to add supplemental funding to alleviate this extra work. The brokering, in this case, to solve the stress of extra work helped to form community by relieving internal organizational stress.

In the case of the YMCA, the brokering moved from facilitating communication and understanding between the school district and the partner organization to supporting work within the various departments of the school district. The use of district facilities meant that many district departments were superficially involved in the project. The broker's role shifted to managing the departments to provide the services needed to implement the programming.

In all respects, managing peripheral staff helped ease the burdens on the organizations in implementing an emergent program. A new program of this size involved far more than the small teams planning and implementing the programs. The constant problem-solving and negotiation of this indirect aspect of the partnership facilitated the success of the programs.

Chapter Summary

This chapter reviewed each case independently through the lens of three themes to provide a detailed understanding of the collaborative relationship in each organization–district dyad. A cross-case analysis then compared and contrasted the development of the three themes across all cases to analyze areas of tension and resonance. Finally, the chapter ended with a review of the research question and subquestions in relation to the guiding theory of CoP.

CHAPTER 5

DISCUSSION

The purpose of this study was to investigate the establishment of collaborative partnerships between a K–12 public school district and three external organizations tasked with developing and implementing an innovative summer program for elementary students through the ELOP. In the summer of 2023, the Simi Valley Unified School District collaborated with three nonprofit organizations to design and implement a summer program for underserved students in alignment with the state of California’s ELOP funding. The primary objective of the ELOP funding is to address the disproportionate impact of the COVID-19 pandemic on underserved populations, identified by the state of California as students from low socioeconomic households, English learners, and foster youth. This multiple case study examined the development of collaboration in each district–organization dyad. This chapter discusses the significance and relevance of the study in both the local context of the researcher’s professional role and in the larger field of education. The chapter begins with the proposal of an emergent theory based on the study’s results and then continues with lessons learned, limitations, and research implications.

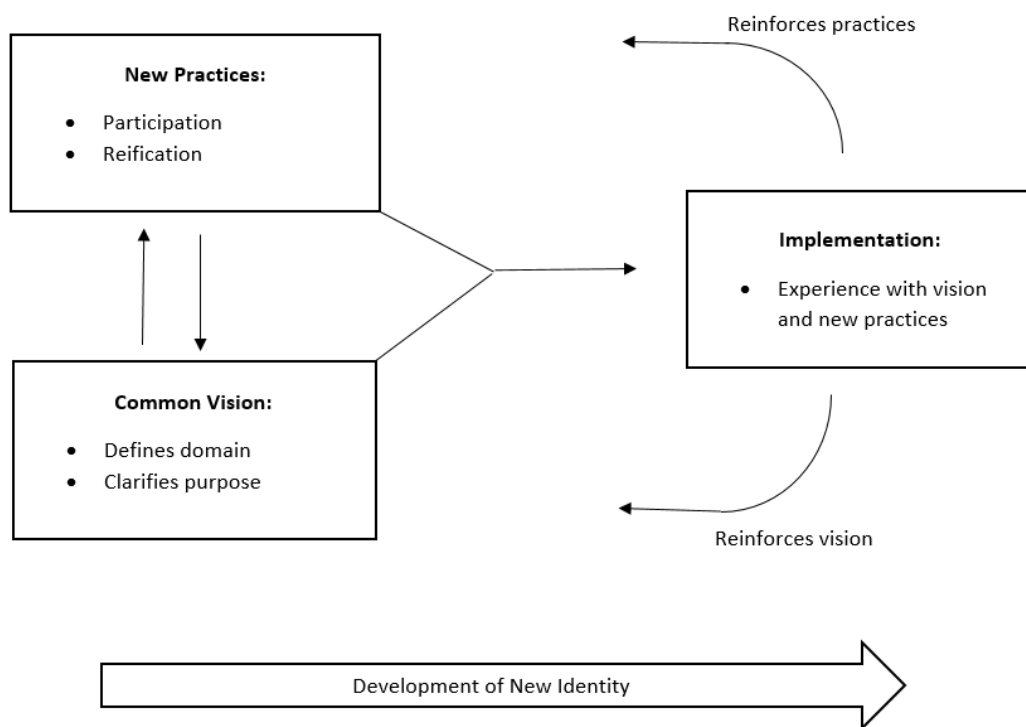
Emergent Theory

The research within the study had two clear phases: planning and implementing an emergent program. Each district–organization partnership planned together, but the actual implementation of the summer programming was the responsibility of the outside organization. This unique collaborative structure influenced the dynamic between the district–organization dyads. As a result, the planning phase became critically important to

ensure that all members understood the ELOP funding requirements and had designed an implementation plan that included those requirements. Alignment and implementation success reflected the dyads' work during the planning phase. Figure 2 visually represents the emerging theory as reflected in the study results.

