

Learners as Leaders for Stronger Communities

Renewing Participatory Learning,
Learner Leadership, and
U.S. Adult Foundational Education



A Working Paper

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Contents

Foreword	p.i
• Why and How this Working Paper Was Written	p.i
• Limitations	p.ii
• How to Navigate this Document	p.iii
• Acknowledgments	p.iii
• Credits	p.iii
• Glossary	p.iii
Summary	p.1
<u>Part 1: Evolution of Participatory Adult Foundational Education and Learner Leadership</u>	p.5
• Mid-1980s to Mid-1990s: Grassroots Growth of a Participatory Approach	p.5
• Mid-1990s into the 2000s: Formalizing Support for a Participatory Approach and Learner Leadership	p.22
• More Recent Developments in the 2000s	p.28
<u>Part 2: Benefits and Challenges</u>	p.45
• Potential Benefits	p.45
• Potential Challenges	p.46
<u>Part 3: Actions to Renew US Adult Foundational Education</u>	p.51
• For the Field as a Whole	p.53
• For Supporters of Community-Oriented AFE and Leadership Development	p.58
• For Community-Level Implementers	p.60
Conclusion	p.63
References	p.64
Appendices: More-Detailed Actions for . . .	
A. The Field as a Whole	p.80
B. Supporters of Community-Oriented AFE and Leadership Development	p.88
C. Community-Level Implementers	p.93
Endnotes	p.98

Foreword

Why and How this Working Paper Was Written

In 2021 and 2022 I saw a growing interest within the U.S. adult foundational education (AFE, see Glossary below) field in the question of “how to support adult learner leadership development.” Having worked on that question for many years and seeing that the *COABE Journal* by coincidence was calling for articles on that subject (to be published in a special edition in 2023), in August 2022 I began typing up some thoughts. The resulting article began to grow and soon passed COABE’s 4000-word limit, as evident in the many pages below.

In writing this current version over eight months, I drew on my doctoral dissertation (whose topic was participatory approaches to adult literacy education in the U.S.) and my subsequent four decades of work – as a researcher, evaluator, administrator, curriculum developer, professional developer, advocate, and lifelong learner – in which I tried to figure out how to apply various versions of the participatory approach in AFE programs in the U.S. and other countries. I also did an extensive review of primary source and other documents in my professional collection and online. These documents (e.g., reports from conferences and meetings, newsletters, curriculum guides, articles, policy papers) were produced by the adult literacy field from the 1980s to now. I also conducted interviews and exchanged correspondence with individuals who have been actively engaged in the participatory education and learner leadership activities described in this document. As this research unfolded, I realized that the intertwined concepts of participatory education and learner leadership could be important tools for AFE advocates who want to reform AFE in the U.S. Several leaders in AFE reviewed a working draft and submitted helpful comments. I made revisions accordingly.

I offer this Working Paper as a resource to those who not only want to support learner leadership but apply that idea – and the underlying participatory approach at the root of learner leadership – to create more effective, community-oriented AFE systems. (See Glossary below.) Those community-oriented systems would expand

and strengthen the purposes, content, and reach of AFE, to more effectively help more learners and communities manage the opportunities and challenges they encounter in work, family, civic, and lifelong learning social contexts.

This updated approach to participatory AFE and adult learner leadership would build on the great work of many individuals and organizations, especially the 25-year-old adult learner leadership organization, VALUEUSA. As the final touches were being put on this document on May 21, 2023, VALUEUSA director Marty Finsterbusch announced that it would be closing in May 2023 due to lack of funding. We salute Marty for his *decades* of work – since the 1980s -- supporting AFE and learner leadership and hope he will have new opportunities to serve adult learners and our nation.

Limitations

I have attempted to provide a comprehensive overview of the many variations of participatory literacy education and adult learner leadership over four decades. But limitations of time (to do this work) and space (numbers of pages that are reasonable for readers to take on) have required me to leave out details of many significant programs and activities. Readers are encouraged to read through the references cited in the text for more such examples. And I hope that individuals and programs whose good work is not cited here will understand that my doing so is not a sign of disrespect.

I hope that, rather than dwelling on what's missing here, others will be inspired and informed to document and share additional past, current, and future examples of such work. They might do this through expanded capacity building supports that include professional development, new research, new versions of the kinds of documents cited here, and an online digital library. (I will be happy to share the boxes of related resources in my basement that are now looking for a good home!) I also hope that the actions described in Part 3 will be adapted in creative ways to produce the new thinking and resources that a community-oriented approach to AFE will require.

How to Navigate this Document

I realize that the idea of wading through a 100-page document might scare off potential readers. But forty percent of the document consists of three appendices that are more-in-depth versions of material covered in Part 3. If and when readers want to proceed with the collaborative planning process described in Part 3, they can then use those appendices. Similarly, readers who want to learn more about the many examples described in the text can do so by accessing relevant URL links provided throughout the document.

Acknowledgments

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Credits: Document design and cover photo (*Tug*) by the author.

Glossary

The following terms are used frequently in this document. Some might be altogether new to readers or used in ways that are different than how readers might normally hear them used.

Adult foundational education (AFE): The term *adult foundational education* was adopted in 2022 by the Open Door Collective with input from other stakeholders. This newer term, AFE, refers to the diverse types of instructional and other services that help U.S. adults and out-of-school youth to (a) strengthen their “foundational skills” (e.g., oral and written language, numeracy, digital literacy, problem-solving, collaboration, and others); (b) build social-emotional strengths; and (c) develop credentials, personal plans, support systems, and other

tools they need to perform work, family, civic, and academic roles. AFE services are based in multiple institutions and communities, serve diverse populations of adults and out-of-school youth, and often involve other stakeholder partners. (*Related terms: adult literacy, adult basic, high school equivalency, adult ESOL, or adult education.*)

Learner leadership development: This refers to activities within the AFE field designed to help learners – as individuals and with others – to develop their abilities to analyze and respond to opportunities and challenges in their lives, for their own benefit and that of others. In the process, learners become able to participate at higher levels of responsibility, control, and reward in their education (rather than as passive recipients) and in other life contexts. Learners develop both basic foundational (aka, basic) skills and leadership abilities by taking on active roles in instructional tasks (e.g., helping to select and shape curricula, serving as classroom aides) and management functions (e.g., public awareness, public policy advocacy, learner recruitment, providing peer support to fellow students, fundraising, outreach to public health programs and other community partners, facilities management) historically performed by teachers or other staff or volunteers. These participatory activities are seen as ways to improve program efficiency, support the personal development of learners, and/or enable learners to work with others to strengthen the families, workplaces, neighborhoods, and other social contexts (“communities”) they participate in. (*Other related terms: student leadership, student involvement.*)

