What We Can Do to Build More Relevant, More Effective Adult Foundational Education Systems

Tools for Those
Open to Changing their Minds about AFE

Book Two in a Two-Book Collection of Messages Posted to the NLA Discussion Group in September-December 2024

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Cover "Tools" photo by Paul Jurmo

Introduction

As explained in "Summary" below, this Book 2 (titled *What We Can Do to Build More Relevant, More Effective Adult Foundational Education Systems*) presents seven messages that I posted to the on-line NLA Discussion Group from early November to late December 2024. These seven messages describe actions that AFE advocates and other interested stakeholders can take to plan, pilot, secure resources for, build leadership for, and further develop substantive reforms of AFE systems at national, state, local, and program levels in the United States.

This Book 2 is preceded by a Book 1 titled *Voices for More Relevant, More Effective Adult Foundational Education Systems: Tools for Those Open to Changing their Minds about AFE.* That first volume presents eleven messages that I posted to the NLA Discussion Group from early September to early November 2024. Those messages presented a series of arguments made over nearly five decades for multi-purpose AFE services that effectively respond to a wide range of learner and community needs. Readers are encouraged to read both volumes, starting with Book 1.

As I did in the Introduction to Book 1, I here:

- thank David Rosen (my good colleague and long-time moderator of the NLA Discussion Group) for the opportunity to share these two sets of messages with other supporters of adult foundational education.
- thank those who take the time to read, consider, and share these messages.
- salute the many people and organizations whose outstanding work is cited in these two volumes.

I look forward to further constructive dialogue and action to build more relevant, more effective AFE systems – at all levels and in all corners of our field.

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January 23, 2025

Summary

This Book 2 is the second of two collections of messages that I posted to the on-line NLA Discussion Group from September through December 2024. The first set of eleven messages (originally posted from early September to early November 2024) are now compiled in the accompanying Book 1 titled *Voices for More Relevant, More Effective Adult Foundational Education Systems: Tools for Those Open to Changing their Minds about AFE.* Those eleven messages presented arguments made by dozens of AFE experts and advocates over four decades for multi-purpose adult foundational education (AFE)[1] systems customized to the diverse interests and strengths of adult learners and the communities they participate in.

This second volume (titled *What We Can Do to Build More Relevant, More Effective Adult Foundational Education Systems)* presents lightly-edited versions of seven additional messages that I posted to the NLA Discussion Group from early November to late December 2024. This Book 2 outlines seven actions that AFE advocates can take to move beyond critiques of current AFE (though those critiques can be important) and broad recommendations for needed improvements. It presents more-detailed steps that AFE providers and other stakeholder partners can take to:

1. comprehensively assess the strengths and needed improvements of current AFE services.
2. develop a vision and plan for more effective AFE systems.
3. carry out collaborative pilot projects in which AFE providers and other stakeholder partners respond to particular basic-skills-related needs and opportunities in communities. (Those projects would help the learners and community partners involved while also creating program models, partnerships, and professional staff that can be used for longer-term AFE systems reform.)

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[1] *Adult foundational education (AFE)* is used in this document as an umbrella term encompassing the mix of services sometimes called "adult literacy," "adult basic education," "adult secondary education" (or "GED/HSE preparation"), ""ESL/ESOL," and contextualized education for workforce/ workplace literacy, college preparation, citizenship preparation, family literacy, financial literacy, and other applied uses of basic skills. This term helps distinguish our field from K-12 and for-credit higher education and other activities that might fall under the heading of "adult education." It was first introduced in 2021-2022 by the Open Door Collective, which encouraged adult education stakeholders to incorporate it into how they talk about the field. The above definition is my own, continually evolving interpretation of the term.

4. identify supports that AFE systems reform efforts would require and potential providers of those supports.
5. communicate with potential supporters to secure needed supports.
6. build the leadership needed for efforts to substantively reform AFE.
7. think, talk, and act in new ways that support reform of AFE.

(Book 1 and Book 2 draw heavily on a series of other documents I have written – with the help of colleagues -- between 2018 and 2024, most of which present arguments and program models similar to those now presented in these new volumes, Book 1 and Book 2. Those earlier documents can be seen at www.pauljurmo.info .)

Book 2 concludes with this message:

> *AFE systems reform need not be seen as a pie-in-the-sky goal that maybe someone else can undertake one day when (a) the political climate is different; (b) the economy is generating funds (e.g., public taxes, corporate profits) that can be invested in government or non-governmental AFE projects; or (c) AFE leadership gets around to recognizing the need for systems change and figures out how to make it happen. Put another way: Spinning our wheels won't help AFE respond effectively to the challenges and opportunities that learners, their communities, and our field now face.*

> *While it might be helpful to have a new version of the National Institute for Literacy or other federally-supported entity take the lead in organizing a national reform initiative, it might be that change can and must be nurtured within a variety of governmental and non-governmental entities at not just national but also at state, local, and program levels. Again, past and current models of such initiatives . . . have produced good models of contextualized instruction and collaborative AFE partnerships, experienced practitioners, and financial and in-kind resources. No need to start from scratch and reinvent the wheel. Those previous models should be learned from and adapted to create AFE systems relevant to today's realities.*

> *Leadership for more effective AFE systems can come from– and is already brewing in – diverse stakeholder groups, levels, and individuals within our profession. Those willing to think, talk, and act differently should – with humility, respect, imagination, discipline, and courage -- speak up and begin working together in the new period we are now entering.*

Action #1

Conduct a Clear-Eyed, Evidence-Based Assessment of the Strengths and Limitations of Current AFE

November 7, 2024

We will need better "problem statements" to guide us if we want to build more effective AFE systems to support the learners and communities we want to serve.

Typically, AFE uses a limited range of numbers (e.g., estimates [from PIAAC, census data, or other sources] of the individuals who have basic skills limitations) and anecdotes (e.g., adult learner stories about the challenges they face and the successes they've had in AFE, similar stories told by employers) to generate resources and plan services. While such numbers and stories can be helpful, they don't provide a comprehensive picture about the more complex realities that AFE is presented with.[2]

If we are to develop more effective AFE systems that are designed and supported to respond to particular learners and communities, we need more comprehensive, holistic assessments (sometimes referred to by such terms as "scan" or "community needs assessment") of the challenges and opportunities that impact not just adult learners but the communities they are part of and AFE itself. In short, we need to adapt "systems thinking" to our work and use assessment and other practices that support effective AFE systems.

As an example, let's consider what a local coalition of AFE providers might do to identify the challenges and opportunities that adult learners, community stakeholders who are impacted by adult basic skills issues, and local AFE providers face.

The local AFE network might create a Community AFE Planning Task Force composed of AFE providers and other stakeholders (e.g., researchers at a local university or community college; representatives of employers, labor unions, or economic development offices; representatives of K-12 schools and/or providers of healthcare, prisoner re-entry, disabilities, or other services) who have the interest and capacity to contribute to a community AFE assessment. The Task Force would:

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[2] For more on this, see *First Things First: Re-Map "The U.S. Adult Literacy Problem* <https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/First%20Things%20First%20-%20Jurmo%204-22.pdf?ver=1729788056585 >)

Step 1: Clarify the audiences, information, and purposes that the assessment might focus on.

The Task Force might adapt the following grid to map out those elements:

Who are the audiences?	What information do they want?	What might the information be used for?
Planners of AFE services	- Who are the learner populations that might be served by AFE? - How does a lack of basic skills, high school certificates, …. impact their lives as workers, family members, and members of local neighborhood groupings? - What has been their experience (if any) as students in AFE programs? - What factors might support or discourage their participation in an AFE program? - Who are the community stakeholders who have (or might have) an interest in the basic skills issue (and what are their interests, concerns, etc.)? - What if any experience have those stakeholders had working with AFE	- To guide planning and/or resource generation for AFE services. - To support communication/ collaboration with other stakeholders.

	providers? • Might they be willing to support or otherwise get involved in AFE efforts in any way?	
Providers of financial and in-kind resources	Same questions as above as well as: • What are the financial and in-kind resource needs of AFE providers? • What has been AFE providers' experience working with providers of funding and in-kind resources to date?	To help potential and actual resource providers to understand the resource needs of AFE providers and how to work with AFE services.
Other community stakeholders who might be impacted by the "adult illiteracy problem" (e.g., K-12 schools, healthcare providers, correctional/re-entry services, immigration and refugee services….) and who might work with AFE programs	• Who are the adult populations who have various kinds of basic skills-related needs (e.g., lack of basic skills, high school certificates, ….)? • How do those individuals impact the performance of local community stakeholders (e.g., K-12 schools, employers, labor unions, providers of healthcare and other services)? • What has been the experience (if any) of those stakeholders working with AFE programs? • Might those stakeholders be willing to support or	To help community stakeholders understand whether and how they might work with adults who have basic skills needs and/or with AFE providers.

	otherwise collaborate with AFE efforts? • What questions do those stakeholders have about working with adults who have basic skills challenges and/or with AFE providers?	

Step 2: Identify the research questions, information sources, and information-gathering activities to use in the community AFE assessment.

The Task Force might adapt the following grid to map out a framework for the information-collection process.

Research Questions	Information Sources	Information-Gathering Activities
• **Who are the adults who face various kinds of basic skills-related challenges including** lack of various kinds of basic skills (e.g., oral English, written English, numeracy, basic digital skills, other)? • What are key applications of those skills that they need those skills for (e.g., to help their children succeed in school, to deal with health issues, to manage their finances, to get a job or perform a job), to interact with neighbors, to understand their rights and	• Current learners in AFE programs • Past participants in AFE programs • Other adults who have basic skills challenges who have not participated in AFE programs • AFE service providers experienced working with adult learners • Other stakeholders who in various ways work with adults who have basic skills challenges (e.g., employers, workforce service providers, labor unions, correction and re-	• Review of U.S. and state census data and other data regarding income, housing, occupational, educational achievement of community residents • Review of relevant PIAAC data • Interviews and/or focus groups with relevant information sources • Review of records from AFE programs • Review of relevant reports from the field about these questions.

responsibilities as community members….)? • What if any experiences (e.g., successes, frustrations) have those adults had in AFE programs? • What factors (e.g., work or family duties, prior negative experience in education, lack of self-confidence or understanding of what goes on in an AFE program, health issues, lack of transportation) might make it difficult for those individuals to participate in and succeed in an AFE program? • What strengths might those individuals bring to participating in an AFE program (e.g., prior education; knowledge of other cultures and languages; background knowledge relevant to work, family, or other roles; digital skills and access to digital technologies and Internet; family support for their participation; transportation….)?	entry service providers, healthcare providers, K-12 schools) • Relevant reports from the field about these questions.	
• **Who are other community stakeholders** who might be impacted by	• AFE providers who have worked with – or have considered working with – other	• Interviews and/or focus groups with AFE providers who have worked with – or have

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the "adult illiteracy problem" (K-12 schools, healthcare providers, correctional/re-entry services, immigration and refugee services….) and who might work with AFE programs? • Who are the adult populations who have various kinds of basic skills-related needs (e.g., lack of basic skills, high school certificates, ….) who interact with those community stakeholders (as customers, employees, etc.)? • How do those basic-skills-challenged individuals impact the performance of local community stakeholders (e.g., K-12 schools, employers, labor unions, providers of healthcare and other services)? • What has been the experience (if any) of those stakeholders working with AFE programs? • Might those stakeholders be willing to support or otherwise collaborate with AFE efforts?	community stakeholders. • Representatives of those other community stakeholder groups. • Relevant reports from the field about how AFE might collaborate with other stakeholders.	considered working with – other community stakeholders. • Interviews and/or focus groups with representatives of those other community stakeholder groups. • Review of relevant reports from the field about how AFE might collaborate with other stakeholders.

• What questions do those stakeholders have about working with adults who have basic skills challenges and/or with AFE providers?		
• **Who are current public and private providers of financial and in-kind resources to AFE programs?** • What has been their experience to date in working with AFE providers? • What are the current and possible future financial and in-kind resource needs of AFE providers? • What has been the experience of AFE providers in working with providers of funding and in-kind resources to date? • What might be done to increase and strengthen investments in AFE efforts by current providers of financial and in-kind supports? • What other providers of financial and in-kind support might be approached to get involved in local AFE efforts? • How might they best	• AFE providers. • Representatives of providers of financial and in-kind support who have already supported AFE. • Representatives of providers of financial and in-kind supports who have not (yet) supported AFE. • Reports (from AFE providers, the media, and providers of financial and in-kind resources) that might be relevant to AFE programs. • Fundraising guides and other relevant documents developed by the field related to how AFE can generate resources from various sources.	• Interviews and/or focus groups with AFE providers. • Review of reports from local AFE providers that describe financial and in-kind supports they have received. • Interviews and/or focus groups with representatives of organizations that have already provided financial and in-kind supports to AFE. • Review of reports from the AFE field more generally showing how AFE providers can work with providers of financial and in-kind supports.

support AFE?		
• **Who are the current AFE service providers in our urban (metropolitan) area?** • What AFE and other services do they provide? To what learners? Do they also provide services to other stakeholders (e.g., employers, K-12 family education programs, correctional facilities, labor unions, healthcare providers …)? • What financial and in-kind resources do they use? From what sources do they get those resources? • What are these AFE efforts achieving for learners and other community stakeholders? • What are gaps in the quantity, quality, and capacities of these AFE services?	• Staff of AFE programs • Reports from AFE providers • Adult learners in those programs • Other stakeholders that those AFE providers collaborate with	• Interviews and/or focus groups with relevant individuals listed to the left. • Review of reports from AFE providers and other relevant stakeholders.

Step 3: Develop and field-test a sample of the above data-gathering tools and activities.

The Task Force should assign a small team of qualified people (i.e., with adequate understanding of the purposes and content of the data-gathering activities and expertise in conducting interviews, etc.) to carry out some of the above data-gathering activities. As they do so, they should record the responses they receive; organize and summarize them in clear, succinct documents; then share those documents internally within the Task

Force. Organize information in ways that demonstrate (a) the strengths (e.g., interests, capacities) of actual and potential learners, AFE providers, other community stakeholders, and providers of financial and in-kind resources) and the limitations (challenges they face, gaps in their capacities) of each group. Doing so will generate a report that helps readers understand who the key players are in the AFE system and the opportunities and challenges the system faces.

Field-testing of the data-gathering tools and methods and of how the resulting information will be organized and presented will allow the Task Force to decide how to move forward with additional data-gathering and presentation of findings. This might require some revising of the original information-gathering instruments; training of those collecting, organizing, and presenting the resulting information; and selection of information sources.

Step 4: Continue with data-gathering and prepare a report to share with the audiences identified in Step 1.