Figure 2

Development of CoP in an Emergent Program



Planning Phase

As Figure 2 reflects, the planning phase consisted of two primary areas for team negotiation: developing a common vision and developing new practices. These areas of collaboration occur simultaneously. The vision for the project defines the domain of the work and clarifies the purpose of the teams. It is an essential component of framing the

work and moving toward alignment of the project to its intention, in the case of this study, to the intentions of the ELOP funding. As Wenger et al. (2002) stated, “A well-defined domain legitimizes the community by affirming its purpose and value to members and to other stakeholders” (p. 27). As seen in the results section, the natural alignment of the organizations’ missions to the ELOP vision created either resonance or tension as the teams negotiated a common vision. Regardless of the ease or difficulty of negotiating a common vision, clarifying the domain was a central component of the collaborative effort.

The second component of the planning phase was the new practice development, which required ongoing participation and reification of learning. Participation reflects continued engagement and connection to the shared project. A large, emergent program generates additional workloads for all team members, which can make the project vulnerable to disengagement, particularly when the project represents only part of the team members’ professional responsibility. Over the course of the interviews, every participant mentioned the extra work and the commitment the project entailed.

Wenger (1998) referred to participation and reification as a “fundamental duality” within a CoP that becomes a source of meaning. Reification works with participation to make the collaborative process visible through procedures, protocols, and documentation, among other group processes. As the teams worked together, they produced the objects themselves and also developed a manner of doing things. All teams came to the coloration with experience in summer programming, but ELOP required specific criteria. Again, tension and resonance were present when developing new practices based on alignment or misalignment with previous ways of doing things.

The arrows within Figure 2 between new practices and a common vision indicate how the two concepts feed off each other in the planning phase. The common vision informs how practices develop, and then the development of practices further shapes the vision. For example, the purpose of ELOP is to provide services to underserved populations. The particular needs of the target population impact the details of the practices that support participant access to the programming. From the other direction, the implementation of specific practices represents how the teams act on the vision, which provides additional nuance to the vision itself.

Within this space, as represented by the arrows, there is also meaning-making by team members as they start to form a new CoP. This process of meaning-making mitigates the tension of the extra work by providing purpose to the project. It is also a place of developing community, as teams learn to work and solve problems together.

One aspect of this process of making meaning is using narrative to create connection and membership within the group. Although the interview questions in this study did not specifically ask for narrative examples, participants offered this style of talk to describe the experience of planning. The narratives around the difficulty of the work abounded in the interviews, but they were told as part of belonging to the group. The stories not only focused on how the organization itself adapted to the new program but also on how the dyad managed the chaos of implementing a new program. For example, one interview referenced the work we did together to add younger students quickly; another referenced a story of negotiation around accepting more students than we had originally intended. The solution formed part of the story. There was this moment of chaos, then we worked through it. Narratives reaffirm both community and practice.

Implementation Phase

A line combines the two components (new practices and common vision), leading to the implementation phase. During implementation, the team members gain experience with the vision and the new practices. The experience and competence with the new project add to a sense of identity with the emergent program. As a new program, everyone started the planning phase with doubts and a lack of experience with this specific program. As the implementation moved forward, success and knowledge replaced inexperience.

Narratives of success play an essential piece in the identity-building of the implementation phase. Team members experience success through participation, so stories of that success become part of how teams create meaning. In this study, participants told many stories of student enjoyment, parent appreciation, their own new learning, and other examples of success. They are narratives of program value and team competence.