Participatory approach: This refers to an AFE philosophy and methodology that emphasizes helping learners be actively engaged in the learning process, especially through practice of “authentic” (actual or simulated) uses of basic skills that are meaningful to learners. Learners are helped to build on their prior knowledge and skills, focus on improving particular skills they need to perform tasks that are meaningful/important to them, take ownership for their learning, and figure out how to continue building their skills in real-life applications outside the classroom. Participatory learning activities can include project-based learning, field trips, writing, role-playing and student theater, book clubs, community service, and other forms of active learning. (*Related terms: student/learner centered, active learning.*)

Stakeholders and partners: *Stakeholder* refers to individuals and social groups who have – or might have – an interest in investing in and benefitting from the AFE field. Stakeholders include AFE service providers, potential and actual participants (students, learners) in AFE programs, supporters (policy makers and providers of financial or in-kind supports) of AFE services, and representatives of community institutions that adult learners can participate in and benefit from (e.g., learners’ families and social networks, employers, labor unions, healthcare providers, immigrant and refugee services, correctional institutions, and others.) When stakeholders form collaborative relationships with AFE programs, they can become *partners* in the sense that both AFE programs and those other stakeholders invest in each other with the intent to benefit from that relationship.

Community-oriented AFE: This is an approach that focuses AFE services on helping learners deal with the various *communities* (social contexts) they operate in. *Communities* are not limited to geographic neighborhoods but to settings like workplaces, families, healthcare facilities, prisons, clubs, religious institutions, social services, and other social contexts where learners use foundational skills to communicate and solve problems with others. (The term *community-oriented* is borrowed from Hanna Fingeret – who used it in a 1992 ERIC monograph [Fingeret, 1992] and from the *community-based* adult literacy movement of the 1980s and 1990s.) As used in this document, *community-oriented* approach AFE programs often work with other stakeholders (see above) who provide supports that help learners deal with particular life issues they are concerned about. Such an integrated, collaborative, community-oriented approach can, in turn, also help those other stakeholders be better able to work with basic-skills-challenged adults and the AFE programs that serve them. (*Related terms: community-based education, contextualized education*)

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Summary

This Working Paper was written in 2022 and early 2023 as a resource for those who support – or might support -- adult learner leadership development as a central purpose and feature of new, community-oriented adult foundational education (AFE) in the United States. It describes the origins, evolution, accomplishments, and challenges of two inter-related ideas within U.S. AFE:

- a participatory approach to AFE (in which learners have higher levels of responsibility, control, and reward) and
- learner leadership development activities.

Evolution of Participatory Adult Foundational Education and Learner Leadership

In the 1980s and subsequent decades, participatory AFE models were developed in multi-purpose community-based education programs, volunteer adult literacy programs, and programs in workplaces, colleges, family education, and other settings. Diverse learners developed both basic (foundational) skills (e.g., oral and written English, numeracy, problem-solving, collaboration) and other leadership skills by taking on active roles in instructional functions (e.g., helping to select and shape curricula, serving as classroom aides) and management activities (e.g., public awareness, public policy advocacy, learner recruitment, providing peer support to fellow students, fundraising, outreach to public health programs and other community partners, facilities management) historically performed by teachers or other staff or volunteers. These participatory activities were seen as ways to improve program efficiency; support the personal development of learners; and/or enable learners to work with others to strengthen the families, workplaces, neighborhoods, and other institutions they participate in.

Proponents of participatory activities were influenced by a range of sources (e.g., civil/human rights movements, religious principles, research in how adults learn, high performance organizational models, community organizing around health and other local issues).

Participatory education efforts received financial and in-kind supports from diverse AFE institutions and funders.

One major focus of participatory AFE efforts was the development of what came to be known as *learner leadership*. AFE staff were recognizing that their programs could benefit if adult learners (current or former AFE students) took on active roles in “the 4 Rs” of *recruitment* and *retention* of learners, *resource* generation (through advocacy and fundraising), and *reform* (continuous improvement) of adult literacy services (through evaluation and other activities). At national, state, and local levels, learners were becoming spokespersons (to the media, public officials, private sector donors, and other audiences), serving on advisory committees, working as paid or unpaid staff, using their community networks to recruit learners, and providing peer support to fellow learners. Learners were increasingly given opportunities to participate in adult education conferences at national, state, and local levels – both as learners and as presenters. Learners provided advice to decision makers on why and how to use clear language when communicating electoral and healthcare information.

By the end of the 1990s, a national adult learner leadership organization, Voice of Adult Learners United for Education (VALUE) had been launched and continued for the next 25 years (with its name revised to “VALUEUSA”). Since 2000, participatory AFE and adult learner leadership have continued to be supported at national, state, and local levels, though generally in different forms, in different social and institutional contexts, and with different leaders than those involved in previous decades.

Benefits and Challenges

Though information about these participatory AFE programs and adult learner leadership efforts is not always complete, anecdotes and other evidence point to both the potential benefits of such activities and factors that can block their success. Possible benefits include the above-described results for programs (e.g., improved recruitment and retention of learners, increased financial and in-kind supports from governmental and non-governmental sources, improved relevance and efficiency of services) and for learners and their families and

communities (e.g., learners able to more effectively perform work, family, and community roles).

Obstacles to successful learner leadership development include a general lack of awareness of past participatory models that could be learned from and built on now; bureaucratic turfism (jockeying over who gets control of and credit for participatory work); conflicting views of the why's and how's of learner leadership efforts; social contexts that assign low status and low expectations to basic skills challenged adults; and – fundamentally -- inadequate investment of financial, in-kind, and human resources required for high-quality AFE.

Actions to Renew U.S. Adult Foundational Education

This final section makes the case that participatory AFE and adult learner leadership should be central features of a new, community-oriented approach to AFE in the U.S. This approach would focus on a broader range of learner and community needs, serve more learners and more communities (both geographic communities and sub-groups within those communities), use evidence-informed strategies to serve learners and manage and support services, and – importantly – focus on enabling learners to be effective, collaborative problem solvers (i.e., leaders who work with others to manage opportunities and challenges they encounter) in the work, family, community, and lifelong learning “communities” (social contexts) in which they participate.

Helping to move the field in this direction must be done respectfully, systematically, strategically, collaboratively, and in informed ways (e.g., based on an understanding of what has worked and what hasn't worked in previous AFE and learner leadership efforts). Such an approach is more likely to have significant, sustained impacts on wider ranges of learners and communities. Superficial or poorly-planned and -supported learner leadership activities can either not have lasting impact or could produce more harm than good.