The resulting report should contain the purposes and audiences for the assessment, the methodology and sources used, key findings, and recommended actions. It might be followed by appendices (possibly in a separate document) showing data-gathering instruments used, people involved, etc. It should also contain an executive summary with the key information and recommendations for the various audiences.

Task Force members should then share the report with their identified audiences, in written form and/or in meetings aided by slide presentations.

Step 5: Based on feedback from the audiences, use the report to generate a simple but comprehensive problem statement to guide further planning of a community AFE reform (improvement) initiative.

Such a problem statement might adapt the following content, tone, and "look" and use more-specific information generated by the above community assessment:

> *In our community, significant numbers of adults and out-of-school youth are challenged by inadequate written and oral language, numeracy, digital literacy, research, or other foundational skills they need to perform rewarding, meaningful work, family, civic, and lifelong learning roles. Those adult basic skills limitations can have a variety of roots, including disabilities, health problems, inadequate schooling, difficult life circumstances, limited prior use of English, or other systemic factors.*

> *Despite these challenges, these adults often also possess significant strengths (e.g., technical and cultural knowledge, language skills, creativity and positive motivations, and family and community support systems) that they bring to their*

lives and society. But their basic skills limitations can have negative implications for those individuals and their families and communities. This is especially true if basic skills limitations are coupled with gaps in (a) required academic (e.g., high school equivalency) diplomas or occupational credentials or in (b) subject-matter knowledge, social-emotional strengths (e.g., self-efficacy, social confidence), and/or support systems.

Well-designed and -supported adult education services—including programs that partner with healthcare providers, employers, labor unions, employment centers, prisoner re-entry agencies, and other stakeholders—have demonstrated their ability to help adults develop the basic skills and other assets they need. However, such services are themselves challenged – by inadequate funding, long waiting lists, and a lack of recognition as a vital resource for our nation.

Potential adult learners and the adult education partnerships that serve them thus face multiple, often-interwoven challenges. Overcoming those challenges will require collaborative planning, implementing, and sustaining of systems of high quality educational and other supports for adult learners. Such systems can build on valuable past work and more recent innovations in adult education.

(For an assessment of the strengths and limitations of our current national collection of AFE services, see "Our Adult Foundational Education Report Card," which is Book 2 of the series *In Community, Strength: Changing Our Minds about U.S. Adult Foundational Education* < *https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/CO%20Book%202%20Jurmo%20FINAL%2010-28-23.pdf?ver=1729788056412* > *).*

Action #2

Create a Vision and a Plan

November 13, 2024

Action #1 outlined a process that AFE planners and advocates might adapt to clarify

- who key AFE stakeholders are, including:
    - active and potential adult learners;
    - other community stakeholders who have or might have a "stake" in (a) learning how to work with basic-skills-challenged individuals and/or (b) supporting efforts to strengthen the skills, knowledge, and other assets of adult community members who have various kinds of basic skills limitations;
    - active and potential providers of financial and in-kind resources for AFE;
    - AFE service providers.
- their potential interests and roles in AFE;
- factors that might support or inhibit their involvement in AFE.

AFE planners can use such information to create a plan for an AFE systems improvement initiative. The improved system would respond to stakeholder interests and strengths while recognizing and dealing with the limitations (obstacles) they face. The initiative's goal would be to build more effective AFE systems that better serve more individuals and other community stakeholders. Shown below are steps that community stakeholders might take to develop a vision of an improved AFE system and a plan for an AFE systems improvement initiative that is relevant to the needs and resources identified in the community AFE needs assessment.

Step 1: Create a vision to guide an AFE systems improvement initiative.

Before preparing a plan, it is important for the Task Force to create a vision to guide the plan and subsequent actions. Such a vision might be viewed as akin to the Preamble to the Declaration of Independence (https://www.archives.gov/founding-docs/declaration-transcript) which was designed to inspire and unite Americans to envision a better life and fight for independence from a tyrannical colonial overlord.

This new vision statement might draw on similar mission statements that Task Force members already abide by or are aware of. Developing a vision statement for a new AFE systems improvement effort would likely take some time and effort and would require positive, careful facilitation (to avoid degenerating into confusion, conflict, or nit-picking). In addition to generating a plan, such a process (possibly with the help of an outside

facilitator) could be a good way to reinforce trust and mutual support among Task Force members, which they can build on as they move forward.

Members should consider the resulting vision statement as a "work in progress" that can be revised over time to reflect new ideas and information that emerge as the Task Force proceeds. The statement would draw on both what emerged from its assessment of the strengths and limitations of current AFE in the community and other experience and study that Task Force members have had.

Outlined below is a summary of a draft vision statement for a community-oriented AFE systems reform effort that is presented in more detail in Book 3 of the *In Community, Strength: Changing Our Minds about U.S. Adult Foundational Education* five-volume series (https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/CO%20Book%203%20Jurmo%20FINAL%2010-28-23.pdf?ver=1729788056412).

A Sample Vision Statement for a Community AFE Improvement Initiative

Key components of the proposed AFE improvement initiative would include:

- Purposes: empowerment of learners, community stakeholders, and AFE itself.
- Partners: adult learners and the diverse social communities they participate in (e.g., their families, neighborhoods, workplaces, and labor unions; healthcare, criminal justice, and other service providers; democratic institutions).
- Practices: use of AFE professionals who understand the learners and communities to be served; involve other relevant stakeholders; use effective practices for instruction and program management; continuously monitor and improve services; and invest adequate, timely, and sustained financial and in-kind supports.
- Principles: respect, resourcefulness, resilience, reason, relevance and responsiveness; constructive collaboration; commitment to high quality, honor, honesty, and humility.

Space here doesn't allow us to go into detail about how to develop the above vision or the related plan described below. But readers are encouraged to read relevant sections of Book 4 (https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/CO%20Book%204%20Jurmo%20FINAL%2010-28-23.pdf?ver=1729788056412) and Book 5 (https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/CO%20Book%205%20Jurmo%20FINAL%2010-28-23.pdf?ver=1729788056412) of the *In Community, Strength: Changing Our Minds about U.S. Adult Foundational Education* series. These documents and those presented

at the end of this document under "Resources for Other Ideas" provide models that might be adapted by AFE planners and advocates at various levels of the field.

Step 2: Develop a plan for an AFE systems improvement initiative.

To return to our example of the Community AFE Planning Task Force: Suppose that its community assessment identified the following information about the stakeholders, interests, needs, and resources that an AFE systems improvement effort might respond to in the short and longer terms:

- Significant numbers of current and potential adult learners have interests in:
    - employment in particular locally-available jobs (e.g., in eldercare, childcare, hospitality, healthcare, transportation/logistics/distribution, small business management);
    - helping their children succeed in school and in life more generally;
    - ensuring the health of themselves and their families;
    - managing personal and family financial and in-kind resources;
    - integrating positively with their neighbors;
    - dealing with legal issues (e.g., related to citizenship, criminal records);
    - moving into technical training and community college programs.

  But, for those learners to get involved in AFE that responds to those interests, they might have to deal with practical realities like busy work and family schedules, lack of transportation and digital equipment, and psycho-social obstacles (e.g., limited self-confidence and social supports) if they are to enroll, persist, and succeed in an AFE effort.

- Particular community stakeholders might be willing and able to work with AFE providers to respond to the above adult learner interests. These stakeholders could include public libraries, employers, labor unions, small business associations, healthcare providers, K-12 parent education programs, financial literacy organizations, digital access organizations, housing agencies, legal service providers, and environmental organizations. But these stakeholders will need to understand how they can best work with AFE and then allocate the staff, budgets, and other practical supports needed to create meaningful, effective partnerships.

- Some providers of funding and in-kind supports might provide resources that existing and new AFE projects can tap into. (Examples include government agencies, foundations, or individuals that provide funding or in-kind supports for projects related to community health, digital literacy and access, prisoner re-entry, youth leadership, environmental sustainability, or refugee services.) But they – like the "particular community stakeholders" described above -- will need to determine

how they can best provide meaningful, effective supports to AFE efforts. They can then allocate the staff, budgets, and other practical supports needed to create meaningful, effective partnerships.

- <u>Various AFE providers</u> might be willing and able (with staff, facilities, curricula) to take on one or more new special projects in collaboration with the above learners, community stakeholders, and supporters. But the AFE providers will need to build their own internal capacities (through hiring, training, and equipping staff; developing policies and procedures for managing projects) required to do the specialized work of projects customized to particular learner and community interests.

The Task Force might use the above information to identify a reasonable number of special projects to pilot in an initial stage of an AFE improvement initiative. To identify which projects to begin with, Task Force members should decide which learners and community stakeholder they might work with initially, the particular learner and stakeholder interests to focus on, and which available financial and in-kind resources to rely on.

Space here does not permit us to go into all the details of developing a project plan and funding proposal. (See the "Resources for Further Ideas" section below for planning models that might be adapted for this purpose.)   However, here are a few ideas that planners might keep in mind as they prepare their plans:

- <u>Develop both short-term and longer-term plans</u>. Consider doing a modest number of pilot projects first, to develop models of innovative AFE partnerships that might be learned from and built on, while raising local awareness of and interest in such models.

- <u>In an initial phase, focus on learners, partners, and supporters who you are familiar with and have leaders who are likely to be actively ready, willing, and able to be part of a new effort</u> to create innovative forms of AFE.

- <u>Start small</u>: Don't try to do too much too soon.

- <u>Learn from experience</u> as the pilots unfold, continually monitoring them and improving them, while documenting what you achieve and learn. (See these pilots as "clinical trials" of new ways of doing AFE.) This will help you to develop your capacities and then inform other learners, community stakeholders, and supporters about why and how they might get involved in similar AFE systems improvement projects.

- Give the pilots enough time to get organized, get started, operate, and demonstrate what such projects can achieve and what they need to succeed.

- As the pilots unfold, consider how you can use the ideas and tools they develop in other similar pilots, with other learners, stakeholder partners, and funding sources. The initial and later projects should be seen as a way of building an AFE "system of systems" that *systematically* use effective instructional and administrative practices to serve multiple local social-technical "communities" (i.e., workplaces and unions in various industries, correctional facilities, immigrant service agencies, healthcare institutions, women's organizations, youth programs) in which various types of adult learners live and work.

Resources for Further Ideas

Community-oriented and participatory AFE

- *In Community, Strength: Changing Our Minds about U.S. Adult Foundational Education*: https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Community-Oriented%20AFE%201-pager%2011-2-23.pdf?ver=1729788056412
- *Focus on Basics* (magazine of World Education and the National Center for the Study of Adult Learning and Literacy): https://www.ncsall.net/index.html@id=31.html
- *Learners as Leaders for Stronger Communities: Renewing Participatory Learning, Learner Leadership, and U.S. Adult Foundational Education:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Learners%20as%20Leaders%20final%20-Jurmo%203-27-23.pdf?ver=1729788056472

Examples of community AFE planning

- Boston, MA: https://www.boston.gov/departments/workforce-development/adult-literacy-initiative
- Central Alabama: https://literacy-council.org
- Chicago, IL: https://www.scalelit.org
- Cleveland, OH: https://literacycooperative.org/publications/white-papers/
- Houston,TX: https://www.houstontx.gov/adultliteracyblueprint/HoustonsAdultLiteracyBlueprint.pdf
- Muskegon, MI: https://www.readmuskegon.org

- Nashville, TN: https://www.goalcollective.org
- Roanoke, VA: https://www.blueridgeliteracy.org
- San Diego, CA: https://www.literacysandiego.org
- Union County, NJ: https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/WIB%20White%20Paper%203-08.pdf?ver=1729788056359

Collaborative approaches to working with:

- a community adult literacy coalition
  - *Resource Kit from the Literacy Powerline and ProLiteracy Community Literacy Workshop Series*: https://drive.google.com/file/d/1W2LPghXw7BRDZkWtNLAmOXEimiViL6Vg/view
- intergenerational literacy organizations
  - *Future Design for Equitable Communities: Building Family Learning Systems*: https://familieslearning.org/wp-content/uploads/2024/01/FLC–60x30–Family-Learning-Brief_Jan2023.pdf
- organizations supporting social justice, democracy, and economic security:
  - NY City Literacy and Justice Initiative: https://www.lacnyc.org/advocacy.html
  - *A Different Way: Reorienting Adult Education Toward Democracy and Social Justice:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ProLiteracy%20White%20Paper%20-%20ADifferentWay%20by%20Jur.pdf?ver=1729788056746
  - *Civic Participation and Community Action Sourcebook: A Resource for Adult Educators:* https://eric.ed.gov/?id=ED442307
  - *Basic Skills for Economic Security: How Adult Educators, Adult Learners, and Anti-Poverty Organizations Can Work Together*: https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Anti-Poverty%20Partnerships%20FINAL%2011-5-19.pdf?ver=1729788056878
- employers (to provide workplace basic skills supports to employees)
  - *Collaborative Workplace Development: An Overview:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Collab%20Workplace%20Dev%201994.pdf?ver=1729788056735
  - *Collaborative Needs Assessment: A Handbook for Workplace Development Planners:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Collab%20Needs%20Assessment%201994.pdf?ver=1729788056737

- o *What Forward-Thinking Employers Can Do to Strengthen the Basic Skills of Our Workforce:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Employer%20Can%20Do%205-28-19.pdf?ver=1729788055961
  - o *Hidden Treasures: Two Decades of Workplace Basic Skills Efforts in the United States:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Jurmo%20COABE%20Spring%202020.pdf?ver=1729788056850
  - o *State Level Policy for Workplace Education: What Advocates Are Saying:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/State%20Policy%20for%20Workplace%20Ed%201997.pdf?ver=1729788056527
  - o *Workplace Education: Voices from the Field:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Voices%20from%20Field%201991.pdf?ver=1729788056010
- labor unions
  - o *What Labor Educators Can Do to Strengthen the Basic Skills of Our Workforce:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Union%20Can%20Do%2010-1-19.pdf?ver=1729788055941
- workforce development agencies
  - o *Helping Job Seekers Who Have Limited Basic Skills: A Guide for Workforce Development Professionals:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Job%20Seekers.pdf?ver=1729788056436
- supporters of public health
  - o *Strengthening Public Health and the Healthcare Workforce: What U.S. Health Partners and Adult Basic Skills Programs Can Do Together:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Health%20Partners%20Can-Do%20Guide%209-30-19.pdf?ver=1729788056957
- supporters of environmental sustainability
  - o *Greening U.S. Adult Basic Skills Efforts: What Eco-Partners and Adult Educators Can Do Together:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Eco-Partners%20Can-Do%20Guide%209-30-19.pdf?ver=1729788056900
- correctional and prisoner re-entry agencies

- - *What Re-Entry Services Can Do to Strengthen the Basic Skills of Former Inmates:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Re-Entry%20Services%20Can-Do%2012-10-18.pdf?ver=1729788055919
- universities
  - *What Universities Can Do to Strengthen Adult Basic Skills Efforts:* https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Universities%20Can-Do%20Guide%201-10-19.pdf?ver=1729788055892

Communicating with private-sector funders

- *Trends in Private-Sector and United Way Funding: Implications for Adult Literacy Programs:* https://www.proliteracy.org/resources/trends-in-private-sector-and-united-way-funding-implications-for-adult-literacy-programs/

Collaborative planning of community-development projects

- *Using Participatory Analysis for Community Action Idea Book*: https://files.peacecorps.gov/library/M0086.pdf (This book was developed by Peace Corps for its Volunteers to use in planning of community development projects in developing countries. While the context is different than the U.S., the collaborative planning process described might be adapted by planners of AFE programs in U.S. communities.)