The success stories reinforce the common vision. In this study, the vision was to provide high-quality summer programming for underserved students. In addition, the narratives also reinforce all the work that went into the development of new practices. That work resulted in success and, therefore, holds value. The system, as described in Figure 2, reinforces itself and leads to developing a new identity as a new CoP dedicated to this project. The large arrow at the bottom of the figure describes the development of a new identity as ELOP providers and the development of a CoP aligned to that work.

Personal Lessons Learned

Two theories guided the research for this study: life course and CoP. Through the work of the study, I better understand how theoretical frameworks guide research. According to Creswell and Poth (2018), utilizing theory in action research provides a conceptual framework and intellectual foundation for understanding, interpreting, and guiding the research process. Theory also serves as a lens through which researchers can analyze and make sense of their observations and experiences, offering a structured way to interpret data and identify patterns. It helps researchers generate meaningful insights by providing a broader context and theoretical underpinning for their observations, enabling a deeper understanding of the complexities involved in the researched phenomena. By integrating theory into my action research plan, I enhanced the rigor of my inquiry and situated my research within the existing scholarly discourse. It added intentionality to the study, where I thoughtfully considered my research in comparison and contrast to the established theory.

Examining the COVID-19 pandemic through the lens of life course theory provided a valuable framework for understanding how students and the educational system experienced and adapted to the challenges brought about by the historical crisis. Life course emphasizes the interconnectedness of different life stages, considering how early experiences, transitions, and events shape later outcomes, all of which happen in a historical time and place (Elder, 1974). In the context of the pandemic, this theory provided me with a better understanding of how young children were impacted and how the educational system could provide services to improve the trajectory of students, particularly those from underserved communities. It created a foundation for the work of

the ELOP funding. Through life course, I could see how the pandemic created negative results across the whole population, but I could also see why certain populations fared worse. Young children from underserved populations are the most vulnerable. Life course exposed why ELOP funding was so critical in mitigating the impact of the pandemic.

Furthermore, life course encourages an examination of resilience and adaptation. It allows us to investigate how individuals and communities navigate and adjust to the challenges posed by the pandemic over time. Understanding these processes through a life course perspective provided me with insights into the dynamic interplay between personal agency, social support, and structural factors in shaping the long-term consequences of the COVID-19 crisis on individuals and societies. ELOP is one effort funded by the state of California to mitigate the impact of the pandemic on the most vulnerable students. I feel that understanding the implications of life course can help me better understand how and why children are impacted by events, but, most importantly, how the community can better serve students. As the dyads develop a stronger collaboration, research on high-leverage programming based on specific age-related needs could better focus decisions. Already in this first iteration of a summer program, I felt that many of my planning and implementation decisions reflected the life course propositions.

The second guiding theory, CoP, provided a framework for understanding how the teams worked together on a shared project and how that work created a new community on the boundaries of the two organizations. The state of California encourages school districts to work with outside partners to implement ELOP. The

initiative is large and vastly extends the school district's responsibility; partners help manage the enormous change.

Outside organizations bring specialized knowledge, skills, and resources that complement the goals of ELOP. I felt that collaborating with partners allowed for a broader range of expertise, enriching the learning experiences offered to participants. In my own experience, I often had to be aware of my specific perspective as a school educator to remember that this project differed from the school day and that my partners had expertise in outside-of-school activities.

The diversity of perspectives enhanced the program's content, delivery, and overall quality. At the same time, true partnerships require that each organization reframe its identity and adjust its practices within the context of the shared project. There was extensive work and intense negotiation to make that happen. At the end of the dissertation process, I could see where the theory fit into the specific dynamics of our collaboration teams. Even though each dyad was different, the theory of CoP illuminated the same processes of building a team. To reference Figure 2, the interaction of teams across the development of a common vision and the development of new practices combined with a successful implementation created a sense of team and belonging within the context of ELOP. As the broker, I was very much aware of my specific role in the change process. The knowledge enhanced my understanding of how my actions benefited or obstructed developing community.

Using theory to guide the change process is a valuable lesson I will bring into my own practice moving forward. I can already see where these two theories impact other

aspects of my professional work. Studying deeply both life course and CoP really situated my learning as a scholarly practitioner.