The final section of the paper proposes actions that stakeholders (adult educators, adult learners, policy makers and funders, and other potential partners, organized in teams at national, state, and local levels) might take to systematically (a) develop a new vision for a

participatory, community-oriented approach to AFE that is relevant to them; and (b) identify community learning needs and map out how existing and new resources -- including participatory education and learner leadership development strategies -- might be re-organized in new community-oriented AFE systems. Such systems would empower community members to manage problems and opportunities relevant to them.

The following draft vision statement is offered to jump start further dialogue and action:

Community-oriented adult foundational education (AFE) can contribute to the creation of an economy and society that are healthy, productive, environmentally sustainable, safe, and equitable. It can do so by helping adults and out-of-school youth develop the foundational skills and other tools (e.g., background knowledge, educational and occupational credentials, support systems, personal plans, and social-emotional strengths) they need to proactively serve as effective leaders (aka, collaborative problem-solvers) in personally-relevant and -rewarding work, family, civic, and lifelong learning roles.

Helping adult learners become more effective leaders can not only help learners as individuals but enable the social partners they interact with -- their families, communities, workplaces, and adult education programs -- operate more effectively. Learner leadership development should thus not be seen as an "add-on" but as a core purpose of AFE and integrated -- in meaningful, user-friendly, respectful, and well-planned and -supported ways -- into all aspects of AFE efforts.

Or as one adult learner leader put it:

Students need to be real leaders, not tokens . . . How can we get students to become real leaders? . . . I'm tired of telling my life story -- I graduated from that. It's time to talk about other things. Teach us to become leaders (Literacy South, n.d., p. 10).

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Part 1

Evolution of Participatory Adult Foundational Education and Learner Leadership

“Learner leadership” emerged from attempts to shift to more participatory forms of adult foundational education (AFE)¹ that began in the 1980s.

Mid-1980s to Mid-1990s: Grassroots Growth of a Participatory Approach²

In the mid-to-later 1980s, a flurry of efforts – by established adult literacy organizations and newcomers³ -- raised awareness, interest, and support vis-à-vis adult foundational education in the United States. Also emerging during this period was a growth in interest in “student involvement”: more active roles for adult learners within and outside AFE. As described in more detail below, adult education programs based in community-based organizations (CBOs), affiliates of the national Laubach Literacy Action and Literacy Volunteers of America networks, and other institutions were intentionally developing and using practices that were variously referred to as “learner-centered,” “learner-oriented,” “active learning,” “participatory,” and similar terms.⁴ These activities were designed to move learners from lower levels of participation (i.e., merely being physically present in a program, giving limited input into the content of programs, and/or being passive recipients of services provided by others) to higher levels of participation in which learners take on greater responsibility, control, and reward vis-a-vis their education. In these activities, learners performed roles that historically were carried out by program staff, volunteers, and others who were not students.

In instruction, learners gave input into the planning and evaluation of instructional content and activities, helped create reading

materials (e.g., student newsletters, learner stories, letters to officials and funders) and other types (e.g., video, drawing) of learning resources, and participated in instructional activities (which might include project-based learning, field trips, role-playing and student theater, book clubs, community service, and other forms of active learning).

In program management, learners participated in program decision-making (e.g., in student advisory councils and decision-making boards) and served as paid or volunteer staff (e.g., as providers of childcare for fellow students' children, as assistant instructors, as clerical or facilities staff). Learners helped with recruitment (through public awareness announcements and less-formal word-of-mouth) and retention (e.g., through peer support groups or mentoring) of other students. Learners also advocated for, generated, and/or managed financial or in-kind resources for their programs or for particular student-led activities (e.g., travel to conferences). Learners helped to recruit, hire, train, and evaluate program staff, as well.

Proponents argued that such participatory practices had the potential to:

- improve program efficiency by helping to make services more relevant, increasing learner motivation to persevere and support the programs, and attracting more learners and supports to the program;
- strengthen the personal development of learners by improving their self-efficacy, social and problem-solving skills, and achievement of personal work, family, civic, and lifelong learning goals; and/or
- support democratic social change by improving learners' ability to understand and deal effectively with social conditions negatively impacting their well-being and that of their families and communities.

Proponents of such activities drew on a number of sources, including civil rights (social justice) movements in the U.S. and other countries, sociolinguistic research (e.g., related to how individuals

learn to read), humanistic education, the communicative approach to foreign language instruction, religious teachings, participatory management, and community organizing (Jurmo, 1987).

Significant leadership for this participatory approach was coming from three segments of the AFE field: “community based” organizations (CBOs), “volunteer literacy” programs, and “other types of AFE programs,” described below:

Community-Based Organizations (CBOs)

As defined by Hunter and Harman (1985), CBOs were locally-controlled non-profit organizations that provided educational and other supports that helped community members deal effectively with personal and community challenges and opportunities. For some community members, those challenges included gaps in literacy, numeracy, and other foundational skills and in educational and occupational credentials they needed. Many CBOs were influenced by the U.S. civil rights movement and/or other U.S.-based social justice movements (e.g., for women’s rights, for workers’ rights, against the Vietnam War). In some cases, CBOs were inspired and informed by similar efforts in developing countries in Latin America and other regions. The goal of CBO-based basic skills programs was to not only help learners improve their reading, writing, oral English, math, and other foundational skills but also support them -- as individuals and in collaboration with others -- to critically understand and effectively deal with the social, economic, health, and other conditions that impacted them (Association for Community Based Education, 1983 and 1986; Fingeret, 1992; Heaney, 1984; Jurmo, April 2021; Wallerstein, 1984).

Learners in such CBOs might, for example, write and reflect about their own lives as children or as mothers and wives, about their jobs and work goals, and about their children. They might visit museums or watch films to learn about their own and other cultures and how to live and work in multicultural environments. Learners were often given support services to help them secure better employment, get engaged in their children’s education, or deal with legal issues (including divorce and abuse). Outside the classroom, learners led student social activities, provided peer support to others from their communities, advocated and raised funds for their programs, and

managed program facilities (e.g., as receptionists). Such activities were designed to help learners to strengthen useful, transferable skills; positive attitudes; connections to support systems; and credentials they could use to benefit themselves and their programs. While tending to focus in particular on the “democratic social change” goal described above, CBOs also recognized the “personal development” and “program efficiency” benefits of active learner participation and adapted research-informed practices developed in literacy and language education, counseling, community organizing, and other related fields (Gordon & Ramdeholl, 2010; Gross, 1989; Jurmo, 1987; Luttrell, 1982; New York Times, 1988).