Action #3

Develop New AFE System Models through Pilot Projects

November 22, 2024

Pilot projects can be an effective way to develop and field-test new forms of adult foundational education (AFE) that can then be incorporated into improved AFE systems. Action #2 proposed that planners (in this case a hypothetical "Community AFE Planning Task Force") develop a vision and plan for a series of pilot projects that would lay a foundation for a longer-term AFE systems reform initiative. The pilot projects would involve AFE providers and possibly other stakeholders in creating and field-testing:

- Integrated service models: strategies and tools for helping adult learners participate more effectively as workers, family members, and/or members of various other "communities" (social contexts like neighborhoods, civic groups, etc.) they are part of;
- Partnership models: strategies and tools that AFE providers can use to effectively collaborate in various ways with other community stakeholders in the pilot projects and possible beyond;
- Resource-generation models: strategies and tools that AFE providers and stakeholder partners can use to generate financial and in-kind supports they need for both the pilot projects and beyond.
- Professional development models: strategies and tools that AFE providers and other stakeholder partners can use to build their capacities (through high-quality training and mentoring, creation of well-equipped service facilities, and creation of career opportunities for those doing this demanding work) to provide the above-described integrated services.

Outlined below is a multi-step process that the hypothetical Community AFE Planning Task Force might take to develop and field-test a small number of pilot projects that develop service, partnership, resource-generation, and professional development models relevant to selected learners, community stakeholders, and AFE providers. Such a local-level process might be also adapted within various "slices" (specialty areas like family, workforce, or correctional AFE) and levels of the AFE field.

In this hypothetical case, the Community AFE Planning Task Force (aka "Task Force") is composed of leaders and staff from:

- key AFE service providers: the county community college's adult basic education program and the local library-based volunteer literacy program affiliated with ProLiteracy;
- the county's human services, workforce development, and economic development offices;
- government and non-profit agencies that provide services relevant to inmates and former inmates, immigrants and refugees, out-of-school youth, public health, and environmental sustainability.

While the Task Force formally has the above representatives on it, not all of the representatives attend all the meetings and carry out all of its tasks. Much of the everyday work of the Task Force (e.g., planning, hosting, facilitating, documenting meetings; preparing of planning and fund-raising documents) is carried out by a small number of individuals, especially the representatives of the AFE service providers. Other Task Force members might serve more as advisors and as liaisons to sources of financial and in-kind supports.

Step 1: Identify possible pilot projects.

Let's say that, when the Task Force conducted the community assessment described under Action #1 and in Step 2 of Action #2, it identified the following needs, learner populations, stakeholder partners, and resources that it might focus on in an initial round of pilot projects. In selecting these as potential projects, Task Force members considered their relevance and importance to the community, availability of financial and in-kind resources and partners, readiness and availability of AFE provider staff to take these projects on, and timelines of the funders and partners involved (i.e., do some projects have to get started soon or could they wait a while?) The Task Force identified the following as potential projects to start with:

- Option 1: A home-health-aide job readiness program tied to the growing number of jobs in that industry:
  - Purposes
    - Help interested learners prepare for job opportunities in a growing industry by building relevant English language and other basic skills (e.g., digital skills, research skills) and background knowledge (about how to attain and perform an eldercare-related job). Learners would also develop skills and knowledge to use to care for elders and others with disabilities within their own families.
    - Help interested stakeholders (employers in the eldercare field) hire and support the growth of motivated, skilled employees.

- Help an interested AFE provider develop tools (e.g., program models, curricula, well-equipped staff…) and partnerships that can be learned from and built on by the AFE provider and other AFE providers and stakeholder partners.
  - Potential learners: Limited-English-proficient women who are interested in working as home health aides (or possibly as aides in nursing homes) and are, for cultural reasons, already familiar with "the basics" of caring for older people in their homes.
  - Potential stakeholder partners: Local home health aide companies (and nursing homes) that are motivated to find reliable, job-ready employees for the rewarding but demanding job of home health aide (or possibly nursing home nurse's aide).
  - Potential sources of financial and/or in-kind supports:
    - The above home healthcare and nursing home employers are willing to give input into the curriculum, serve as guest speakers, provide on-site tours for learners to local healthcare facilities, and consider the job applications of learners.
    - Representatives of local immigrant and refugee communities and the county workforce development center are willing to publicize and recruit candidates for the program.
    - The community college is willing to provide the program with access to its computer-equipped training center located in a new campus building in the heart of the county's largest city. The college and volunteer literacy program had instructors and other staff willing and able to help run the project.
    - A national foundation representing the healthcare industry is willing to provide a small grant to support a pilot project which can not only serve this particular community but also produce program models and tools (e.g., curricula) that other similar efforts around the U.S. can learn from.

- Option 2: A job-readiness program and community-re-integration program for recently-released inmates
  - Purposes
    - Help interested former inmates prepare for job opportunities and positive community integration while avoiding re-engagement with negative behaviors and re-incarceration.
    - Help interested stakeholders (in corrections and public safety agencies, community groups concerned about the well-being of formerly incarcerated people and their families) support the growth of formerly incarcerated individuals.

- Help this AFE provider develop tools (e.g., models, curricula, well-equipped staff) and partnerships that can be learned from and built on by the AFE provider and other AFE providers and stakeholder partners.
    - o Potential learners: Former inmates recently released from state correctional facilities. They are required to visit a local "Reporting Center" each day for counseling and drug testing. There they get counseling, drug-testing, and other supports designed to help them successfully transition to life (and jobs) outside prison. Many of these individuals lack basic literacy and computer skills; high school certificates; an effective plan for moving forward with their lives; and other assets they need to find, interview for, travel to and from, and perform jobs and otherwise move into a healthy, productive, rewarding life after prison. Many also lack financial literacy skills; have physical, mental, and/or emotional health problems; lack transportation; lack suitable clothing; lack reliable, decent housing (as landlords and family members are often hesitant to give them a place to live); and are unfamiliar with the legal, healthcare, transportation, housing, and other systems that they might need.
    - o Potential stakeholder partners: A Reporting Center, parole officers, and an informal network of faith-based institutions who want to support formerly-incarcerated individuals.
    - o Potential sources of financial and/or in-kind supports
        - The stated-funded multi-service Reporting Center for recently-released inmates is willing to provide classroom space in its facility in the heart of the county's largest city.
        - The college is willing to equip that space with used furniture and refurbished computers previously used in other college classrooms. The college and volunteer program have instructors and other staff willing and able to help run the project.
        - Local faith-based and other non-governmental institutions are willing to help program participants with clothing, food, counseling, shelter, mentoring, or other needs.
        - Parole officers are willing to give technical guidance on parole-related issues.
        - A national foundation is willing to provide a two-year grant to support a pilot project which can not only serve this particular community but also produce program models and tools (e.g., curricula) that other similar efforts around the U.S. can learn from.

- Option 3: A test-preparation programs for union members
    - o Purposes

- - Help interested union members prepare for (a) job opportunities and possible ongoing education in the growing public transit industry that offers family-sustaining employment and (b) participation in a supportive labor union
    - Help interested stakeholders fulfill their own goals including:
      - Public transit agency is able to hire motivated, skilled employees.
      - Labor union is able to serve and sustain its membership while developing expertise in a specialty area (i.e., test preparation) of worker education.
    - Help this AFE provider develop tools (e.g., models, curricula, well-equipped staff) and partnerships that can be learned from and built on by the AFE provider and other AFE providers and stakeholder partners.
  - Potential learners: Members of a transportation workers union local who want to strengthen the particular technical reading and test-taking skills they need to succeed on civil service tests required for promotion to new jobs.
  - Potential stakeholder partners: Potential partners are (a) the newly-created education department of the transportation workers union and (b) the urban transportation authority (which employs the union's workers to serve as operators, repair personnel, and other roles in the city's bus, streetcar, and subway system).
  - Potential sources of financial and/or in-kind supports:
    - Staff of the transportation workers union's new education department can advise adult education specialists from the community college about the backgrounds and strengths of the union members who might enroll in a test-prep program and on the possible content (which is kept secret by the civil service) and requirements of the civil service exams. The union can also provide classroom facilities where test-prep classes can be held, and also use its internal communications networks to recruit students.
    - The urban transportation authority provides funding for this program under the terms of the contract it had signed with the union two years earlier.
    - The community college has instructors and other staff (e.g., curriculum developers, teacher trainers, administrative staff) willing and able to help run the project.

- Option 4: An environmental education initiative
  - Purposes

- Help interested AFE learners (in ESOL, basic literacy, high school equivalency, and workforce education programs) (a) better manage environmental issues in their lives and communities and (b) qualify for "green job" opportunities.
- Help interested stakeholders achieve their own goals including:
  - Supporters of environmental sustainability (aka "ecopartners") are better able to facilitate the use of environment-sustaining practices in the community while learning how to work with AFE programs and AFE learners.
  - Employers who offer various kinds of "green jobs" have access to job candidates with relevant knowledge and skills.
- Help this AFE provider develop tools (e.g., models, curricula, well-equipped staff) and partnerships that can be learned from and built on by the AFE provider and other AFE providers and stakeholder partners.

- Potential learners: Participants in adult foundational education (e.g., basic literacy, English for Speakers of Other Languages, high school equivalency prep programs, workforce readiness programs) who might be interested in improving how they deal with environmental issues in their work, family, and civic roles. This could include learning about "green jobs" and whether and how they might pursue them.
- Potential stakeholder partners: Local "eco-partner" organizations that in various ways support environmental sustainability (e.g., via community gardens; recycling programs; tree planting and other efforts to create green spaces; sale of environmentally sustaining products; green job training in HVAC, waste management, solar technology, weatherization, mass transit repair and operation, construction) and would be interested in working with an AFE initiative that helps adult learners support environmental sustainability in various aspects of their lives.
- Potential sources of financial and/or in-kind supports
  - The above "eco-partners" (organizations that support environmental sustainability in various ways) might be willing to give input into the curriculum, serve as guest speakers, provide on-site tours for learners to local environmental projects and facilities, and consider and relay the job applications of learners interested in environment-related jobs. Those eco-partners might also help AFE programs to publicize environment-oriented AFE services, recruit learners, and prepare funding applications.
  - The community college is willing to provide the program with access to its computer-equipped training center located in a new campus building in the heart of the county's largest city. The college might

also host tours of various parts of the campus where energy conservation, waste reduction, water conservation, and other environment-related practices are underway. The college also has instructors in AFE and environment-related subjects and other staff willing and able to help run the project.

- A government funder is interested in supporting green-job-related training for low-income individuals.
- A national green-job network might be able to provide technical assistance and suggestions for funding sources.

- Option 5: A financial literacy initiative
  - Purposes
    - Help interested AFE learners (in ESOL, basic literacy, high school equivalency, and workforce education programs) better manage financial issues and practices (e.g., dealing with income and benefits, insurance, budgets, record-keeping, purchases, loans, credit ratings, credit cards, savings, operating a small business, expenses related to housing, transportation, healthcare, food, schooling, etc.) in their family, work, and civic lives.
    - Help interested stakeholders achieve their own goals:
      - Supporters of economic security for low-income individuals are able to support the use of good financial practices by community members while learning how to work with AFE programs and AFE learners.
      - This AFE provider develops tools (e.g., models, curricula, well-equipped staff) and partnerships that can be learned from and built on by the AFE provider and other AFE providers and stakeholder partners.
  - Potential learners: Participants in adult foundational education (e.g., basic literacy, English for Speakers of Other Languages, high school equivalency prep programs, workforce readiness programs) who might be interested in improving how they manage financial issues in the work, family, and civic roles.
  - Potential stakeholder partners: Local organizations that in various ways support economic security for lower-income families and would be interested in working with an AFE initiative that helps adult learners manage the financial and in-kind resources they use in various aspects of their lives and otherwise ensure their economic security.
  - Potential sources of financial and/or in-kind supports:
    - The above organizations that support economic security in various ways might be willing to give input into the curriculum, serve as guest

speakers, provide on-site tours for learners to local facilities, and consider the job applications of learners interested in jobs that require financial literacy. Those "financial security" partners might also help AFE programs to publicize financial-literacy-oriented AFE services, recruit learners, and prepare funding applications.

- The community college is willing to provide the program with access to its computer-equipped training center located in a new campus building in the heart of the county's largest city. The college also has instructors in AFE and banking- and business-related subjects and other staff willing and able to help run the project.

- Option 6: A professional development program for AFE providers and stakeholder partners
  - Purposes
    - Help interested AFE staff (instructors and others) and representatives of partner organizations develop their expertise for creation and operation of effective basic skills-related services customized to particular learner populations and community needs.
    - Help this AFE provider develop professional-development-related tools (models, curricula, well-equipped staff) and partnerships that can be learned from and further built on by the AFE provider and other interested stakeholders.
  - Potential participants: Current and potential staff of AFE and of other potential partners (like those listed for the other projects above) who want to develop the expertise they need as instructors and managers of the above kinds of AFE projects.
  - Potential stakeholder partners: The potential partners listed for the above projects could:
    - have some of their staff participate in special professional development activities (e.g., on "how to work with individuals who have basic-skills-related limitations" or "how to work with AFE programs");
    - provide other supports to AFE projects integrated with the work of those other stakeholders.
  - Potential sources of financial and/or in-kind supports:
    - The above stakeholders might give input into a professional development curriculum, serve as guest speakers, provide on-site tours for participants to their facilities, recruit participants for the program, provide space for learning activities, donate equipment, and help to raise funding for the program.

- The community college is willing to provide the program with access to its computer-equipped training center located in a new campus building in the heart of the county's largest city. The college has instructors and other staff willing and able to help run the project.
- A national foundation and the state's AFE Resource Center are interested in learning from and possibly supporting (with small grants) a pilot project which (a) builds collaboration between AFE programs and other stakeholders; (b) builds particular expertise of the staff involved in such collaborations; and (c) produces program models and tools (e.g., curricula) that other similar efforts to build local-level AFE systems around the U.S. can learn from.

Step 2: Select and prepare for an initial round of pilot projects.