Implications for Practice

Establishing a significant interorganizational collaboration for an emergent program is a complex and challenging process, primarily due to the inherent differences between the organizations. I found that the first hurdle lies in aligning the visions and missions of the partnering organizations. Going into the research, I had not anticipated the challenge of this component of the project. Now I can see that I was entrenched in my individual perspective as a K–12 educator, and I did not recognize that my focus on academics would not resonate with all the partners. Each entity had its own set of goals, priorities, and ways of operating, making it challenging, in some cases, to find common ground. As the broker for the ELOP programming, I had to work to relieve tension and bring the teams to a common vision. One specific and essential implication is that bridging these divergences requires open communication, negotiation, and a willingness to compromise, laying the foundation for a common vision that aligns with the objectives of the shared project and respects the identity of each organization. Both sides had to commit and compromise.

Additionally, the logistical and ideological challenges of coordinating and integrating diverse organizational structures and processes require significant negotiation by all those involved. The start of an emergent program demands extra time and effort from team members who may have other responsibilities outside the shared project. The stress of launching the project can be overwhelming for teams. Many diverse departments within each organization can be indirectly impacted as all the new practices are

developed. Emergent programs are vulnerable to failure if teams disengage from an active role in collaboration and the reification that results from deep collaboration. My role as the broker was to help negotiate solutions but, just as importantly, to support meaning-making among the teams. I was in the work with them and reinforced the purpose of ELOP continually. I also think it helped to remind everyone that it was a pilot year and we were trying new things and learning along the way. This framed the overwhelming work as temporary and part of a process of learning together.

A dedicated broker can work at the boundaries of the teams. The broker must have the trust and support of both organizations. The central role of the broker is to alleviate tension and drive community development by managing learning and communication across organizations. The work within an emergent program has specific needs as the teams learn to collaborate and develop positive relationships.

Recommendations for Brokers

1. Take the time to negotiate a common vision for the project. This vision should respect and reflect the missions of all teams.
2. Communication is fundamental to an emergent program. Regular meetings combined with quick digital communication and phone calls ensure continued alignment to purpose and encourage community building.
3. Recognize the extra work inherent in an emergent program. Alleviate the work and stress when possible and emphasize that the workload will decrease as the teams learn and develop together.
4. Encourage meaning-making through narratives and a successful implementation process.

5. Develop trust within teams even when that requires compromise on objectives.

Limitations of the Study

This research was conducted in my local context with me as both researcher and participant. Future researchers should consider the limitations of this specific study when attempting to generalize the results. The most significant limitations of this study included two primary components of a qualitative study: subjectivity and the limited context of the study. They are described in further detail.

Subjectivity

Qualitative studies seek a deep understanding of a complex phenomenon in a situated context. The researcher's experience, personality, and values are not considered problematic but rather essential to finding and deconstructing truths (Bhattacharya, 2017). Researchers enter into the research with a positionality that informs their understanding of the subject and the research.

Positionality in qualitative research refers to the acknowledgment and examination of the researcher's own subjective position. Understanding and addressing positionality is important because it influences the study's interpretation and construction of meaning. As Bhattacharya (2017) emphasized, researchers need to recognize their own backgrounds, experiences, and values that may impact the research process, including data collection, analysis, and interpretation. Researchers can improve rigor and trustworthiness by being reflexive about one's positionality.

My positionality within this study was that of participant researcher. I was actively involved with all aspects of the project. I was also invested in its success.

Additionally, I represented the school district specifically and with many years of experience as a K–12 educator. The values and experience I brought to the study created a perspective from which I interacted with all the components of the study. To create awareness of my positionality, I engaged in reflexivity throughout the study, looking at both personal perspectives and methodological choices.

As discussed in Chapter 3, qualitative research generates a large quantity of data. I used the amount of data to triangulate themes and assertions across various data sources. I also allowed for member checking to ensure that my interpretation of participant perspectives was accurate. In addition, I kept a researcher’s journal to reflect on my thoughts and to note my emotional state regarding any events within the breadth of the study. By reflecting on both my thoughts and emotions, I was able to see any places of potential bias and also places where the data surprised me.