Volunteer Literacy Programs

Parallel to the above-described innovative work being done in CBOs in the 1980s and 1990s, the two major national volunteer-based adult literacy networks, Laubach Literacy Action (aka Laubach) and Literacy Volunteers of America (aka LVA) were broadening their more traditional, one-to-one tutoring approach in which learners were recipients of fairly standardized and decontextualized instruction provided by others. Volunteer programs were increasingly creating more active roles for learners inside and outside the classroom. This shift included the use of the language experience approach, small group learning (a move away from one-to-one tutoring which most volunteer programs had previously been known for), student-run peer-support activities, and learner involvement as program spokespersons and advocates to recruit learners and generate financial and in-kind supports for programs. Programs also created student publications containing stories written by and for learners (Boutwell, 1989; Demetrion, Spring 1993; Fingeret & Danin, 1991; Jurmo, 1987; Laubach Literacy Action, n.d. & June 1988; Literacy Volunteers of America, n.d.)

Especially significant were Laubach’s and LVA’s creation of opportunities for learners to attend the organizations’ national conferences and eventually to have their own all-student conferences. In 1984, Lutheran Church Women, through its Volunteer Reading Aides program, brought some students to the Laubach conference at Evergreen State College in Washington State (Lane, 1985). In 1986,

Laubach created the first student strand at its national conference (at Memphis State University). It was in Memphis where Laubach staff and an adult learner leader first conceived of the idea of a National Student Congress. That idea came to fruition a year later in 1987 when – on the 200th anniversary of the signing of the U.S. Constitution at the Constitutional Convention -- Laubach sponsored its first all-student Congress. One student from each of the 50 states met at Drexel University in Philadelphia, with support from the Philadelphia Mayor’s Commission on Literacy. At Independence Hall – where the U.S. Constitution had been debated, ratified, and signed 200 years before (and the Declaration of Independence had been signed by the Continental Congress in 1776) -- the student delegates issued a statement about the importance of adult literacy. A second National Student Congress came two years later in 1989 in Washington, DC, this time sponsored jointly by Laubach and LVA. This one included a visit by the student delegates to the White House, where they were hosted by First Lady Barbara Bush. The students also held a rally on the steps of the Lincoln Memorial that was widely covered by the media in the U.S. and even in other countries. A similar, third Congress (also in Washington, DC) followed in 1991.

During this period, other organizations supported the kinds of student leadership activities being promoted by Laubach and LVA. Through its Volunteer Reading Aides program, Lutheran Church Women provided technical supports to learner leadership projects around the U.S., with activities designed to move learners from “passive student involvement” to “active student participation” (Lane, 1985, p.1). State-level adult basic education directors also got involved in sending learners to national conferences from states where there were no Laubach or LVA programs. These events built on each other, to provide opportunities for learners from diverse communities to get to know each other; share concerns and ideas; build personal and social confidence; prepare “student proclamations” for policy makers, employers, the legal system, and other stakeholders (Lane, 1985); and develop leadership skills to bring back to use in their respective programs and communities (Jurmo, 1987; Laubach Literacy Action, 1987 and 1988). In the process, adult education programs came to recognize the potential of student leadership and also learned

how to better work together outside their historical silos. (Laubach and LVA eventually merged in 2002 to become ProLiteracy.)⁵

Other Types of AFE Programs

Similar participatory practices were being developed in other types of programs outside the “CBO” and “volunteer literacy” segments of the field. In “workplace literacy” programs (i.e., AFE for incumbent workers, often carried out in their workplace or labor union facility), labor union educators (Sarmiento & Kay, 1990) and other workforce educators (Jurmo, 2020; Uvin & Jurmo, 1996) were developing worker-centered education programs which focused not only on worker productivity but on broader worker well-being (e.g., economic security, safety, and physical and mental health). Auerbach and Wallerstein (1987) proposed a “problem-posing” approach to workplace basic education (inspired by Brazilian educator Paulo Freire) in which workers identify and analyze workplace issues while building English proficiency. Such an approach was used in a workplace English for Speakers of Other Languages (ESOL) program in California (Añorve, 1989).

In the later 1980s, the Amalgamated Clothing & Textile Workers Union’s education program helped New York City immigrant garment workers develop English skills through discussions, reading, and writing around practical and social aspects of five themes: Transportation, The Immigrant Experience, The Workplace, Housing, and Health and Safety (Amalgamated Clothing & Textile Workers Union, 1988). Workers in an auto factory built basic skills through a whole-language curriculum run by Eastern Michigan University and supported by Ford Motor and the United Auto Workers. Special attention was given to helping learners (who had often worked for years in repetitive jobs in which thinking and control were someone else’s responsibility) to re-think who they are and what they can do (Soifer, Irwin & Young, 1989).

Immigrant garment workers in border communities developed English skills a project operated by El Paso Community College funded by the federal National Workplace Literacy Program. Learners there created videos about broad workplace themes (rather than highly-job-specific job tasks) and worked in teams to find information and make

decisions related to those themes. These abilities were seen as important for workers operating in a Total Quality Management (TQM) environment which emphasizes worker responsiveness to constantly-changing conditions. The transferable knowledge and skills also enabled workers to be flexible and to move to other jobs when current jobs and workplaces disappeared (Jurmo, 1995). Employees in a company-supported education program at Consolidated Edison in New York City developed basic reading and other skills by talking, reading, and writing about thirteen “generative themes” identified by community members.⁶ Teachers adapted the problem-posing methodology of Paulo Freire to have learners use vocabulary related to those themes to develop sub-skills such as breaking down parts and sounds of words, sight word recognition, spelling, punctuation, and grammar (Consolidated Edison Company of New York, 1977; De Leon, 1977).

Other (non-workplace) program models included publicly-funded adult basic education (aka, ABE) programs operated in public schools, developmental education programs in community colleges, and family literacy programs. Examples included an early-1990s shift by Pima County (Arizona) Adult Education to a student empowerment model that helped learners develop basic skills they needed to research community issues and advocate and collaborate for change (Hart, 1998). Shor (1980) described how students in a developmental education program in a New York City community college strengthened their basic skills through “dialogue” and “co-investigation of reality” (p.xxv) to enable them to be “their own agents of social change (and) creators of democratic culture” (p. 48). In a family ESOL program in Boston, learners used language experience activities to write about how they worked with their children in ways that helped both the children and parents improve their English and their abilities to succeed in education. Activities included use of family objects and photos, family trees, and learner-created neighborhood maps (Auerbach, 1992).