It is likely not feasible nor desirable to try to implement all of the above projects at the same time. Using the previously-described criteria (of relevance and importance to the community, availability of financial and in-kind resources and partners, readiness and availability of AFE provider staff to take these projects on, and timelines of the funders and partners involved), decide which projects should come first and begin preparing for them accordingly. View these initial projects as not only ways to serve particular learners and community stakeholders but also as opportunities to develop the expertise and other resources (e.g., curricula, learning facilities, partnerships with various stakeholder groups, connections with funders) of the AFE providers and other partners involved.

Given that those AFE providers and other stakeholders might have had little or no prior experience conducting such collaborative projects, it would probably be wise to start with "a professional development program for AFE providers and stakeholder partners." Such a joint training program might:

- Build the expertise of the AFE providers and other relevant stakeholder partners that they will need to do the specialized work of the initial projects and similar projects that might come later. Such projects will require planning, implementing, monitoring, and continuous improvement of AFE services customized to particular learners and communities, with the staff and material resources available.
- Build understanding and trust among the AFE providers and other partners they'll work with.
- Provide a venue for initial planning of each project and development of curricula, assessments, and other tools that might be shared across projects over time. Such collaboration can enhance the efficiency of the projects as individual projects and as parts of a new, multi-purpose community AFE system.

In addition to starting with this professional development project, a small number of additional projects might also be selected for the first round of activities. In this case, let's assume that funding for two of the projects (i.e., the eldercare and prisoner re-entry projects) is already available and the funders now want you to get the projects moving so they produce reportable results within a year. (Assume that the other projects – test-prep for union members, environmental and financial literacy education – can be put on hold for six months until funding becomes available.)

The Task Force can now identify who will carry out the professional development program (i.e., staff of the community college's AFE department and of the volunteer literacy program, possibly with help from subject matter experts from the other stakeholder partners). Depending on the specific content of the training, the trainers might also bring in professional development specialists (in ESOL or correctional education, for example) from other AFE programs or a state or national AFE resource center. The training team can then:

- Clarify the particular roles to be played in the re-entry and eldercare projects by AFE instructional and administrative staff and representatives of other relevant partners.
- Clarify the particular expertise and other tools (e.g., curricula, computer-equipped classrooms) those instructional and administrative staff will need to perform those roles.
- Ask the AFE and other partner representatives who will be participating in the professional development program to assess what they already know and can do related to the roles they will play in the projects and what their gaps are.
- Develop an engaging, relevant training program that helps the participating AFE staff and representatives of other partner stakeholders to expand on the expertise they already have to:
  o Understand the "big picture" of what the two projects will try to accomplish and how they will be used to inform and shape a new, multi-purpose, collaborative AFE system to serve local communities.
  o Build more-specific expertise (e.g., teaching skills, knowledge about the learner populations to be served, engaging curricula related to particular learning goals) they'll need to carry out their respective and joint roles.
  o Develop trust and positive working relationships among those involved.
- Put in place the administrative supports (e.g., facilities, record keeping, supplies, food) that this professional development program requires.

Once the above plan and administrative supports are ready, the training team can then implement a range of professional development activities. Some might be for the entire group and some for smaller groups of participants. Activities should give participants

opportunities to work with each other to solve problems similar to those they will likely face in their roles in the projects. In addition to face-to-face learning, participants can (a) meet remotely and/or (b) on their own do self-study activities such as reading of background materials or viewing on-line videos relevant for the projects they will be participating in. The training should build on the prior knowledge of the participants and give them encouragement and opportunities to actively share ideas and otherwise help each other learn and prepare for the launch of the projects they will be working in**.**

The professional development activities might focus in particular on creating lesson plans, curricula, and other tools that the participants will use in the projects they will be running, as well as in other similar projects that might come later. For example, because several of the projects might be teaching basic computer skills, templates of lessons on such common computer tasks as "how to send email," "how to search on-line for work-related information," or "how to create and use a spreadsheet to track financial data" might be created and then adapted for the specifics of each project. (Consider the "Teaching Skills that Matter" curriculum model [https://lincs.ed.gov/professional-development/resource-collections/profile-9203] as one that uses project-based and problem-based learning activities that can be adapted for many types of learners and learning goals.) Similarly, templates might be created for such common activities as (a) "initial assessments" that allow staff to gauge the abilities and interests of new learners and "orientation sessions" in which staff welcome learners, help them get to know each other, and review the project's objectives and "housekeeping" issues like schedules, ground rules, etc. and (b) "recruitment strategies" that staff can use to recruit learners for various programs. By building a library of such commonly used instructional and program management activities, an AFE reform effort can create a system of practices that can be continuously used, adapted, and improved in subsequent projects. By so doing, staff can avoid having to constantly start from scratch and can instead enhance the efficiency of their work.

For further information about planning and professional development for customized AFE projects, see the "Resources" section at the end of this document.

Step 3: Implement, monitor, and continuously improve the pilot projects.

Once project plans are in place and staff have been prepared, project staff can launch the projects and continuously monitor (through ongoing communications among staff and feedback from participants) them, making needed adjustments along the way. It would be helpful for this systems-reform initiative to have one or more evaluators assigned to the projects to organize such monitoring and inform continuous improvement activities. The evaluator(s) can also prepare final reports that summarize what happened, results for various stakeholders, and recommendations for how such projects might be improved in the future.

Step 4: Use lessons learn to decide next steps for ongoing AFE systems reform.

While the initial projects are underway and after they are finished, the Task Force should review the key information contained in the project evaluation reports and decide possible next steps, which could include:

- A second round of the first round of projects (i.e., the professional development course, the eldercare project, and the prisoner re-entry project).

- Additional new projects like those previously identified (e.g., test-preparation for union members, environmental education, and financial literacy education) and/or possibly others that have emerged more recently.

- Sharing lessons learned in the initial projects with various audiences including local AFE providers, other AFE providers in other communities, current and potential funders of AFE, other stakeholder groups who might be interested in getting involved in the next round of projects or in the future, and the general public and the particular communities that current and potential learners come from.

- Advocacy for additional resources for similar projects and for the concept of AFE systems reform.

In sum . . .

In Action #3, the Community AFE Planning Task Force has planned, implemented, continuously improved, and learned from a modest number of pilot projects. Those projects field-tested some new strategies and tools that AFE providers and stakeholder partners might adapt to create local-level AFE systems that better serve more individuals and community stakeholders. But such pilot projects and systems reform efforts require financial and in-kind supports.

Action #4 (to follow) will discuss the supports that systems reform efforts need, possible sources of those supports, and how those sources might proactively get involved in AFE systems reform.

RESOURCES

Project planning

- "Reinventing a Basic Literacy Program": https://eric.ed.gov/?q=sourcex%3a%22Adult+Literacy+Education%22&id=EJ142929 69

- "Planning an Adult Literacy Program": https://ctb.ku.edu/en/table-of-contents/implement/improving-services/plan-adult-literacy-program/main
- "Establishing an Adult Literacy Program": https://ctb.ku.edu/en/table-of-contents/implement/improving-services/establish-adult-literacy-program/main
- "Adult Learning Planning Framework": https://www.proliteracy.org/resources/contextualizing-adult-education-learning-from-six-decades-of-experience-and-research/
- "Collaborative Learning for Continuous Improvement: Team Learning and Problem Solving in a Workplace Education Program": https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Collab%20Learning%20Guide%20Jurmo%201998.pdf?ver=1729788056442
- "Collaborative Needs Assessment: A Handbook for Workplace Development Planners": https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Collab%20Needs%20Assessment%201994.pdf?ver=1729788056737

Professional development

- *Focus on Basics* issue on "Staff Development": https://www.ncsall.net/fileadmin/resources/fob/2002/fob_5d.pdf
- "Invitations to Inquiry: Rethinking Staff Development in Adult Literacy Education" by Susan Lytle, Alisa Belzer, and Rebecca Reumann
- "Using Universal Design for Learning to Design Self-Paced Professional Development Modules for Adult Education Instructors": https://www.proliteracy.org/resources/using-universal-design-for-learning-to-design-self-paced-professional-development-modules-for-adult-education-instructors/
- "ProLiteracy Management and Leadership Training" video: https://www.proliteracy.org/resources/proliteracy-management-and-leadership-training/
- "Teacher Training Plus – English Language Learning" video: https://www.proliteracy.org/resources/teacher-training-plus-english-language-learning/
- "How Teachers Change: A Study of Professional Development in Adult Education": https://www.ncsall.net/fileadmin/resources/research/report25.pdf
- "The Characteristics and Concerns of Adult Basic Education Teachers": https://www.ncsall.net/fileadmin/resources/research/report26.pdf

Project-based and problem-based learning

- "Teaching the Skills that Matter (TSTM)": https://lincs.ed.gov/professional-development/resource-collections/profile-9203
- *Focus on Basics* issue on "Project-Based Learning": https://www.ncsall.net/index.html@id=160.html
- "Problem Solving: A Tool for Workplace Educators": https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/NYSED%20Note%206%20_Problem%20Solving_%201995%20Jurmo.pdf?ver=1729788056442
- "Contextualizing Adult Education: Learning from Six Decades of Experience and Research": https://www.proliteracy.org/resources/contextualizing-adult-education-learning-from-six-decades-of-experience-and-research/

AFE projects related to . . .

- Prisoner re-entry
    - LINCS Correctional and Reentry Collection: https://lincs.ed.gov/resource-collection?keys=&field_topic_target_id%5B7537%5D=7537
    - "What Re-Entry Services Can Do to Strengthen the Basic Skills of Former Inmates": https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Re-Entry%20Services%20Can-Do%2012-10-18.pdf?ver=1729788055919
- Eldercare workers
    - "Eldercare Careers Project at Union County College": https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Eldercare%20Final%20Report%20UCC%2012-6-09.pdf?ver=1729788056235
- Test-preparation for transit union members
    - "Trains, Buses, and Basic Skills: Learning in – and from – a Union Education Program for Transit Workers": https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Labor%20Studies%20Journal%20-%20Jurmo%20March%202021.pdf?ver=1729788056771
- Partnerships with supporters of environmental sustainability
    - "Greening U.S. Adult Basic Skills Efforts: What Eco-Partners and Adult Educators Can Do Together": https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/ODC%20Eco-Partners%20Can-Do%20Guide%209-30-19.pdf?ver=1729788056900
- Work-related basic skills

- o "Adult Education and the Workforce Development System: Partnering to Improve Services": https://lincs.ed.gov/professional-development/resource-collections/profile-9523
- o "Hidden Treasures: Two Decades of Workplace Basic Skills Efforts in the United States": https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/Jurmo%20COABE%20Spring%202020.pdf?ver=1729788056850

Action #4

Secure Supports and Supporters for AFE Systems Reform

December 2, 2024

Actions #1, #2, and #3 laid out the foundation for pilot projects in which AFE partnerships can field-test new forms of adult foundational education (AFE) that can then inform and be incorporated into improved AFE systems. Those systems would be customized to the interests, needs, and strengths of the particular communities (i.e., both geographic communities and particular social groupings within those localities) to be served. To transition to such community-oriented systems, AFE providers and their community partners will require various kinds of supports. Those supports could:

- Take the form of financial, in-kind, and/or policy supports;
- Come from governmental (public) and/or non-governmental (private) sources;
- Be used for basic operating costs and/or the kinds of pilot projects described under Action #3;
- Tap into existing funding streams and/or require the creation of new pools of funding or the re-kindling of former funding sources.

Action# 4 below will describe:

- How financial, in-kind, and policy supports might be used to facilitate AFE systems reform initiatives;
- Potential sources of those supports;
- What potential supporters can do to generate and target resources for AFE systems reform initiatives.

This discussion intentionally goes significantly beyond the "policy and funding" discussions commonly found in the AFE field. Those discussions typically focus on "How can we preserve and possibly expand our current funding for the AFE models we now use?" While such an approach to advocacy is understandable and in itself useful, it doesn't acknowledge the need for significant strengthening and expansion of AFE services in the ways described in Actions #1, #2, and #3. Nor does it show policy makers, funders, and other potential partners how customized, well-supported AFE systems can better serve a wider range of learner and community interests. Put another way, if all we

do is ask for a bit more money to keep our current efforts alive, that's all we are likely to get. We will then continue to serve small numbers of learners, focus on a limited number of learner and community needs, and do it on a shoestring with an under-equipped, revolving-door AFE workforce.

In this Action #4, we will focus on the state, national, and local levels rather than solely on the local level (as we had done in Actions #1, #2, and #3 in which we talked about a hypothetical Community AFE Planning Task Force).

This Action #4 draws directly from "What We Can Do to Generate Supports and Supporters for Community-Oriented AFE" (Book 5 of the *In Community Strength: Changing Our Minds about U.S. Adult Foundational Education* series: https://img1.wsimg.com/blobby/go/4b259097-f77f-4c70-813c-4cff11dc6161/downloads/CO%20Book%205%20Jurmo%20FINAL%2010-28-23.pdf?ver=1729788056412). Action #4 also presents new ideas – and reflects new realities -- that have emerged in our field and nation since the issuing of the *In Community, Strength* series in November 2023.

How financial, in-kind, and policy supports could be used to support AFE systems reform initiatives at the state level

- Basic funding: AFE systems reform efforts at all levels require basic funding to cover such operating costs as professional staff, facilities, equipment, transportation, professional development, public outreach, partnership development, research and evaluation, and other essential program components. Funding for these essentials needs to be adequate, timely, sustained, and easy to access and manage. In the case of a state-level systems reform initiative, it would likely need to be led and managed by a special institution based in a state agency and/or in other institutions like one or more universities that can perform various roles. (Learn about state literacy resource centers [Siedow, October 1996; Chlup & Tomaszewski, Spring 2008] and the national-level National Institute for Literacy [Stein, 2000] and National Center for the Study of Adult Learning and Literacy [October 2002]).

- Special funding should be provided to support pilot (demonstration) projects (to develop new program models for particular learners, stakeholders, needs, etc.) and rapid-response projects (e.g., to respond to sudden availability of new funding, to the need for workers in a particular industry, to a public health problem like COVID-19, or to a sudden influx of refugees from a particular region). (See the demonstration project models developed by the National Institute for Literacy [Stein 2000] and the National Workplace Literacy Program [Evaluation Research, November 1992] and how the AFE field responded to COVID-19 [Belzer et al, 2022] and the attacks of September 11, 2001 [Jurmo, Fall 2002].)