Adding reflexivity to all aspects of the research process helped me contend with subjectivity and, therefore, improved the quality of analysis (Braun & Clarke, 2021). As I considered the methodology, the choice of a multiple case study allowed for each dyad’s story to reveal itself in unique ways. Then, the cross-case analysis looked for common themes. This methodological choice allowed for the individuality of experience to appear before any comparisons were made. The methodology reflected the structure of the collaborative relationships and allowed the research to explore individuality and their commonalities. Reflexivity was also important throughout the coding and generating of themes. I worked inductively and deductively. I reviewed the data, looking for potential relations to the research questions I had previously formulated. Then, I returned to the data to read it for any new ideas I had not previously considered. I found myself surprised

by the data at various times. By allowing for new ideas to emerge in the data, I checked my bias and my expectations for specific results.

Limited Context of the Study

The context of the study is specific to my work and the organizations that were available to me for the collaboration. All three organizations are nonprofits with a strong sense of mission and strong historical ties to the community. These organizations not only serve as essential pillars of community support but also possess a strong sense of purpose to impact our local community positively. This context shaped the dynamics of the collaborative relationship, influencing how the dyads navigated and processed their involvement.

A different context, including for-profit organizations, might change how dyads process collaborative relationships. For-profit entities may introduce different motives, priorities, and decision-making processes, thus influencing how the dyads engage in and perceive the collaborative relationship. In the context of this study, despite differences in mission and previous competency, all team members came from a background of nonprofit and community work.

Adding to the similarities in mission across all dyads, the intention of ELOP to improve the outcomes for underserved students encouraged meaning-making for all teams. We were serving a population that needed support, and our efforts to provide high-quality summer programming could significantly impact our community. As organizations dedicated to community impact, ELOP matched our organizational priorities. A project without that inherent meaning could impact the engagement of team members when tensions arise.

All organizations in the study had preexisting connections with the district. Whether through on-campus childcare or the implementation of federal programs like the one with the BGC, these organizations established a working relationship with the district. This preexisting collaboration provided a solid foundation for collaboration and created a strong incentive to maintain and further strengthen these ties. The partnerships will continue into the future, not only with previous initiatives but also with future ELOP programming. Therefore, there was significant motivation to make the initiative successful.

This multiple case study was designed to be instrumental in that the central phenomenon seeks to understand how school districts and outside organizations can negotiate a shared project, but there are limits to the generalizability. The number of dyads and participants was small. Despite the limited context, some recommendations can be made, as will be discussed in the next section.

Implications for Research

Action research is a dynamic and participatory approach to inquiry that involves systematic and reflective investigation of real-world problems of practice within a specific context (Mertler, 2019). Action research aims to bring about innovation and change in the practices and conditions under study. This iterative process involves identifying a problem, planning and implementing interventions, collecting and analyzing data, and then making adjustments based on the findings. Through cycles of reflection and action, participants in action research contribute not only to the expansion of knowledge but also to the enhancement of practical solutions and outcomes. One cycle leads to the next in an iterative cycle.

Future research cycles could address the following questions related to CoP: What are the processes to further develop the interorganizational partnerships in the 2–3 years of implementation? How do CoPs evolve and transform their boundaries over the long term, and what factors contribute to such changes? How can leadership strategies foster inclusivity and collaboration while respecting the autonomy and identity of the partner organizations? How does identity with the ELOP program evolve over multiyear participation in interorganizational partnerships? These topics continue the current cycle of inquiry and continue into the future to explore the evolving collaboration and uncover additional nuances of that collaboration.

Moving away from CoP to life course, potential research might look at the trajectories of children who participated in ELOP services. Such questions might include the following: Does multiyear participation in ELOP services impact school performance in academics and well-being? What is the impact of ELOP services on family well-being? Does participation in ELOP mitigate the achievement gap? This line of inquiry works with the components of life course to investigate how the impact of the pandemic is mitigated by participation in ELOP. It connects the purpose of the funding with the end results of community impact.

The potential future cycles of action research examined how the educational system can leverage funding to develop high-quality programs for underserved students. It is an opportunity to delve into the dynamics of funding sources and their impact on developing targeted programs for underserved students. Partnerships with other organizations leverage the larger community to better serve students through innovative programs. Ultimately, these future research cycles provide an approach to enhancing the

educational experience for underserved students by optimizing the strategic use of available financial resources.