Early Supporters of Participatory AFE and Learner Leadership

As the visibility of these participatory practices grew, they attracted financial and in-kind supports from private- and public-sector sources. Here is a sampling of institutions and the supports they provided:

- The Ford Foundation funded a study of U.S. adult literacy programs (Hunter & Harman, 1985) that called for investment in the kinds of community-based programs described above. B. Dalton Bookseller funded the Association for Community Based Education's (ACBE's) 1983 "Adult Literacy: Study of Community Based Literacy Programs" (Business Council for Effective Literacy [BCEL], April 1986). In 1987, the MacArthur Foundation provided \$750,000 for a three-year capacity building project (including creation of information resources and other supports) for adult literacy programs operated by ACBE members (BCEL, April 1987).
- The Pennsylvania Department of Education provided federal 310 Special Experimental Demonstration Project funds to Philadelphia's Lutheran Settlement House (Luttrell, 1982) to create a learner-centered multi-cultural awareness curriculum for its Women's Program. The U.S. Department of Education's Fund for the Improvement of Postsecondary Education supported a Northern Illinois University study of Chicago-based CBO, Universidad Popular (Heaney, 1984).
- In 1982, LVA's National Field Services Committee produced "Student Involvement Guidelines" for programs considering involving learners in the kinds of management activities described above (Literacy Volunteers of America, n.d.).
- The Volunteer Reading Aides program of Lutheran Church Women covered the travel costs of a diverse group of 53 adult learners from across the U.S. to attend the 1984 national conference of Laubach Literacy Action in Washington State. This was the first major effort to involve learners in such a conference. The student involvement activities were planned and

led by a committee with strong representation of students (Lane, 1985).

- In 1985, a group of AFE activists from major U.S. cities created the Urban Literacy Network which served as an independent advocacy coalition for adult literacy. It “represented grassroots and other local literacy efforts at national forums,” “provided a mechanism for learners, providers, and policy makers to . . . learn from each other and define problems which needed attention,” “provided federal legislative and funding information to people in the field who lack the resources to monitor these activities,” “provided information, training, technical assistance and support to urban and state collaborative efforts and local programs representing diverse voices,” and “created a national network of programs and practitioners with shared values” (Literacy Network, November 6, 1991, p.1).

With financing from the federal ACTION agency, the Gannett Foundation, Dayton Hudson Corporation, and B. Dalton Bookseller (with the Minneapolis Foundation as fiscal agent), it created an Urban Literacy Fund to support networking, advocacy, and a grants program. Grants of up to \$40,000 were provided to urban coalitions of literacy programs and community organizations to plan locally-relevant literacy initiatives. The Urban Literacy Network eventually broadened its focus to include state and national coalitions and was renamed “The Literacy Network,” with a tag line of “Supporting Collaborative Efforts for Literacy” (BCEL, April 1987, October 1987, & July 1989).⁷

Its three-day 1989 National Forum on Literacy Collaboration and Policy Issues was organized around three themes: “Seeking Common Ground,” “Collaboration: Why, Who, What, Where and When,” and “Getting Results: Collaboration, Policy, and Advocacy.” One Issue Group presented recommendations related to the “Roles of Adult Learner Leaders.” Participants included representatives of government agencies (including U.S. Senator Paul Simon and Representative Thomas Sawyer), state and community-based adult education providers, and private sector funders. Learners and staff from

Bronx Educational Services presented an evening theater performance (Literacy Network, 1989).

As it neared its end in the early 1990s, the Literacy Network provided moral support, travel funds, and seed funding for the learner leadership efforts (which included creation of the national adult learner organization VALUE) described below under “Mid-1990s into the 2000s: Formalizing Support for a Participatory Approach and Learner Leadership.”

- In its April 1986 *Newsletter for the Business Community* (p.1), the Business Council for Effective Literacy stated that community-based organizations are “. . . the agents most successful in reaching and teaching those most in need of help. . . [They] bring about a larger change within individuals and the greater community. . . A common thread [is] ‘empowerment’. . . to equip individuals [with] more control over their own lives.”
- In 1986, author Sidney Sheldon provided \$10,000 to LVA to support special projects for learners. LVA used \$3000 of that funding to bring students to its 1986 national conference. Some of the funds were combined with a grant from Lutheran Church Women to provide mini-grants to support student-run projects (e.g., student councils, student newsletters, book clubs, a parent-child reading circle) at thirteen LVA affiliates (Jurmo, 1987).
- From the mid- to late-1980s, PLAN (Push Literacy Action Now), a community-based adult literacy program) provided adult literacy services to the Washington, DC community as well as leadership and advocacy at local and national levels. Its nationally-distributed bi-monthly newsletter, *The Ladder*, reported on developments within the field, issued achievement awards for exemplary leadership, featured a “Plain Talk” column by PLAN’s Executive Director Mike Fox in which he sometimes called out bad ideas in the field, and provided opportunities for adult learners to share their perspectives (Fox, 1986).

- In 1987, 1988, and 1989, Lehman College and Literacy Volunteers of New York City hosted “Students & Tutors in Partnership” conferences for adult learners and adult educators. Participants shared ideas for how adult learners could play roles in assessment, recruitment, peer support groups, and other program components.⁸
- For about 14 years starting in 1987, non-profit Literacy South provided various supports to adult literacy programs in southern states that wanted to build their participatory education capacities. These supports included a quarterly *Vision* newsletter that profiled participatory-oriented AFE models in the U.S. South (Literacy South, Spring 1990), collections of adult learner writings (Literacy South, 1990-1999 & January 1992), a writing curriculum guide (King, 2000), and a guide to portfolio assessment (Fingeret, 1993). Its mission statement (Literacy South, n.d.) read:

Literacy South believes that people have the right to read, write and express themselves and to learn in ways that show respect for diversity and honor wisdom, history and culture. We work to support those people and organizations in the South who are committed to a shared discovery of democratic community and personal growth. Through a process of training, consultation, research, organizing, advocacy and publication, we help learners and teachers realize their own power and the power they have to change the world around them (p.2).

We advocate a participatory approach to literacy work from the personal to the policy making level. A participatory approach to literacy respects the experience and skills of everyone involved in creating the program – students, teachers and administrators. Literacy South advocates for practices and policies that support mutual respect, critical analysis and shared decision making in literacy programs (p.10).

- In 1987, non-profit technical support organization World Education created *Focus on Basics*, a magazine highlighting how U.S. adult educators were using participatory practices to help learners deal with health (e.g., HIV/AIDS) and other issues (World Education, Winter 1990). World Education had previously promoted similar practices in non-formal adult education programs in developing countries and was now expanding its scope to U.S. adult literacy efforts (Hunter, Spring 1987).
- In 1988, the New York Times ran a story *New York Times*, September 11, 1988) about how adult literacy students at Bronx Educational Services (BES) served as peer teachers to fellow learners. BES director Jon Deveaux was quoted: "We're based on the premise that since all our students are adults, they can learn from each other. We're looking for discussion and debate, to opening up a panoply of activity, almost like the old open classroom." Karl O. Haigler, the director of President Bush's Adult Literacy initiative said, "The small group approach is gaining ground" and that community-based groups had debunked the myth that one-to-one tutoring is an inherently superior way to teach literacy to adults and that Bronx Educational Services had led the way.