- In-kind supports can also be very useful as stand-alone contributions or in combination with funding. Examples of in-kind supports include equipment (e.g., refurbished computers for use in computer classrooms or in learners' homes); Internet accounts for learners and AFE programs; office, classroom, and meeting space; transportation (e.g., bus passes for learners); childcare for learners' children; clerical supplies; refreshments (for meetings and special events); clothing for job seekers; books for learners and their children; and publicity (e.g., through local news coverage).
- Volunteer (pro-bono) supports can take the form of individuals (including adult learners) who volunteer to help with advice on technical and other issues; instructional tasks (as tutors, teachers' aides, curriculum developers); administrative tasks (e.g., legal advice, publicity, fundraising); setting up and hosting a program website; hosting of special events; and advocacy (e.g., outreach to public officials).
- Policy supports can take these forms:
  - Governmental policies that set goals; provide guidelines, frameworks, performance measures, and funding to provide incentives for innovations.
  - Private-sector policies that provide AFE supports for particular populations and areas of need. (For example, businesses can create "clear-language" policies and procedures to ensure that company communications are user-friendly for employees and customers who have limited English skills.)

Potential sources of supports for AFE systems reform initiatives

Providers of the above kinds of supports include:

- Federal, state, county, and municipal government agencies, including traditional AFE funders and other agencies (e.g., correctional, public health, immigration, workforce development, public schools, housing) that serve individuals with foundational skills limitations. These agencies might work together in a "whole of government" approach that maximizes the impact and efficiency of such government-supported efforts.
- Private-sector stakeholders who for various reasons are or might be concerned about the adult foundational skills issue. These stakeholders might include individuals, foundations, corporate giving offices, employers and labor unions (both individual employers and unions and employer and labor associations), workforce and economic development agencies, and stakeholders concerned about public health, criminal justice reform and public safety, immigrants and refugees, individuals with disabilities, environmental sustainability, and other societal issues (Business Council for Effective Literacy, January 1989a; Chisman & Spangenberg, March 2006; Waite, March 2019).

What potential supporters can do to generate and target resources for AFE systems reform initiatives

AFE partners wanting to generate supports from the above kinds of sources might adapt lessons learned in the following examples:

Staffing (*Staffing supports needed and providers of those supports)*

Professional staff: As is true in K-12 schools, higher education, healthcare, and other human services, AFE needs professional staff who have the special expertise and supports required to provide high-quality services. (Most parents wouldn't be satisfied with the idea of sending their children to schools that don't have qualified staff. Users of AFE rightly should also expect to have qualified, adequately supported instructors and other staff to serve them.) As a field, AFE programs have historically lacked such staffing, due to lack of investment which in turn is likely due to the lack of recognition of AFE and adult learners as entities worthy of support. The creation and sustaining of the community-oriented AFE described in this series will require special expertise in planning and implementing of collaborative projects customized to diverse learners, stakeholders, and contexts.

There has also long been a need in AFE for staff who come from the communities that the field tries to serve. Though this issue periodically raises its head in the field, it remains a challenge, likely due a number of factors. These include the lack of professional salaries and career paths for adult educators in general and an AFE culture that has tended to be dominated by people who might not understand the benefits of recruiting and supporting a more diverse pool of AFE professionals nor understand how to do so (Business Council for Effective Literacy, January 1993b; Harrison, 2021; Quigley, Fall 2021).

Para-professional staff: While individuals without formal AFE credentials can play roles in AFE programs, they need to nonetheless be equipped with the appropriate expertise that their roles require. These individuals can include volunteers from the surrounding community or from a stakeholder group (e.g., employers such as a local restaurant owner, nursing home administrator, or building contractor who might mentor adult learners on jobs in those industries). Former or current adult learners might also participate as helpers in the classroom or in administrative roles. (In some cases, learners have gone on to become successful professional AFE teachers and administrators.)

These "para-professionals" might do this work on a pro-bono, unpaid basis, with a stipend or salary, or in an "AFE apprenticeship" program. College students might serve as helpers in AFE programs through service-learning courses or work-study programs offered by their universities (Business Council for Effective Literacy, April 1987b; Jurmo, March 2003; New York Times, July 21, 1987). Para-professionals, though not fully qualified professionals, should nonetheless be expected to act in a professional way, take the work seriously, understand and adhere to organizational policies, and be committed to providing high-quality services.

There is a strong tendency in AFE in the U.S. to see "volunteers" as the "solution to adult literacy" and a way to avoid having to invest in creating a professional-caliber field. Although new digital technologies have great potential to better serve more learners, the field will nonetheless continue to need well-equipped human beings – both professional and para-professional – to manage AFE services and provide personal supports to learners. (In addition to learning from the decades of experience by volunteer organizations like ProLiteracy, the field might explore Peace Corps as a model of how to use and support para-professional volunteers to carry out demanding, professional-quality work with limited resources [Office of Overseas Programming and Training, May 2018]).

<u>Professional Development</u>

Professional development supports needed: The above-described professional and para-professional staff need various kinds of professional development supports. Professional development should be understood to be more than "training;" a real profession should include paid positions with professional-level salaries and benefits (for the professional staff), appropriate compensation (possibly to include stipends, small grants, fellowships, or apprenticeships) for para-professionals, as well as professional-quality training (ranging from professional certification to degree programs), mentoring, peer networks, and easy access to high-quality resource materials. As stated above under "staffing," those doing this work should thus be recognized, supported, and be accountable as professionals (Smith et al, November 2003).

Providers of those professional development supports: The good news here is that at this writing there are already many good examples of the kinds of professional development described above. Examples include the in-person conferences and workshops, on-line courses, discussion groups, and resource collections offered by national institutions (e.g., LINCS.ed.gov, ProLiteracy, COABE) and state and local adult education professional development offices and networks. However, those wishing to build more relevant and effective AFE

systems will need more specialized, intensive professional development opportunities that focus more directly on how to create AFE services like those described earlier in this series. While many of the existing professional development supports are relevant and adaptable to a "community-oriented" model, additional training and resource materials should also be made available specifically for that purpose. (See Adult Foundational Education Digital Library Group, February 6, 2023 for more about the need for an expanded system of on-line AFE resources.)

Facilities

Facility supports needed: AFE programs need facilities to house instructional and administrative activities. These facilities need to be properly equipped with furniture, digital technologies, and other amenities; accessible in terms of time and location to learners and staff; and safe and welcoming to both staff and the learners to be served. (Two examples: If the program is serving Arabic-speaking refugees and immigrants from a predominantly-Muslim country, it might be helpful to have signage written in those learners' language and culturally-relevant foods and/or a prayer room available. A workplace AFE program might be housed in the same training rooms used for management personnel, both to provide an environment that is physically well equipped [with quiet, well-ventilated rooms with good lighting, comfortable seating, and required digital equipment] and also conveys the company's respect for the program and worker participants [Boutwell, 1989; Soifer, Irwin, & Young, 1989]). Though the AFE field is rapidly moving to a greater reliance on distance learning, many programs will still need to have physical spaces to operate in. These could include spaces in the AFE program center and in one or more satellite locations (e.g., classrooms in a public housing residence, a labor union hall, a public library, or a correctional facility).

Providers of those facility supports: As with the case of "Policies" above, such facilities might be provided by a combination of "traditional" AFE funders and other stakeholders. Those other stakeholders might include prisoner re-entry centers, employers (who provide classroom spaces on company premises), labor unions (which set up learning centers at their union halls), public libraries (which create computer-equipped classrooms where instructors from nearby AFE programs teach classes) (Spangenberg, August 1996), or corporations (which open their cafeterias up as after-hours tutoring sites for volunteer literacy programs). Stakeholders (which might include the above institutions and others like universities and community colleges, places of worship, hotels, or restaurants) might also provide space for AFE-related meetings of community members, business leaders, or AFE service providers. Spaces might also be provided for an

AFE conference or other special event (e.g., an awards ceremony for outstanding adult learners or readings by adult learners of their writings).

<u>Technologies for Teaching/Learning, Program Management,</u>
<u>and Professional Development</u>

Technology supports needed: Starting in the 1980s, the U.S. AFE field has talked about "computers" as a potentially powerful tool for teaching and learning (Business Council for Effective Literacy, July 1985; Focus on Basics, Fall 1987). Computers were also seen as something that could make assessment, data-management, reporting, internal and external communications, and other program functions much more efficient. Fast-forward to now: computers are now established as a vital tool for adult learners to use in their education and other aspects of their lives. This became especially apparent during the COVID-19 pandemic when many AFE program facilities were closed and AFE practitioners scrambled to stay in touch with learners via remote, on-line learning (Belzer et al., July 2020; Belzer et al., 2022).

This experience highlighted the potential of using on-line learning as a way to reach many more learners and provide more opportunities and hours for them to engage in learning at times and locations convenient to them (Office of Educational Technology, Summer 2022). New funding like the Digital Equity Act (Berson-Shilcock, Treschitta, & Mortiere, August 18, 2022) and the Bipartisan Infrastructure Law (National Skills Coalition, Spring 2022) has become available which might greatly expand the immediate infrastructure for, interest in, and longer-term development of on-line AFE. To ensure that these new technologies in fact help learners effectively learn what they actually need will require careful thinking, research, and development (Vanek, Harris & Belzer, June 2020). We need to avoid the tendency of our field to look for quick fixes that aren't supported by evidence of what works. This is especially the case if we want to develop community-oriented AFE which is customized to what particular learners need for specific contexts. One-size-fits-all electronic workbooks won't be very helpful and might discourage learner participation and future funding for technology-assisted learning.

Also, as stated under "Professional Development" above, staff can use on-line tools to develop expertise, support each other, and otherwise develop themselves as AFE professionals. This is evident in the recent shift to use of on-line conferences for adult educators and in the long-time use of the U.S. Department of Education's Literacy Information and Communications System (www.LINCS.ed.gov . In 2023, a group of AFE researchers also issued a concept paper that calls for the creation of an on-line Adult Foundational Education Digital Library that would expand on LINCS and other on-line resource collections to make

a wider range of resources (e.g., curricula, reports, research articles, videos, and others) available to AFE practitioners, learners, and other stakeholders (Adult Foundational Education Digital Library Group, February 6, 2023).

Providers of those technology supports: As with the case of "Policies" and "Facilities" above, the above-described technologies might be provided by a combination of "traditional" AFE funders and other stakeholders. Those other stakeholders might include technology companies, university-based educational and technology research centers, and other governmental and non-governmental stakeholders who have an interest in AFE. (For example, various industries might fund research and development for models of on-line AFE learning that are relevant to their employees.) Federal and state funding might support national demonstration projects that show how on-line and other technologies can serve particular learner populations, industries, or initiatives focusing on societal problems (e.g., providing on-line resource centers where adult learners can view videos or otherwise access information related to health needs.) Public or private (e.g., foundations) funders might also support the creation of the above-described Adult Foundational Education Digital Library to make it easier for AFE professionals to access a wider range of resources related to instructional and administrative tasks.

Partnerships

Partnership supports needed: This series has emphasized that effective "partnerships" will be key for many community-oriented AFE efforts. By partnerships we mean intentional, meaningful, and adequately-supported collaborations between AFE providers, adult learners, and other stakeholders. These collaborations would be designed to benefit all parties involved. As stated in Open Door Collective (September 30, 2019a and September 30, 2019b), collaborations can take these forms:

- Contextualized education: Partners collaborate to provide contextualized education (through various types of co-teaching) to help learners develop foundational skills and other skills and knowledge related to the non-AFE stakeholder's area of expertise. (For example, an expert in customer service for the retail industry might co-teach a job readiness course that focuses on the English, math, and other skills needed for customer service tasks in retail and other industries.)
- Career pathway preparation and placement: Partners collaborate to provide learners with job preparation related to the non-AFE stakeholder's area of expertise. For example, a local nursing facility might work with an ESOL

program to provide a training to immigrant learners interested in moving into patient-care jobs in nursing homes or home healthcare.

- <u>Non-educational supports for learners</u>: Partners provide direct services to learners that are related to the non-AFE stakeholder's area of expertise. For example, an optometrist might do visual screening for adult learners.
- <u>Helping non-AFE partner to better serve adult learners</u>: The AFE provider builds the capacities non-AFE partners to better understand and serve adults with foundational skills challenges.
- <u>Making AFE facilities more user-friendly</u>: Partners collaborate to create adult education facilities that are in keeping with the non-AFE partner's areas of expertise. For example, a healthcare provider or public safety agency might help the AFE center be more supportive of the health and safety of learners and staff who use the facility.
- <u>Service-learning opportunities</u>: Partners collaborate to provide service-learning opportunities for learners that are in keeping with the non-AFE stakeholder's areas of expertise. For example, an environmental organization might provide opportunities for adult learners to create and use a community garden or carry out a neighborhood clean-up activity.
- <u>Joint advocacy, planning, and fundraising</u>: Partners conduct joint advocacy, planning, or fundraising on behalf of services for AFE learners that are in keeping with the non-AFE stakeholder's areas of expertise. (For example, AFE programs and local healthcare providers might advocate for public or private funding of health literacy activities carried out by local AFE centers and public health partners.)
- <u>Joint research</u>: Partners collaborate to conduct research that helps learners and their communities in areas that are in keeping with the non-AFE partner's areas of expertise. (For example, a university school of public health might research the health needs of people with basic skills limitations or evaluate health activities carried out at a local AFE center.)
- <u>Joint professional development</u>: Partners provide joint professional development for staff of both AFE and the non-AFE partner organization, to help them both better understand what the other partner does and needs and how they can collaborate to better serve adult learners.

Effective partnerships need to be well-planned, carefully implemented, continuously monitored, and adequately supported. Such collaborations in turn require professionals with the expertise, time, authority, and material resources to do the work. Without such resources, collaborations are likely not to be effective or go beyond the "token" (superficial) level. Special funding will likely be required to pay for staff time and other related expenses required for collaborative work (Folinsbee & Jurmo, 1994a).

Providers of those partnership supports: Again, there is good news here. There are many existing models of partnership efforts that can be learned from and built on. For example, the National Workplace Literacy Program of the later 1980s and early 1990s funded a series of three-year demonstration projects in which partnerships of employers, labor unions, and AFE providers worked together to plan, implement, and evaluate collaborative basic skills programs for those employers' workers. The funder (U.S. Department of Education) provided guidelines for how those partners could contribute to the joint effort. Program evaluations and other reports showed how each funded project interpreted "collaboration" (Evaluation Research, November 1992). Guidebooks were also produced that laid out steps for forming and implementing such partnerships (Folinsbee & Jurmo, 1994a). Similarly, the projects documented by Auerbach (1992), Belzer et al (July 2020), Boutwell (1989), Fingeret, (1993), Merrifield, White, and Bingman (1994), Proctor and Hannah (2023), Soifer, Irwin, and Young (1989), Sperazi and Jurmo (July 1994), among others, describe processes for planning and implementing collaborative projects. The lessons from these and other collaborative AFE projects (Open Door Collective, September 30, 2019a and September 30, 2019b) can be learned from and adapted by governmental and non-governmental funders who might want to support the kinds of collaborative AFE projects proposed in this series.