Closing Thoughts on the Action Research Dissertation

This dissertation partially revealed the dynamics of large-scale collaboration to develop and implement an innovative project. As the broker between the organizations, I needed expertise in best practices for summer programming, best practices for engaging underserved populations, and detailed knowledge of all the nuances of ELOP funding criteria and compliance indicators. Beyond that knowledge, it was also imperative that I become an expert at developing community and collaboration in our teams. The relationships across and within organizations had a tremendous impact on the project's success. This initial building of trust and teamwork will influence the effectiveness of the teams in the summers and years ahead.

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APPENDIX A
INTERVIEW PROTOCOLS AND QUESTIONS

INTERVIEW QUESTIONS

Thank you for taking the time to sit with me and participate in the interview process. I wanted to assure you that the interview is outside of my role as the Assistant Director of Early and Expanded Learning. During this interview, I will be working exclusively in the role of researcher. Your answers will only be considered as part of the research process. Please speak your truth. This is a conversation. All identifying information will be kept confidential throughout the research process.

May I audio-record this interview? You will have the opportunity to review the transcript and recommend any changes to the text.

My research topic relates to the collaborative process between the school district and outside organizations to develop an innovative program for underserved students. In particular, I am studying the summer programs funded through the Expanded Learning Opportunities Program (ELOP).

Background

1. Can you describe your role within your organization? How long have you been in this role?
2. Can you describe your role in the planning and implementation of the ELOP summer program?

Questions After Planning

1. Have you noticed any shifts in child development, behavior, or overall well-being since the pandemic? How has that caused your organization to shift services in any way? Can you think of any instance in particular?
2. What is the overall goal or mission of your organization? And in regards to services for children?
3. Can you describe the ELOP goals and vision? Can you describe the compliance indicators?
4. Do you feel that ELOP's goals and vision align with your organization? In what ways?
5. In what ways has ELOP changed your organization's regular summer programming? Can you think of a specific example?
6. Do you feel that the ELOP summer program will help mitigate the pandemic's impact on child development?
7. What have been your concerns as we planned the summer programming? Were there any moments of tension?

8. Can you think of anything that helped to smooth out concerns? Was there anything that increased concerns?
9. Was the communication between the district and your organization sufficient to really collaborate and develop a high-quality program? Can you think of a moment of problem-solving between teams?

Questions After Implementation

1. How do you feel that the summer implementation went overall? Can you describe a moment of pride? Or frustration?
2. Do you feel that summer programming helps create positive change in child development after the pandemic? How? In what ways?
3. In what ways did the summer ELOP program serve the needs of families and children?
4. Did the summer program meet the goals of ELOP?
5. Did the services align with your organization's goals and vision for summer programming? In what way?
6. How effective was the communication and collaboration with the district during the implementation? Can you recall a moment of problem-solving during the implementation phase of the program?
7. Looking to next year, what aspects of the summer programming would you like to keep? What would you like to improve or drop?

APPENDIX B
OBSERVATION PROTOCOL

OBSERVATION PROTOCOL

Date:

Time/Duration:

Location of the Observation:

Focus of the Observation:

Participants:

Diagram of the Space:

Observation	Notes

APPENDIX C
CODEBOOK

CODEBOOK

How do team members from different organizations negotiate the development of a viable plan for the implementation of a new initiative?			
a. What new practices develop as they work together on a shared project?			
b. What competencies from their previous domains support or obstruct new practice development?			
c. How do the new practices align to the shared goal of the initiative to mitigate the impact of COVID through expanded learning services?			
d. How does the role of the broker support or obstruct development of community?			
name of code	shortened	description	textual example
vision	V	Vision refers to the vision of the organization or the district	The Expanded Learning Opportunities program provides enriching academic and experiential learning to engage students in year-round opportunities for success. SVUSD ELOP provides equitable opportunities for all students by creating independent learners through intentional programs. (ELOP Plan 2023-2026)
community	C	community refers to a sense of common purpose across the organizations	True partnership is really what helped everything feel manageable and like we could do it (interview planning Y1)
problem solving	PS	problem solving refers to the negotiation of a solution to a complex or difficult issue. It may result in a new practice or only overcome a short-term obstacle.	The interpreters contacted me today. here is a family with 6 children. 4 are SPED. They qualify for ELOP and would like a summer plan. The interpreters were able to get the four into ESY, but mom would like a plan for all 6. BGC is willing to take all 6 for the time period of ESY. Two will go all day and the four SPED will be dropped off by transportation. I was not surprised that BGC is willing to take them, but I am so appreciative. It was a big ask.
new practice: logistics	NPL	new practice: logistics refers to emergent non-programmatic changes due to the implementation of ELOP services. (technology, registration, food services, etc.)	SVUSD agrees to fund ELOP eligible students for four weeks of summer services for students in TK through 6th grade through two session choices provided at the BGC Clubhouse (MOU BGC)
new practice: program	NPP	new practice refers to emergent programmatic changes due to the implementation of ELOP services	It (ELOP) allows us to kind of expand what we're doing and build upon what we're doing. (BGC1 interview)
negociation: program	N	negociation about the program refers to negociation about programmatic decisions specifically the blending of the ELOP requirements with the past program implemented by the organization	We discussed the summer programming and the tweaks we would like to make for next year. The conversation centered around two main ideas: the change in leadership roles at the site and the organization as well as the programming for summer using belexcel and the STAR testing. (meeting notes 9/15)
negociation: logistics	NL	negociation about the logistics refers to negociation about logistical decisions to blend the two programs including snack, registration, custodial help, etc.	Registration priorities will begin with current students, then students at FMG schools, then opened to all ELOP students (FMG meeting notes 2/7)
broker influence	B	The broker influence refers to the way in which the broker bridges the CoPs from the district to the organizations	You are on the front lines. You are the one doing all of that for communication coordination within your own district. So I felt like I didn't ever have to like really be overwhelmed or concerned with it.
alignment	A	alignment refers to the shared agreement between ELOP requirements and the program plans for the summer programs	They will do parent education as part of the program this summer. That aligns well with the quality standards. I will be excited to see how that piece works. (RJ 2/7/23)
communication	COM	Communication refers to interactions and exchange of information between CoPs in person or through email	I think if we would have met every week, We would have stalled out on some things like maybe just not enough movement had happened where we needed it to. In that, you know, within one week, I think 2 weeks was a little bit more realistic to actually be able to bring to the table new information that we needed to discuss. (interview planning Y1)
concern: program	CP	concern: program refers to the concerns/ conflicts related to the programmatic aspects of the summer services	They talked about the consistency of the program . They don't want services for ELOP students that are different from the other students. I will have to check my ideas. This means that I won't be able to offer as much as I could to the students, but it may need to happen to maintain the relationship (RJ 2/21/23)
concern: logistics	CL	concern: logistics refers to concerns/conflicts related to logistics which includes the non-programmatic pieces of the collaboration including technology, registration, food services, recruitment	We finally closed all registration for the summer programs which is a huge relief for me. I feel like there are a lot of details to iron out to make the process smoother for families, for the organizations, and for the district. like I have more time for other things. (RJ 5/31)
org: leadership	OL	Organization leadership refers to the influence of the board and other leadership in the development of a joint enterprise with SVUSD	The RSRPD board is concerned about too much change with ELOP (meeting notes 2/21)
org: employees	OE	organization: employees refers to the input or concerns of the organizations regular employees that must assist the ELOP programming but may not be directly related to planning.	The registration tech is turning out to be an obstacle. I will need to register and check eligibility and then RSRPD will need to put them in the system, but in a way that is different than their standard registration process. I worry that the secretaries and admin staff will get tired of this extra work. I didn't think of all the people who have to cooperate with the program to make it successful but are not part of it exactly. (RJ 3/14/23)
identity	I	Identity refers to the individual identity of the organization separate from the joint enterprise with SVUSD	RSRPD worries about the integrity of their program with the introduction of ELOP (meeting notes 2/21)
roles		Roles refers to the function or responsibility expected of a party within a process of developing and implementing the program	Field trips will be funded for ELOP eligible students in a manner to be jointly agreed up by both parties or by the District to meet needs of ELOP reporting. RSRPD will plan and implement field trips including transportation and any fees. Field trip locations will be determined in collaboration with RSRPD and SVUSD. Trips will be developmentally appropriate and supervised by RSRPD. (MOU RSRPD)
SVUSD: other departments	OD	SVUSD other departments refers to the interaction of the broker with CoPs outside of the summer planning and implementation CoPs that control some aspect of the program. Examples include custodial, food services, and IT	The tech is still an issue for FMG. I do not have the copy cards or the internet in the rooms. I was able to get access to the STAR assessments, but that was because I did it directly through a colleague rather than through IT. The IT department is unresponsive in so many ways. I didn't anticipate being stifled at every turn as we started to get the program up and going. (interview Y2)
previous competency	PC	previous competency refers to a skill or practice that was previously developed before the start of the summer program. The organizations entered the collaboration with this skillset or practice	I think the biggest thing that ASES has done with us is kind of give us a you know template format in terms of direct services... We have a really good understanding in terms of what the student need is. (interview B1)