The article explains that BES was expanding the number of instructional hours available to students, to provide more intense practice time for learners. It concluded with another quotation from Jon Deveaux (Office of the Press Secretary, July 19, 1996) who later went on to serve as chair of the Advisory Board at the National Institute for Literacy (described below): "Governments and corporations want miracles, a quick fix. There's no quick fix." BES was among the community-based programs of that time that served as Petri dishes incubating participatory AFE concepts and practices (Gross, 1989).

- In 1989, two undergraduates at the University of North Carolina launched SCALE (Student Coalition for Action in Literacy Education), a national organization that has since then supported involvement of college students in local adult and child literacy efforts. Through an annual national conference and other

- supports to members, and with funding from the MacArthur Foundation and other sources, SCALE (which adopted the motto “Read. Write. Act.” in the early 1990s) promoted a participatory, social-justice approach to literacy education (BCEL, October 1991; Jurmo, September 2003).
- In 1989, *New Directions for Continuing Education* published *Participatory Literacy Education*, “a compilation of articles by researchers and practitioners who presented arguments for, examples of, and recommendations for a participatory approach to AFE (Fingeret & Jurmo, 1989). (LVA’s then-Executive Director referred to this book as her “Bible.”) In one, Lytle, Belzer, Schultz, and Vannozzi (1989) describe learner-centered assessment in which learners serve as “experts about their own learning abilities and interests.” This research at the University of Pennsylvania was part of a larger effort within AFE from the later 1980s through the 1990s to develop alternatives to an over-reliance on standardized tests (Fingeret, 1993; Lytle, Fall 1988; Wrigley, 1992).
 - In 1990, the Center for International Education at the University of Massachusetts at Amherst published *Many Literacies: Modules for Training Adult Beginning Readers and Tutors* (Gillespie, 1990). Written by doctoral student Marilyn Gillespie and based on work in a community-based literacy program in Springfield, Massachusetts it provided “Step-by step guidelines . . . (for) how to build a community of learners, set personal goals for learning and use life experiences to write and publish learner-generated materials.” This was one of several projects (Anzalone & McLaughlin, 1983; Jurmo, 1985 & 1987)⁹ that grew out of a Literacy Committee formed by graduate students at the Center, where graduate students were encouraged to adapt participatory models and take active roles in shaping the content and activities of their studies.
 - In 1992, the ERIC Clearinghouse on Adult, Career, and Vocational Education issued *Adult Literacy Education: Current and Future Directions: An Update* in which Hanna Arlene Fingeret

(1992, p.13) stated that *community-oriented* (in contrast to the more common *individually-oriented*) programs emphasize critical reflection and action related to “community residents’ concerns, such as jobs, housing, childcare, transportation, care for the elderly, and crime.” In participatory activities . . . “students work as partners with literacy workers to . . . [tailor services] to their needs and . . . backgrounds” while supporting learners to also work “with their communities to develop a better quality of life for everyone.” Fingeret noted that “communities” can include “classroom,” “geographical,” or “cultural” communities (p. 13).

- The Center for Literacy Studies (CLS) at the University of Tennessee at Knoxville used participatory research and other learner-centered activities to help learners research and respond to community environmental problems (Merrifield, White, & Bingman, 1994). CLS’ *Getting There* learner-centered employment preparation curriculum (Collette, Woliver, Bingman & Merrifield, 1996) enabled learners to identify their goals and strengths, research job opportunities, identify potential obstacles and how to navigate them, and develop an action plan for moving forward with securing and maintaining a rewarding job.
- The Adult Literacy Resource Institute (ALRI), sponsored by Roxbury Community College and the University of Massachusetts in Boston) provided professional development and other supports for AFE practitioners in the Boston area in the 1980s and 1990s. In collaboration with the Brookline Public Library, ALRI supported several years of adult new writer projects that fostered adult learner leadership. For example, the project leadership team was composed almost entirely of students and selected the name of the quarterly adult literacy journal, *Need I Say More*. This led to an improvisational theater project in which adult new writers scripted and performed original theater pieces.¹⁰
- During the 1980s and 1990s, New York City’s Literacy Assistance Center supported the use of participatory AFE practices in several ways. Examples included hiring an adult learner to serve

on staff, hosting an adult educator study circle on participatory literacy education, and helping adult educators to use participatory practices to help learners develop media literacy and digital literacy skills (Lukes & Fedele, Fall 2002).

- The U.S. Department of Education's National English Literacy Demonstration Program for Adults of Limited English Proficiency funded a two-year research study which produced a handbook (Wrigley & Guth, 1992) that – among other things -- explained the theory and practice of learner-centered ESL education.
- From 1993 to 1998, the Workplace Education Collaborative (WEC, an informal network of workplace literacy educators) organized periodic meetings of adult educators in the northeast who were interested in creating “worker-centered,” participatory workplace basic skills programs. In one example, the New York State Education Department used federal National Workplace Literacy Program funds to operate a three-year statewide “Collaborative Learning for Continuous Improvement” project. Employers worked with adult education programs and -- in some cases -- labor unions to create a “problem-posing” curriculum. Workplace education teams identified workplace problems (e.g., employees unable to fill out reporting forms, understand quality control data, or manage company benefits) and then customized basic skills activities that responded directly to those problems (Jurmo, 1998).

WEC also created and managed the first-ever national listserv for workplace educators (which was also one of the first email discussion lists in the AFE field). Participants shared strategies for working with employers and unions, curriculum development, and advocacy and issued recommendations for improving the National Workplace Literacy Program for the U.S. Department of Education to consider when reauthorizing the Adult Education Act Program (Jurmo et al, 1994; Jurmo, 2001).
- AmeriCorps and VISTA funds were used to pay modest salaries and benefits for some of the learners who took on leadership

roles on the staff of programs that pioneered these ideas (Jurmo, 1987).

The examples of participatory literacy education and learner leadership development described above depended on significant investment of time (often unpaid) and other resources by the program staff, adult learners, and others who did this innovative work.

Despite this interest in and support for participatory practices in general and learner leadership in particular, by the early- to mid-1990s some of the key institutional supporters of a participatory view (e.g., the Association for Community Based Education, the Urban Literacy Network [aka Literacy Network], Literacy South, the original version of World Education's *Focus on Basics* magazine, the Business Council for Effective Literacy) were closing.