Public Outreach

Outreach supports needed: AFE programs often need to engage in public outreach activities to recruit learners, build partnerships with local stakeholders, raise funds, and increase public awareness of the potential of AFE services and of the learners served. AFE programs can post information on their websites, issue press releases, invite the news media to cover program activities, hold special events (e.g., a "march for literacy," a "reading event" in which learners read from their written work), distribute flyers, and set up face-to-face meetings with public policy makers, funders, and other audiences. Planning, organizing, implementing, and following up on such outreach activities require staff who have the time, expertise, authority, and other resources to do it well. These activities also can require particular material resources (e.g., a website, meeting spaces, printing, postage). Messages need to be well informed, positive, respectful, realistic (not promising more than is possible), clear, and well delivered.

Providers of those outreach supports: As with the "Policy," "Facilities," and "Technologies" examples above, resources for public outreach might come from governmental or non-governmental sources. Some of the supports (e.g., costs of a

program website and clerical staff) might be covered under the program's usual budget. Costs of special events might be paid for by individual donors or local businesses. Local media might be looking for good human interest and other stories (related to education, immigration, correctional education) to cover and, by profiling an AFE program, effectively provide in-kind publicity support to the program.   A local university or community college might have journalism or communications students (or other students studying education, immigration, or other issues relevant to the AFE program) who might be interested in doing internships in the program. In such internships, the college students might provide technical support (e.g., to design a website, write press releases, write profiles of learners, make videos of program activities). Their work might then be woven into a package of public outreach resources for the AFE program to use.

Research and Development

Research and development supports needed: AFE programs can benefit from good research and evaluation (Alamprese, December 1988; Lytle, Belzer, & Reumann, October 1992). These might take the form of action (aka, participatory) research in which staff and/or learners investigate questions of interest to themselves and the program (Hohn, 1997; McGrail, Purdom, Schwartz, & Simmons, 1998; Merrifield, White, & Bingman, 1994). Research might also be done by outsiders who are invited in to collect information that the program, learners, other partners, or funders need. If a program wants to develop its abilities to conduct collaborative AFE projects customized to particular learner and stakeholder interests, research and evaluation might be built into the project design to collect useful information about learner needs and interests, available resources to incorporate into the project, the effectiveness of project activities, and factors that support or hinder the project's success. This is another situation in which individuals doing this work need to have the necessary time, expertise, authority, and other resources

Providers of those research and development supports: As with other supports discussed above, supports for research and development might come from governmental or non-governmental sources. AFE funders tend to recognize the importance of needs assessment and evaluation in their projects and provide at least some funding for those functions. Beyond funding that standard type of research (which often focuses on a limited range of short-term outcomes for learners), funders might establish special demonstration projects to develop more-robust, community-oriented models and put a special emphasis on research and evaluation. For example, federal and state funders (and/or private funders from healthcare organizations) might support health-related demonstration projects that provide health education and other services to various populations of adult learners

or prepare them for healthcare jobs (Bennett, Pinder, Szesniak, & Culhane, September 2008; Hohn, 1997; Jurmo, December 6, 2009) Research organizations based in universities and other institutions can conduct research or provide research-related technical assistance to AFE program staff (Open Door Collective, January 10, 2019). Good documentation, analysis, use (for formative evaluation and for planning of future projects) and dissemination of lessons learned in demonstration projects are vital to ensure that the investments in projects produce longer-term improvements for the field. As stated earlier, it will be important to create one or more on-line resource centers where documents from research projects are easily accessible to others interested in doing similar work (Adult Foundational Education Digital Library Group, February 6, 2023).

In sum . . .

AFE systems reform initiatives have great potential to build new AFE systems that better serve more learners and communities. But they need various kinds of supports, which in turn can be provided by multiple public- and private-sector sources. Action #5 will discuss what advocates can do to generate interest and supports for AFE systems reform efforts.

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Action #5

Collaborate and Advocate for Reforming AFE at National, State, Local, and Program Levels

December 11, 2024

Introduction

In the preceding two-part series over four months, we have discussed:

> Part 1: Why adult foundational education (AFE) reform is needed and what a multi-purpose system might look like; and

> Part 2: What advocates for such a system can do to develop new models relevant to the learners and communities they want to support; financial and in-kind resources they might need; and sources and supporters that can provide those resources.

Now we come to a central question discussed in this NLA group since it began in the early 1990s: How can AFE providers and other partners advocate for and secure the supports they need? This is particularly important now if we want to transition to more effective AFE systems at a time when the future of federal support for AFE and other services for adult learners is uncertain.

As stated in the first message that launched this two-part series on September 10, 2024:

- Funding for the federal Workforce Investment and Opportunity Act (WIOA, https://www.dol.gov/agencies/eta/wioa) has tended to be the primary focus of AFE advocacy efforts since the mid-1990s;

- AFE programs funded under WIOA have had benefits for some learners, for social and economic communities learners are part of, and for the AFE field itself. But the results have been limited, as (a) relatively few (3-10 percent) of the millions of adults with basic skills limitations participate in those programs; (b) the involvement of other stakeholders (e.g., employers, labor unions, healthcare providers, and others) has been limited or declined; and (c) many former adult literacy programs have closed and professional opportunities for adult educators (e.g., careers that provide family-sustaining wages and benefits) remain limited.

- At the same time, and <u>despite the above challenges, AFE has shown (as demonstrated in Part 1) that well-designed and –supported AFE partnerships with other stakeholders can also produce multiple benefits for our nation</u> (e.g., public health, productive families, economic development, immigrant and refugee integration, public safety and prisoner re-entry, opportunities for disconnected youth and individuals with disabilities, and the health of our democracy and social cohesion). The field has also produced models of demonstration projects, professional development, partnerships between AFE and other stakeholders, and policy and funding that can be learned from and adapted now (Jurmo, October 28, 2023)

- <u>By focusing primarily on the limited outcomes and models developed within WIOA, advocacy has – despite good intentions -- failed to support the growth of our field</u>. In part, this WIOA focus might be due to the lack of understanding (awareness) by advocates and public- and private-sector policy makers of other non-WIOA models that our field has already developed and can be updated today. In part, the narrow focus of current advocacy might be due to a "crisis of imagination and (possibly) courage" needed to challenge the status quo and to transition to a better model through a new multi-level, multi-partner AFE reform effort.

In response to these realities, this two-part series has attempted to provide resources and encouragement to those who want the field to transition to more relevant, more effective, multi-service AFE systems that:

- <u>significantly strengthen and expand the quality and reach of AFE</u> to better equip more individuals and communities to manage opportunities and challenges relevant to them;

- <u>partner with learners and other stakeholders</u> in the communities that learners are part of;

- <u>adapt effective management and instructional practices</u> already developed by AFE and other relevant fields;

- <u>use a multi-phase approach</u> that builds new AFE systems models over time through pilot projects and other capacity-building activities;

- <u>are supported and sustained by multiple financial and in-kind investments</u> provided by diverse public-and private-sector sources at national, state, and local levels.

The Action #5 presented below describes messages and strategies that advocates for AFE systems reform might use to help the field transition to more-effective AFE systems.

<u>Step 1</u>: Build Teams of Leaders and Advocates for More Effective AFE Systems.

At all levels (national, state, and local) and within AFE and other stakeholder groups, efforts for the above-described types of AFE systems reform will require teams of leaders and advocates who:

- <u>understand the why's and how's</u> of such reform;

- <u>understand the learners and communities they want to support and how a series of pilot projects can be developed</u> to develop AFE models customized to the strengths and challenges of those learners and communities;

- <u>have the leadership, problem-solving, and communication abilities</u> to work with others to advocate for and secure resources needed for a reform effort;

- <u>have the time, authority, and logistical resources</u> to participate in a multi-phase systems reform effort that will require sustained work that constructively transitions AFE from the status quo.

It will take real effort, new thinking, creativity, a collaborative spirit, and commitment to do this work. It will be especially important to develop teams that may or may not be part of existing advocacy and planning bodies. The good news is that there are existing planning and advocacy groups that might, with some frank and constructive discussion, make systems-reform a central goal of their mission and activities. Put another way, they might acknowledge that they should and can change what they advocate for and how they can be leaders in proactively building new, more relevant and effective AFE systems.

A few more tips for such teams:

- Such teams might look like/adapt the model of the Community AFE Planning Task Force described under Action #1.

- It is important to be advocating for longer-term systems reform rather than focusing only on particular (though potentially important) individual improvements

(sometimes referred to with terms like "exciting new innovations") to existing inadequate ways of doing things. Put another way, just putting nice sprinkles on a stale cake won't get the results that we want.

Step 2: Create New Advocacy Messages.

Whether at national, state, local, or program levels, it will be important to have well-crafted advocacy messages that clearly state:

- The demonstrated potential of AFE as a resource for building stronger communities;

- What more effective AFE systems would look like at the local level;

- Supports that effective AFE systems need;

- How targeted investments in a multi-phase AFE systems reform effort can help communities build more relevant and effective AFE systems;

- Customized pilot projects and other capacity-building activities to invest in in an initial phase of an AFE systems reform initiative.

Shown below is an example of an advocacy message that might be adapted by advocates at national, state, local, and program levels:

- For nearly three decades, adult foundational education (AFE) programs funded under our federal Workforce Investment and Opportunity Act (WIOA) have benefitted adult learners who have various kinds of basic-skills-related needs. These programs have also produced benefits for learners' families, employers, public health providers, public safety agencies, and other stakeholders with whom those adult learners live and work. By investing in professional development, research, curriculum development, partnership models, and other supports for AFE providers, WIOA and other funding sources have also helped build the capacities of AFE and other stakeholders to customize integrated services to learners and communities. Capacities developed and lessons learned in those efforts can and should be built on to plan and support AFE services for the coming decades.

- But current AFE efforts (both those funded through WIOA and others that are supported by other public and private sources) also face a number of challenges:

  - relatively few (estimates range from 3 to10 percent) of the millions of adults with basic skills limitations participate in AFE programs;

  - involvement in AFE efforts by other stakeholders (e.g., employers, labor unions, healthcare providers, correctional institutions, and others) has been limited or declined since the 1990s;

  - many former innovative adult literacy programs and the resource centers that supported them have closed;

  - experienced adult educators have moved to other endeavors or retired; and

  - professional opportunities for adult educators (e.g., careers that provide in-depth training and family-sustaining wages and benefits) remain limited and undermine the institutional memory and quality of programs.

- As experienced providers and supporters of AFE, we propose that the field transition to a model that:

  - significantly strengthens and expands the quality and reach of AFE to better equip more individuals and communities to manage a wider range of opportunities and challenges relevant to them. Those issues include not just "work-readiness" and "employment" (important as those can be for many learners) but other community issues such as family well-being and children's academic success, public health, public safety and prisoner re-entry, immigrant and refugee integration, environmental sustainability, the well-being of people with disabilities, and – especially important -- democracy and social cohesion (McHugh & Doxsee, October 12018); Jurmo, April 2021; Coalition on Adult Basic Education, Spring 2023; Jurmo, March 2023);

  - partners with learners and other stakeholders in the communities that learners participate in;

  - adapts effective management and instructional practices already developed by and now emerging in AFE and other relevant fields (Jurmo & Mortrude, September 2020);

- o <u>uses a multi-phase approach</u> that builds new AFE systems models over time through pilot projects and other capacity-building activities;

- o <u>is supported and sustained by multiple financial and in-kind resources</u> provided by diverse public-and private-sector sources at national, state, and local levels.

- This "AFE systems reform" initiative would build on previous systems-change efforts within our field and on decades of calls for such reform from experienced researchers and practitioners in our field.

- We seek support from both public- and private-sector policy makers and funders for such an effort. This initiative might be structured not as a sudden change in current policy and funding but as a well-planned, multi-phase initiative that allows current employment-focused funding and policy to continue while new models are developed parallel to (though intertwined with) existing models. New models would be developed in ways that allow for cross-fertilization (integration) of effective practices (e.g., curricula, planning procedures, recruitment, professional development), staff, and material resources (facilities, equipment) across employment-focused and other types of programs. Those other programs might focus on public health, prisoner re-entry, immigrant and refugee integration, people with disabilities, parent and family education, environmental sustainability, etc. The goal would be to create more effective, multi-purpose, community-oriented AFE systems that are customized in flexible ways to the strengths and interests of particular learners and other stakeholders in local communities, thereby equipping them to better manage opportunities and challenges they face.

- In the initial phase of such an initiative project we propose:

  - o <u>Creating and equipping an "AFE Systems Reform Center"</u> (exact title to be decided) within an existing institution or new one that would coordinate, support, monitor, document, and report on this effort. This Center would have core administrative staff, technical experts, and other necessary resources such as a digital library of relevant existing curricula, guidebooks, and reports. (See the models of the previous National Institute for Literacy [Stein, 2000; Chisman & Spangenberg, 2009] and National Center for the

Study of Adult Learning and Literacy [2002], past and current state-level adult literacy resource centers [Siedow, M.D., October, 1996; Chlup, & Tomaszewski, 2008], as well as the more current U.S. Department of Education's LINCS on-line resource center and its Teaching Skills That Matter in Adult Education initiative (https://lincs.ed.gov/state-resources/federal-initiatives/teaching-skills-matter-adult-education) and the proposed Adult Foundational Education Digital Library [Adult Foundational Education Digital Library Group, 2023] as models that could be learned from and adapted for this purpose.)

o Supporting selected pilot projects in relevant areas of AFE by creating and distributing (through a competitive RFP process) guidelines and financial and in-kind supports that would be made available to AFE partnerships interested in implementing an initial round of three-year pilot projects. (See the model of the National Workplace Literacy Program [Evaluation Research, 1992] and state workplace education initiatives in Massachusetts and other states [Jurmo, October 1996]). New pilot projects might create new versions of previous systems innovation efforts that developed:

- Workplace basic skills models customized to particular industries, jobs, skill needs, and worker populations. (See the former National Workplace Literacy Program; models developed for the National Retail Federation Foundation and healthcare industry through the Equipped for the Future systems reform initiative of the National Institute for Literacy; the U.S Department of Labor's WIRED initiative's support for basic education within the transportation/logistics/distribution industry; research on the basic skills needs of small businesses (Jurmo, Spring 2020).