positive of ELOP	PE	positive of ELOP refers to statements that express a positive way of thinking or feeling about the ELOP program	(ELOP) really allows us the flexibility and the creativity to really plan some really key programs that can... What we feel is best going to help complement some of the things that we're doing in the ASES program (interview B1b)
negatives of ELOP	NE	negatives of ELOP refers to statements that express a negative way of thinking or feeling about the ELOP program	I think well, logistically, it hasn't been easy, just because of like registrations and enrollments. And like all of like the office admin stuff that's been a lot of work (Interview PR1)
Impact COVID	C19	impact of COVID refers to the effect of the COVID pandemic and the closing of schools on young children and the impact on expanded care programming	a lot of members experienced 2 years of being home. So in terms of the social interaction that you have like, maybe when you're in kindergarten, right in terms of things like sharing, or, you know, communicating or just sitting next to somebody, or playing Legos, that that type of thing was lost .
working w/ UPP	UPP	working w/ UPP refers to attitudes and knowledge about working with underserved communities	I think really is, you know, about re-engaging students and providing experiences and opportunities for them. And again, I always go back to access . It's really about, how do we provide access? (interview B1)
finding meaning	FM	finding meaning refers to expression of meaning making in regards to the ELOP programing	I think it will make a difference, because it's providing them with those extra opportunities that they might not have during the day, or just might not have at all. (interview PR1)

APPENDIX D
IRB APPROVAL

IRB APPROVAL



EXEMPTION GRANTED

Amanda Boutot
Division of Educational Leadership and Innovation - Tempe
-
amandaboutot@asu.edu

Dear [Amanda Boutot](#):

On 5/25/2023 the ASU IRB reviewed the following protocol:

Type of Review:	Initial Study
Title:	Collaborating to Innovate: How School Districts Work with Outside Organizations to Design and Implement a New Program
Investigator:	Amanda Boutot
IRB ID:	STUDY00017931
Funding:	None
Grant Title:	None
Grant ID:	None
Documents Reviewed:	<ul style="list-style-type: none">• 0042_001 (1).pdf, Category: Other;• BGC_research permission.pdf, Category: Other;• Informed Consent_ (3).pdf, Category: Consent Form;• IRB Social Behavioral Protocol 2 2023.docx, Category: IRB Protocol;• Recruitment email_.pdf, Category: Recruitment Materials;• recruitment_methods_04-25-2023.docx.pdf, Category: Recruitment Materials;• Research Permission_YMCA_signed.pdf, Category: Other;• RSRPD_research permission (1).pdf, Category: Other;• Supporting Documents 25-04-2023.pdf, Category: Other;

The IRB determined that the protocol is considered exempt pursuant to Federal Regulations 45CFR46 (2)(ii) Tests, surveys, interviews, or observation (low risk) on 5/22/2023.

In conducting this protocol you are required to follow the requirements listed in the INVESTIGATOR MANUAL (HRP-103).

If any changes are made to the study, the IRB must be notified at research.integrity@asu.edu to determine if additional reviews/approvals are required. Changes may include but not limited to revisions to data collection, survey and/or interview questions, and vulnerable populations, etc.

Sincerely,

IRB Administrator

cc: April Jacobsen
April Jacobsen