At a January 1992 close-out meeting of members of the Literacy Network at the historic Highlander Center in Tennessee, participants agreed that, though this seven-year-old network (described above) of community-based programs was shutting down due to lack of funding, it would nonetheless be important to in some way continue supporting two things: advocacy for social justice-oriented adult basic skills programs and continued growth of "student involvement" through building of a national network by and for what were then called "new readers." This meeting laid the groundwork for two efforts that have continued to this writing: (1) a national on-line discussion group (now called the "AAACE-NLA" group) which has for three decades served as a forum for advocacy-related discussions and (2) a national adult learner leadership organization (initially called "VALUE" and now "VALUEUSA") (Broadway & Levin, 1992).

However, VALUE/VALUEUSA did not happen immediately. First came The Student Gathering, a three-day meeting at Chatham College in Pittsburgh in summer, 1992. Twenty-one adult learners who had been taking on leadership roles in the above-described CBO and volunteer programs convened from around the U.S. With technical support from World Education and expenses covered by a number of individuals and organizations, participants laid out a vision for a new national adult learner organization to be called GATHER: National

Alliance of Adult Learners (GATHER, 1992). While the GATHER meeting's spirit and vision were inspiring, there was inadequate follow-up support for the additional work required to create a national organization at that time. Nonetheless, the idea of learner leadership and participatory/learner-centered literacy education was still alive and some adult learner leadership efforts continued at local, state, and national levels of the CBO and volunteer literacy worlds.

Those CBO and volunteer programs were – by the mid-1990s – beginning to face a new reality that some felt was making it difficult for many of those programs to survive -- let alone support learner leadership activities. The U.S. Department of Education office that provided funding to many CBO and volunteer programs had issued new reporting requirements, referred to as the National Reporting System (NRS). In the latter half of the 1990s, Laubach Literacy saw declines in their program numbers, either through the outright closing of programs or merging of some smaller programs into bigger ones. Laubach and LVA state offices were during this period likewise experiencing funding problems and had to close or rely solely on unpaid volunteer staff. The NRS was seen as the major cause of these program declines as it was becoming too costly for programs who had gotten small amounts of state and federal funding to meet new NRS testing requirements. These requirements especially made it difficult for volunteer programs to serve low-level learners who typically required more time than more-advanced-level learners to show the skill gains that the NRS was looking for.¹¹

For some, these new adult literacy education reporting requirements were a symptom of a larger national shift in thinking about the role of education and social services in the U.S. economy and society as a whole. These observers (Reder, Spring 2020; Yankwitt, Spring 2020) have argued that measuring adult education program effectiveness primarily by standardized test scores, attainment of credentials, and entering employment or further training ignores other important outcomes and the fact that wage growth typically doesn't come quickly and depends on multiple factors, employee skills (though important) being only one of them. Curricula that focus too narrowly on skills presumably needed for specific "work" functions can also undermine the likelihood that learners will continue

to develop their basic skills outside the classroom by applying them in other areas of their lives (e.g., maintaining the health of family members; helping their children succeed in school; managing housing, transportation, and banking tasks; learning about community issues and participating in civic activities).

Mid-1990s into the 2000s: Formalizing Support for a Participatory Approach and Learner Leadership

In the mid-to-later 1990s, efforts to promote a participatory approach and learner leadership got significant boosts from the arrival of three national-level newcomers in the field: the National Institute for Literacy (NIFL), Voice for Adult Literacy United for Education (VALUE, later renamed as "VALUEUSA"), and the National Center for the Study of Adult Learning and Literacy (NCSALL).

National Institute for Literacy (NIFL)

NIFL was established in 1991 by the bipartisan federal National Literacy Act. Its mission was to support the achievement of Goal 6 of the National Education Goals:" ¹²

Goal 6: Adult Literacy and Lifelong Learning

By the year 2000, every adult American will be literate and will possess the knowledge and skills necessary to compete in a global economy and exercise the rights and responsibilities of citizenship.

Objectives of Goal 6

- *Every major American business will be involved in strengthening the connection between education and work.*
- *All workers will have the opportunity to acquire the knowledge and skills, from basic to highly technical, needed to adapt to emerging new technologies, work methods, and markets through public and private educational, vocational, technical, workplace, or other programs.*
- *The number of quality programs, including those at libraries, that are designed to serve more effectively the needs of the*

growing number of part-time and mid-career students will increase substantially.

- *The proportion of qualified students, especially minorities, who enter college, who complete at least two years, and who complete their degree programs will increase substantially.*
- *The proportion of college graduates who demonstrate an advanced ability to think critically, communicate effectively, and solve problems will increase substantially.*
- *Schools, in implementing comprehensive parent involvement programs, will offer more adult literacy, parent training and lifelong learning opportunities to improve the ties between home and school, and enhance parents' work and home lives.¹³*

NIFL would help achieve Goal 6 by providing research and guidance in support of adult education efforts that were spread across multiple federal agencies (Stein, 2000, Chisman & Spangenberg, 2009). Staff and board members included experienced adult education professionals who came from the above-described CBOs which promoted participatory learning and learner leadership. NIFL undertook a number of projects which in various ways supported the growth of both, summarized below:

- Equipped for the Future (EFF) was a multi-year (1994 to 2006), multi-agency (U.S. Departments of Labor, Health and Human Services, and Education) "standards-based system reform" initiative for adult basic skills development in the United States. EFF developed a new, research-informed model of an adult basic skills system that would operate at national, state, and community levels. Drawing on what learners said they need to know and be able to do, EFF researchers identified sixteen basic skills that adults typically need for work, family, and civic roles; developed guidelines for and examples of participatory curriculum (Nash, 1999; Tacoma Community House, 1995) and assessment (King & Bingman, 2004) tools for programs to use; identified supports that policy makers and funders should provide to local basic skills education systems; and developed professional development strategies, pilot projects, and a network of "EFF states" that could be used to develop this EFF

model in ways that were locally relevant (Stein, 2000). This model was built on four “research-to-practice” principles: Skill development should: “be purposeful” (personally meaningful, relevant) to learners; “build on learners’ existing strengths;” “be contextualized” (by focusing on skills as they were actually used in authentic, real-world applications), and use “assessment based on cognitive science” which involves learners in setting personally relevant goals, monitoring progress, and making decisions about how to improve and use what they learn (Bingman & Stein, 2001).

- Annual Literacy Leader Fellowships brought together adult learner leaders and practitioners to conduct personally-developed research projects; build respectful, trusting relationships; and share ideas about how to strengthen AFE. From some of those discussions in 1996 and 1997 emerged a core group interested in creating the kind of national adult learner organization talked about at the above-described Literacy Network and GATHER meetings. These discussions led directly to the creation of “Voice for Adult Literacy United for Education” (“VALUE”) as described below.
- Other research at NIFL supported the creation of collaborative, participatory approaches to workplace and health AFE. Hohn’s NIFL Literacy Leader Fellowship report (Hohn,1997) described an “empowerment health education” effort in Massachusetts that used a participatory action research approach to help adult ESOL learners serve on a “student action health team” that helped community members to understand and deal with locally-relevant public health problems. Sperazi and Jurmo (1994) adapted participatory education concepts to develop a “team” approach to planning and evaluating workplace literacy programs that involved multiple stakeholders (including learners) in setting program goals, carrying out activities, monitoring and continuously improving them, and deciding about possible additional actions to support worker learning and workplace success.