- Worker education models developed by labor unions (Sarmiento & Kay, 1990; Open Door Collective, October 1, 2019; Jurmo, March 2021);

- Family literacy programs (See the National Center for Families Learning [https://familieslearning.org] and the Goodling Institute for Research in Family Literacy at Pennsylvania State University [https://ed.psu.edu/research-grants/centers-institutes/goodling-institute]);

- - Integrating AFE with the work of institutions that support <u>immigrant and refugee integration</u> (McHugh & Doxsee, October 2018);

  - Integrating AFE with efforts to promote digital access and digital literacy (See the work of the EdTech Center at World Education, [https://edtech.worlded.org] and Bergson-Shilcock, Treschitta, & Mortiere, 2022; National Skills Coalition, 2022; Office of Educational Technology, 2022);

  - Integrating AFE with the work of <u>public health</u> institutions (Open Door Collective, September 30, 2019b);

  - Integrating AFE with the work of institutions that provide <u>services to incarcerated and formerly-incarcerated individuals</u> (Open Door Collective, December 10, 2018);

  - Integrating AFE with the work of institutions that support <u>environmental sustainabili</u>ty (Open Door Collective, September 30, 2019a).

  - <u>A common purpose of such projects</u> would be to develop AFE as an important resource for building stronger communities. We look forward to working with others who have a similar vision for an expanded, collaborative effort to renew AFE.

<u>Step 3</u>: Adapt advocacy messages to generate supports from relevant public- and/or private-sector stakeholders.

While it will be important to advocate for such AFE systems reform efforts at the national level, for several reasons we should not put all of our eggs in the "continuing WIOA funding" basket:

- WIOA funding and federal funding for other services relevant to adult learners and their communities is currently uncertain.

- Even if WIOA or other funding for AFE continues through the U.S. Department of Education, other federal agencies also can and should play roles in a multi-department effort to support AFE. We can learn from past involvement of the U.S. Department of Labor, Small Business Administration, federal correctional programs, and Department of Commerce. We should also consider how other federal agencies that support services (related to public health, libraries [Spangenberg, 1996], immigration [McHugh & Doxsee, October 2018], civil rights, housing, environment, disabilities, and Indian Affairs, for example) might play roles in a "whole of government" initiative.

- Because some states and local communities provide significant funding to AFE programs, funders and policy makers at those levels might also be communicated with, to clarify how and why they can support AFE reform, adapting the above-described strategy for the federal government.

- Other non-governmental institutions have historically provided significant help to AFE in the forms of advocacy, public awareness, recruitment of learners and volunteers, funding for AFE services to their employees or customers, research, and policy development. In fact, such involvement and leadership (by employers, labor unions, healthcare institutions, universities (Open Door Collective, January 10, 2019), the legal profession, correctional agencies, among others) have often triggered interest and investment in AFE by public officials (e.g., mayors and governors) and government funders (Chisman & Spangenberg, 2006; Waite, 2019).

With a relevant version of such an advocacy message in hand (and a readiness to adapt it to various audiences), leaders and advocates should decide which public- and private-sector audiences they should target it to. Options include:

- Public- and private-sector institutions and individuals representing various relevant community stakeholders that have (a) a stake in a well-equipped adult populace and (b) a history of providing financial and/or in-kind supports to AFE.

- Other institutions and individuals who might have an interest in supporting AFE but have not yet done so.

- The general public and community groups (aka, civil society institutions) representing various populations who might have basic skills-related needs (e.g.,

families who want to ensure their children's academic success, families and friends of incarcerated or formerly incarcerated individuals who want another chance for secondary and/or post-secondary education, immigrants and refugees who need ESOL services). In this case, AFE advocates might invite those audiences to write letters of support for AFE services customized to the needs of the communities that those audiences represent.

Such advocacy messages might be disseminated through these channels:

- Op-Ed pieces in relevant newspapers and publications;
- Radio, TV, or podcast interviews;
- Presentations at relevant meetings and conferences of AFE and other stakeholder groups;
- Letters to key decision-makers in AFE and other stakeholder groups;
- One-to-one meetings (in person or via on-line conferencing) with those decision-makers;
- Videos showing what customized programs look like, posted on a relevant website;
- An online collection of relevant resources that various stakeholders can be referred to;
- Invitations to funders and policy makers to visit model AFE programs.

Adult learners (Coalition on Adult Basic Education, March 2023; Jurmo, March 27, 2023) and other inspiring individuals who can attest to the benefits of AFE (e.g., learners' family members, employers, labor union representatives, and healthcare providers) might be featured in these communications, as well as AFE providers who have run successful programs like those being advocated for now.

Once those messages are sent out, advocates also need to be willing and able to communicate and work with stakeholders who express a potential interest in supporting the proposed AFE reform effort. Advocates need to clarify how those stakeholders' resources might benefit AFE efforts in general and an AFE systems reform initiative in particular.

In such follow-up communications, advocates need to recognize that their requests must be reasonable and clearly stated, to avoid overwhelming and scaring away potential supporters with too many requests and too much information. Requested supports might range from the relatively simple (e.g., providing space for meetings of a Community AFE Planning Task Force or making a modest financial donation to an AFE Innovations Fund) to more complex (e.g., a university department might assign researchers to serve as evaluators of a pilot project, or a foundation might fund one or more staff positions for the

Community AFE Planning Task Force). (For more advocacy-related ideas, see ProLiteracy's *Advocacy Toolkit for Adult Education and Literacy* at https://www.proliteracy.org/wp-content/uploads/2023/10/2021-03-PRG-AdvocacyToolkit-1208-MAR2021.pdf).

Step 4: Create a series of collaborative (team-based) pilot projects customized to particular learners, stakeholders, and their interests and strengths, with ongoing continuous improvement and a view to the future.

As stated earlier in Action #3, while it might be tempting for advocates to want to launch a full-scale AFE systems reform initiative equipped with well-prepared administrative staff, technical experts (with expertise in curriculum development, partnership building, etc.), facilities, and other material resources, such an initiative would require funding and other supports that might not be realistic – at least in the short term. An alternative, more feasible approach might be to start with a modest number (even one) project(s) in which staff, curricula, and partnership models are assembled and further developed through application in real pilot project(s) customized to the interests, strengths, and needs of participating learner populations and stakeholder partners using the resources that are available.

For example, through a community needs assessment, a Community AFE Planning Task Force might identify:

- a foundation, one or more employers, and a university healthcare or workforce development department interested in collaborating with an AFE provider to pilot an ESOL program for women who want to work as home health aides and nursing assistants in nursing homes;

- a correctional or prisoner re-entry agency and a family services provider interested in creating a family literacy program for women inmates or former inmates;

- a funder, a digital access program, and a financial services company interested in working with an AFE provider to create a digital literacy program that helps AFE learners to use digital technologies to manage financial literacy tasks (e.g., paying bills, using credit cards, understanding the salaries and benefits they receive from their employers.)

Launching, implementing, and learning from such focused pilots would enable the Community AFE Planning Task Force to (a) provide useful services to particular learners and partner stakeholders; (b) build the capacities of AFE providers to provide such

customized services; and (c) get the word out to local communities and stakeholders about the benefits of collaborating in such community-oriented AFE efforts.

Step 5: Monitor and learn from those pilots while developing new policies and funding for a system of such models at national, state, and local levels.

By monitoring, continuously improving, learning from, and publicizing such pilot efforts, the Community AFE Planning Task Force can create the building blocks for a transition to a new way of doing AFE within that location (local, state, or even national). Those building blocks include:

- experienced staff with expertise and tools needed to build partnerships, create relevant assessment and instructional resources, and manage administrative tasks required of customized, integrated AFE services;

- relationships with community stakeholders who see the benefits of partnering in AFE programs customized to their interests;

- relationships with public- and private-sector funders and policy makers who similarly understand the why's and how's of supporting such initiatives;

- awareness within various population groups about the potential benefits of participating in customized, learner-centered AFE programs.

In sum . . .

AFE systems reform initiatives have great potential to build new AFE systems that better serve more learners and communities. But such initiatives have many moving parts and require systematic planning, piloting, and supports, assembled and fine-tuned through creative, collaborative efforts in increments over time.

Action #6 will discuss the vital need for leaders willing and able to guide and support AFE systems reform.

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Action #6

Build and Exercise Leadership for AFE Systems Reform

December 17, 2024

Introduction

Now we come to another important question: Who can be the leaders of such a systems reform effort and how can those leaders themselves be supported? The following Action #6 is organized around these sub-questions:

1. What are the strengths that effective leaders for AFE systems reform need?

2. What roles might leaders play in an AFE systems reform effort?

3. Where might such leaders come from?

4. What supports might they need to succeed as leaders (and who can provide those supports)?

Readers are encouraged to read and reflect on this document and the resources listed at the end, as well as on the other messages sent out to the NLA Discussion Group in this two-part series that began in September 2024.

Question #1: What are the strengths that effective leaders for AFE systems reform need?

General principles of effective leadership

Bookstores, the Internet, and leadership training programs are places where we can find guidelines for effective leaders. For example, an on-line search for "leadership quotes" takes us to the following:[3]

1. A leader is best when people barely know he exists, when his work is done, his aim fulfilled, they will say: we did it ourselves. —Lao Tzu

2. Where there is no vision, the people perish. —Proverbs 29:18

3. I must follow the people. Am I not their leader? —Benjamin Disraeli

4. You manage things; you lead people. —Rear Admiral Grace Murray Hopper

5. The first responsibility of a leader is to define reality. The last is to say thank you. In between, the leader is a servant. —Max DePree

6. Leadership is the capacity to translate vision into reality. —Warren Bennis

7. Lead me, follow me, or get out of my way. — General George Patton

8. Before you are a leader, success is all about growing yourself. When you become a leader, success is all about growing others. —Jack Welch

9. A leader is a dealer in hope. —Napoleon Bonaparte

10. You don't need a title to be a leader. –Multiple Attributions

These and similar leadership guidelines and principles are useful to inspire us and to help us think in different ways about the why's and how's of leadership. (We can also learn from examples of negative leadership that are presented to us in literature and scripture, and – *especially now* -- in current news accounts.)

Learning from what others say and do regarding leadership can be useful as we consider the particular question of "What are the strengths that effective leaders for AFE systems reform need?" It will be important for us to be more specific and thoughtful about this question and not just slap more-generic definitions and guidelines onto the task of answering this question.

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[3] These quotations were found on December 17, 2024 on the *Forbes* Magazine website at https://www.forbes.com/sites/kevinkruse/2012/10/16/quotes-on-leadership/

In the previous "Action 5" message, we stated:

At all levels (national, state, and local) and within AFE and other stakeholder groups, efforts for the above-described types of AFE systems reform will require teams of leaders and advocates who:

- *understand the why's and how's of such reform;*

- *understand the learners and communities they want to support and how a series of pilot projects can be developed to develop AFE models customized to the strengths and challenges of those learners and communities;*

- *have the leadership, problem-solving, and communication abilities to work with others to advocate for and secure resources needed for a reform effort;*

- *have the time, authority, and logistical resources to participate in a multi-phase systems reform effort that will require sustained work that constructively reforms the status quo.*

While the above general overview of "leadership for AFE systems reform" might be a good start, it will be useful to flesh out what the "leadership, problem-solving, and communication abilities" mentioned in the third bullet would include. Here are some suggestions for us to consider (and revise and add to), based on years of experience and research related to developing leadership for high-quality AFE:

Effective leaders for AFE systems reform should , , ,

- Have an informed, clear vision of the kinds of high-quality AFE systems we want to create, the supports such systems need, and actions to secure those resources and put them to work to create and sustain such systems.

- Be well-organized and disciplined to move forward with this work in stages, using the vision as a guide and inspiration.

- Take a can-do, problem-solving, continuous-improvement approach to anticipate, recognize, and efficiently deal with problems and opportunities that emerge at both the macro- and micro-levels of this work.

- Be able to work with others to build and support collaborative teams to do this work. Be sure to provide others with the supports (e.g., family-sustaining wages and benefits, a positive work environment, professional development opportunities) they need to grow and persevere.

- Be creative, resilient, and patient, willing and able to creatively use available resources (while dealing with obstacles that might arise) to incrementally achieve positive results and assemble them into an ongoing effort.

- Be able to multi-task (as an individual and with others) to manage the many tasks involved in creating new ways of doing things.

- Have the courage to identify negative behaviors, policies, attitudes, or other factors that need to be dealt with – and then deal with them in firm, diplomatic, productive ways (rather than avoiding conflict, grumbling, being frustrated, or over-reacting, and generally not modeling the kind of strong leadership that AFE needs.)

- Have a positive, clear message about why systems reform is needed, what more effective AFE systems look like, and what is needed to create and sustain such systems. Then be willing and able to clearly and positively present and use that message to guide and gain support for systems reform. But, while "preaching" isn't something you should do too much of, sometimes an inspiring speech can be useful, as can an occasional tongue-lashing and kick-in-the-pants to those who are stuck in negative modes of behavior.

- Be able to both take the work seriously and give yourself and others permission and encouragement to celebrate and enjoy the work. See this as an opportunity to work with others to do good things for the world, especially at this time when good work is so needed.

Question #2: What roles might leaders play in an AFE systems reform effort?

Now we come to this question of "What roles might leaders play in an AFE systems reform effort?" Put another way, we might ask "What do leaders in such an effort *do*?"

Here are some possible answers to these questions (again presented for you to consider, revise, and adapt):

- Good leaders are needed in all aspects of AFE work, from management/ administrative tasks (e.g., program planning, partnership building, management of budgets and operations) to direct-service provision (assessment, instruction, counseling) to provision of policy and financial and in-kind supports to AFE service providers.

- This is especially true for those who want to transition AFE to the kind of multi-purpose, high-quality systems we've proposed in this discussion series. For example, effective leaders can:

    - bring reform-minded advocates from AFE and other stakeholder groups together in the kind of Community AFE Planning Task Forces described earlier in this series.

    - facilitate the kinds of community AFE needs assessment and planning process described in previous messages.

    - work with others to generate support for pilot projects that can demonstrate the potential of better ways of doing AFE while building capacities to implement additional pilots.

    - jump into the pilot projects as instructors, counselors, evaluators, and helpers, contributing their own expertise and other resources while learning from the experience.

    - facilitate the evaluation of such pilot efforts, to identify ways to improve similar future efforts.

- Leaders can play similar roles not only at the program and community level but at state, regional, and national levels, as well. Leaders should not wait to be told what to do by some national- or state-level body (though the support of such bodies should be welcomed). Leaders should instead be willing to be pro-active in initiating AFE reform-related efforts at the local and program levels. AFE reform should not be seen as a top-down effort. Rather, the kind of systems reform proposed here should be a multi-level effort of those who want to develop more effective systems customized to the needs, interests, and strengths of various learner populations and other community stakeholders (Jurmo, October 28, 2023).

Question #3: Where might such leaders come from?

Action #5 stated:

It will take real effort, new thinking, creativity, a collaborative spirit, and commitment to do this work. It will be especially important to develop teams that may or may not be part of existing advocacy and planning bodies. The good news is that there are existing planning and advocacy groups that might, with some frank and constructive discussion, make systems-reform a central goal of their mission and activities. Put another way, they might acknowledge that they should and can change what they advocate for and how they can be leaders in proactively building new, more relevant and effective AFE systems . . .

. . . It is important to be advocating for longer-term systems reform rather than focusing only on particular (though very important) improvements (sometimes referred to with terms like "exciting new innovations") to existing inadequate ways of doing things. Put another way, just putting nice sprinkles on a stale cake won't get the results that we want.

While these words and those presented under Question #2 and Question $3 are useful, they will be rendered moot if we don't have actual people willing and able to take on leadership roles. We should consider where such leaders might come from. Options include:

<u>From within the AFE field</u>

The AFE field, fortunately, has many program managers, teachers, and other practitioners who regularly perform many of the roles of leaders described under Question #2 and demonstrate the kinds of leadership strengths described under Question #1. These individuals can, with encouragement, guidance, and other supports, intentionally become advocates and leaders for better ways of doing AFE (Jurmo, April 2002; Taylor, March 2021; Coalition on Adult Basic Education, Spring 2024).

Also within AFE are adult learners (both current and former students – and possibly new ones who will enter the field) who have already shown interest and ability to take on leadership roles within their programs and within the larger communities they participate in. As with the above-described practitioners, these learners need encouragement, guidance, and other supports if they are interested in becoming advocates for and supporters of improving and expanding AFE (Jurmo, March 27, 2023; Coalition on Adult Basic Education, Spring 2023).

<u>From other stakeholder partners</u>

AFE practitioners and learners have very important roles to play in advocating for and implementing AFE systems reform that better serves not just learners but other community stakeholders, as well. But those AFE practitioners and learners can't – and shouldn't – do all of this work by themselves. Those "other community stakeholders," if they are to benefit from AFE services customized to their interests, can and should also contribute to systems reform.

Those other stakeholders include employers, labor unions, workforce and economic development agencies, public libraries, and organizations that provide supports related to public health, prisoner re-entry, K-12 schools, environmental sustainability, disabilities, immigrant and refugee integration, housing, and other issues that impact adult learners and their communities. Those stakeholders can collaborate with AFE programs in a number of ways, including providing education that integrates the learning of basic skills with knowledge and skills relevant to other social and economic needs, provision of financial and in-kind supports to AFE programs, cross-training of staff from AFE programs and other stakeholder partners, and joint advocacy for AFE. The kinds of pilot projects proposed in preceding messages in this series are venues in which other stakeholder partners can provide vital, practical leadership for new kinds of integrated AFE services.

<u>From funders and policy makers</u>

Public-sector funders and policy makers can provide important financial and in-kind supports for AFE systems reform by advocating for and funding pilot projects and professional development for those doing this work. (These pilots should include a substantive action research and evaluation component that generates knowledge that can inform ongoing systems improvements.) Funders and policy makers can also support the integration of AFE into economic and workforce development, public health, corrections, housing, and environmental sustainability services that those funders and policy makers already support. Special emphasis can be placed on creating new models of AFE integrated with other relevant social and economic issues.

Private-sector donors (e.g., foundations, corporate giving offices, individuals) can also provide funding and in-kind help (e.g., advisory services, facilities) to AFE reform efforts and to developing leaders for those efforts in particular. This help might take the forms of funding faculty positions or fellowships in university adult education departments, travel costs for leaders to visit other sites or attend leadership conferences, an online resource center for adult educators, an AFE Innovations Institute at a university or community college, or refreshments and facilities for AFE leadership meetings.

<u>From the general public</u>

The general public can be an important source for recruiting and nurturing new leaders for AFE efforts. Examples include older career changers who possess important life experience and professional skills, university students looking for a meaningful career path, former military personnel and aid workers (e.g., Returned Peace Corps Volunteers and AmeriCorps Volunteers) who have training and experience as leaders in difficult situations, and people from various population groups impacted by basic skills-related challenges (e.g., immigrants and refugees, currently and formerly incarcerated individuals, people with disabilities, out-of-school youth). Special outreach, training, fellowships, and paid jobs might be provided to these individuals to help them get involved in AFE systems reform.

Question #4: What supports might they need to succeed as leaders (and who can provide those supports)?

While it is important to recognize the need for reform-minded leaders for AFE, those individuals taking on leadership roles shouldn't be expected to do this work for free or as an add-on to jobs in which they already are committed to other responsibilities. As professionals, leaders for AFE reform need family-sustaining wages and benefits, professional development opportunities, and other supports, incentives, and opportunities (e.g., multiple pilot projects that provide opportunities to field-test and learn from new models of AFE) to stick with this work over time. The "other stakeholders" and "funders and policy makers" described above are potential sources for such supports.

In sum . . .

AFE systems reform initiatives have great potential to build new AFE systems that better serve more learners and communities. But such initiatives have many moving parts and require systematic planning, piloting, and supports, assembled and fine-tuned through creative, collaborative efforts in increments over time. This Action #6 and previous messages point to the types of leaders AFE systems reform needs, roles they can play, where such leaders might come from, supports they need, and where those supports might come from.

This two-part series has laid out arguments for better AFE systems and strategies that we can use to move forward with new AFE systems reform efforts at national, state, local, and program levels. Now is an important time – with both significant challenges and opportunities -- for our field and for the learners and communities who can benefit from high-quality AFE.

Will we continue advocating for current models of AFE which have both strengths and some real limitations in terms of their reach and relevance? Or will enough of us in the AFE field and other stakeholder groups step up to re-organize, strengthen, and expand what we do, to create the kinds of AFE systems adult learners and their communities need and deserve?

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Action #7

Think, Talk, and Act Differently to Reform AFE

December 29, 2024

Introduction

Now we come to the final message in this two-part series. It is written as we as a nation come to the end of one eventful year and look ahead to another year in which we will again likely face significant challenges and opportunities. While we in the adult foundational education field can't control all the variables our nation faces, we can in our own way help to shape our nation's history. More specifically, we do have the opportunity to significantly strengthen and expand AFE as a force for good in our society. As laid out in the two-part series that precedes this message, we can build on the good work that our field has done and continues to do, incorporate new strategies and work with more partners, and undertake thoughtful, forward-thinking AFE systems reform efforts at national, state, local, and program levels. By so doing, we can help more adult learners and other stakeholders deal effectively with the opportunities and challenges they will be facing in 2025 and beyond.

For us to help the field transition in these ways, we will need to think, talk, and act differently, as summarized below.

Think differently

As stated in previous messages in this two-part series, we need to:

- Be willing and able to consider other ways of doing AFE and to engage in constructive dialogue and continuous improvement.

- Develop a deeper analysis of the multi-dimensional problems (challenges and opportunities) that adult learners, their communities, and the AFE field face.

- Develop a vision for better AFE systems that help individuals and stakeholder groups deal effectively with relevant opportunities and challenges.

- Develop and use evidence-informed strategies to build more effective AFE systems (and avoid simplistic, partial, magic pill solutions).

- Identify principles (values) to guide how we will carry out this work.

Talk differently

When talking with various audiences (including ourselves) about AFE, we need to . . .

- <u>Avoid platitudes</u> about adult learners and AFE.

- <u>Be both realistic and positive</u> about what learners can do, the supports they need, and how well-planned, well-supported, integrated AFE systems can support learners.

- <u>Respect AFE as a profession</u> that, like other professions, requires well-prepared and -supported individuals (both professionals and para-professionals) to do the various types of specialized work required for effective AFE systems.

- <u>Move beyond advocating for the preserving the status quo of the field</u>. Though there are many good things about the status quo that should be learned from and built on, we should not be satisfied with merely preserving the limited service models and investments now available. Instead, we should advocate for systems-reform initiatives that, over time, expand the types of AFE services (like those described below under "Act differently") that can equip learners and communities to better manage a wider range of realities.

Act differently

We need to consider how each of us can contribute to AFE systems reform in the multiple roles we play in the diverse institutions we work in at national, state, local, and program levels. Examples to consider:

- <u>Individual AFE programs – in partnerships with other stakeholder groups</u> -- can develop AFE systems integrated with other supports customized to the learning needs of diverse learner populations and their communities. For example, AFE programs can:

  - <u>Work with K-12 schools and family service agencies</u> to provide intergenerational (family) literacy activities integrated with other supports. These would enable parents and other caregivers to help their children, elders, and other family members deal with academic and other personal needs.

- o Work with forward-thinking employers and labor unions to provide specialized educational and other supports (e.g., access to digital technologies and other tools, job counseling, mentoring, transportation) to workers in particular industries. The goal would be to help them move into, perform, and advance in family-sustaining and otherwise rewarding employment. In addition to developing their abilities to perform social and technical tasks in their jobs, workers can learn how to ensure their own health and safety and that of co-workers, customers, and others in the work environment. Learners can also improve their ability to understand and manage their income and benefits and ensure their financial security.

- o Work with immigrant and refugee service providers and local communities to help new arrivals develop language and inter-cultural skills and other assets (e.g., citizenship status, support systems) to integrate productively into American communities.

- o Work with correctional and public safety agencies and inmate support groups to help individuals with criminal records to develop skills, knowledge, social-emotional strengths, credentials, support systems, and other assets they need to productively participate in their families and local communities and economies.

- Policy makers and funding agencies in local, state, and federal governments can take a collaborative, multi-disciplinary, whole-of-government approach to building local-level, integrated AFE systems customized to community needs and strengths. In practical terms, policy makers and funders might support a series of demonstration (pilot) projects in which AFE programs and partners develop, document, and disseminate models of AFE that focus on particular learner populations, stakeholder groups, and applications of basic skills. Such demonstration models might be coordinated along the lines of the Equipped for the Future (EFF) Initiative of the National Institute for Literacy. (EFF developed a research-based model of contextualized, participatory adult basic skills education and collaborative program planning, field-tested it in collaboration with industry associations and other partners, provided training and technical supports to implementers of such programs and to relevant funders and policy makers, and developed collaborative evaluation strategies to continuously improve and learn from each project.) The various demonstration projects that might fall under this coordinated initiative might borrow from:

  - o Workplace literacy demonstration projects carried out by the National Workplace Literacy Program, state workplace literacy initiatives (e.g., the

Massachusetts Workplace Education Initiative), the U.S. Department of Labor's WIRED Initiative, and models developed by a number of labor unions and trade associations (for healthcare, printing, hospitality, retail, transportation, and other industries).

- o <u>Health literacy initiatives</u> carried out at state (e.g., Florida and Wisconsin) and local levels (e.g., in Massachusetts) by AFE providers and healthcare service providers and researchers.

- o <u>Family literacy models and related research</u> supported by the National Center for Families Learning, the Goodling Institute for Research in Family Literacy (at Pennsylvania State University), and other sources.

- o <u>Education for current and former inmates</u> carried out by correctional and re-entry institutions, community colleges, and public- and private-sector funders.

- o <u>College transition and career pathway models</u> that developed systems for moving adult learners into post-secondary education and rewarding careers, supported by the National College Transition Network and other sources.

- o <u>Digital literacy and digital access initiatives</u> to build the capacities of AFE programs to help learners develop both digital literacy skills and access to digital technologies. Such initiatives have received supports from the former Adult Literacy Technology Network and the current Ed Tech Center at World Education, the National Skills Coalition, and the federal government.

- o <u>AFE-related research and professional development supports</u> provided by the National Center for the Study of Adult Learning and Literacy; the Literacy Information and Communication System (LINCS) of the US. Department of Education); regional (e.g., Literacy South), state- and local-level adult literacy resource centers; national AFE organizations (e.g., COABE, ProLiteracy, TESOL, Adult Numeracy Network); and university-based adult-literacy-related graduate programs.

- o Urban adult literacy initiatives which, in various forms since the 1980s, have supported public awareness, collaboration, financial and in-kind resources, and professional development for AFE networks serving U.S. cities.

- o Adult learner leadership initiatives designed to help learners be effective problem-solvers within their AFE programs and in the various life roles (work, family, civic) they participate in.

- Leaders in business and labor – both individual companies and unions and employer and labor associations – can consider how they might re-engage as key supporters of AFE reform in the U.S. They might start by learning about the Business Council for Effective Literacy; key roles that employers played in national, state, and local AFE initiatives; the major leadership roles that the AFL-CIO has played in AFE; the National Workplace Literacy Program which served as a proving ground for new forms of worker education; and how national television networks and media associations and companies helped generate public awareness of, investment in, and learners and tutors for adult literacy education.

- Supporters of particular populations impacted by basic-skills-related challenges (e.g., individuals with disabilities, out-of-school young adults, older adults, the incarcerated and formerly incarcerated, people experiencing housing insecurity, people at risk of poor health, communities impacted by environmental problems) can collaborate with AFE service providers in multiple ways.

- Private foundations, corporate giving offices, and individuals can support AFE systems improvement by funding planning task forces, research, professional development, and/or pilot projects designed to support systems reform. (The Gannett Foundation, B. Dalton Bookseller, and the Ford Foundation, among others, provided such systems-improvement supports in the past. Their models might now be adapted to new systems reform efforts at national, state, and local levels.) Private-sector funders often have flexibility and resources to support concrete improvements, even small ones, that can be learned from and built on by other funders and AFE stakeholders.

- Universities can provide many types of useful supports for AFE efforts at national, state, and local levels. These include research and evaluation services, professional training for adult educators and other stakeholders, space for conferences and meetings, home bases for demonstration projects like those

described under "Act differently" above, fundraising and advocacy supports, and AFE services for university employees.

(Many of these models are described in the previous messages in this two-part series. The author is happy to point readers to relevant resources on request.)

In sum . . .

AFE systems reform need not be seen as a pie-in-the-sky goal that maybe someone else can undertake one day when (a) the political climate is different; (b) the economy is generating funds (e.g., public taxes, corporate profits) that can be invested in government or non-governmental AFE projects; or (c) AFE leadership gets around to recognizing the need for systems change and figures out how to make it happen. Put another way: Spinning our wheels won't help AFE respond effectively to the challenges and opportunities that learners, their communities, and our field now face.

While it might be helpful to have a new version of the National Institute for Literacy or other federally-supported entity take the lead in organizing a national reform initiative, it might be that change can and must be nurtured within a variety of governmental and non-governmental entities at not just national but also at state, local, and program levels. Again, past and current models of such initiatives (like those described under "Act differently" above) have produced good models of contextualized instruction and collaborative AFE partnerships, experienced practitioners, and financial and in-kind resources. No need to start from scratch and reinvent the wheel. Those previous models should be learned from and adapted to create AFE systems relevant to today's realities.

Leadership for more effective AFE systems can come from– and is already brewing in – diverse stakeholder groups, levels, and individuals within our profession. Those willing to think, talk, and act differently should – with humility, respect, imagination, discipline, and courage -- speak up and begin working together in the new period we are now entering.