- Direct support for Voice for Adult Literacy United for Education
(See below.)

Voice for Adult Literacy United for Education (VALUE)

VALUE emerged as a new national organization from the above-described early learner leadership efforts of the 1980s and early 1990s and from a year of discussions among NIFL Literacy Leader Fellows in 1996-1997 (Willard, 1998). Three of those Fellows¹⁴ agreed to reach out to others who were already involved in learner leadership efforts to explore how to create a new national organization for adult learners. From summer 1997 to March 1998, they formed an organizing committee of adult learners and adult educators who had already been involved in learner leadership activities. The committee planned and implemented a three-day meeting in April 1998 of 41 learners (from 21 states and the District of Columbia) and practitioners from a dozen organizations. They intentionally held the meeting at the same Highlander Center where the close-out meeting of the Literacy Network (described above) had been held in 1992. Highlander also “was chosen because of its long history as a training center for leaders in the civil rights, labor, and other movements for social justice” (Jurmo, Talan & Shelton, 1998, p. 1).

Participants agreed to form a new non-profit organization called “Voice for Adult Literacy United for Education” (VALUE), set up an eleven-member acting board of adult learners (who roughly reflected the demographic make-up of the U.S. adult learner population) for its first year, agreed to operate as a project within Learning Partnerships (a non-profit that emerged from the 1992 Literacy Network close-out meeting with the mission of supporting participatory adult literacy efforts), and set criteria for membership (i.e., individual learners, learner organizations, and individual and organizational supporters). Board members agreed to stay actively involved in the vital first year of the organization and to communicate via telephone, e-mail, a newsletter, and other channels. Board members divided into committees focused on membership development, communications, program planning, and fundraising.

VALUE’s mission would be . . .

. . . to expand the role of adult learners as leaders . . . to promote the success of literacy throughout the nation. VALUE is a resource for adult learners, literacy practitioners, and policy makers as it strives to heighten public awareness, advocate for effective policies and practice, and promote the understanding that each and every one who wants to improve his/her literacy skills can do so (Jurmo, Talan & Shelton, 1998, p 3).

With technical support from Learning Partnerships (whose director served as a part-time administrator for VALUE for the next two years), a small group of professional advisors, and a part-time accountant, the new board began getting the word out about this new organization via existing networks of CBOs, volunteer programs, and others who had been supporting participatory education in general. They agreed to use the term *adult learner leadership* rather than terms like *student involvement*, to make it clear that VALUE wanted to particularly focus on building the *leadership* capacities that learners could use within and outside their AFE programs, rather than just “get them more involved” in less-focused ways.

Board members agreed that, if they wanted to attract members and support, VALUE had to make a clear case for how learner leadership would help the AFE field. From that point, VALUE more explicitly stated that active learner leadership could strengthen AFE through “the 4 Rs” of:

- Recruitment of new learners;
- Retention of currently-enrolled learners;
- Resource-development (generating of financial and in-kind resources);
- Reform (improving services through learner input into program evaluation, design, and policy).

Within a year (relying largely on telephone conference calls, email, fax, the U.S. Postal Service, office space and equipment donated by the part-time administrator in his house’s basement, and the nonprofit status and a small amount of funding from the remaining budget of the now-closed Literacy Network), the new group had created a simple photocopied newsletter (*VALUE Update*) and a website (with technical

assistance from NIFL) which posted the newsletter, registration information for VALUE conferences, samples of adult learner writing taken from student publications around the U.S., and profiles of adult learner leaders. The board, administrator, and advisors also carried out a strategic planning retreat, raised an additional modest seed grant (from a chance encounter in a shared taxi ride with a Time-Warner representative), and worked with other national, state, and local AFE organizations to plan the first in what would become a series of national “Adult Learner Leadership Institutes” in collaboration with state-level adult basic education and volunteer literacy offices.¹⁵ In its August 2001 *Update* newsletter (Voice for Adult Literacy United for Education, August 2001), VALUE recognized the significant, sustained, and varied support it had received since 1998 from the National Institute for Literacy. Those supports included covering costs of meetings and conference calls, involving VALUE members in the 2000 National Literacy Summit, and providing over \$70,000 to cover costs of the VALUE office.

This initial work was both exciting and challenging, as it required individuals who largely had limited or no experience operating a national non-profit organization to do so through trial and error, creativity, respectful dialogue, and teamwork. Though constantly challenged by limited resources, these early VALUE efforts laid the groundwork of an adult learner board and professional advisors, mission statement, non-profit status, channels for communicating internally and with the public, and a model of a national-level adult learner leadership training that was then taken over by a new president and office administrator¹⁶ (both adult learners) who had come on board by 2001. The organization continually operated through the subsequent two decades, as described under “More Recent Developments” below.

National Center for the Study of Adult Learning and Literacy (NCSALL)

From 1996 to 2007, NCSALL (based at Harvard University and run in collaboration with World Education and other partners) served as the home base for AFE research in the United States (Comings, October 2002). It generated and coordinated many types of research on a range of topics, disseminated it in both “academic” and

“practitioner-oriented” formats, and particularly focused on the learner-centered practices described earlier in this document (including under “National Institute for Literacy,” above). At this writing, NCSALL’s on-line collection (<https://www.ncsall.net/>) includes the 1997-2008 editions of World Education’s *Focus on Basics* journal which allowed researchers and practitioners to make their work – much of it consistent with participatory education and learner leadership (e.g., Hart, 1998; Prevedel, 2003) -- more easily accessible to busy practitioners who might otherwise never read a “research journal article.”

More Recent Developments in the 2000s

Since 2000, efforts to support participatory AFE and adult learner leadership have continued at national, regional, state, and local levels, though largely without the involvement of the individuals and institutions who had supported this work in previous decades. (Many of those individuals have retired or moved on to other lines of work. Many of the institutions closed, often due to lack of funding.) The current state of both participatory AFE and adult learner leadership has been mixed, with some encouraging new models and involvement of new players but with a general lack of awareness of, interest in, and/or use of the significant work and investments (described above) of previous years.

Also occurring in the U.S. in the past two decades – especially since 2015 -- have been four phenomena that have the potential of supporting new, reinvigorated versions of participatory AFE and adult learner leadership as key features of community-oriented AFE systems:

- changing demographics (especially the influx of immigrants whose first language is not English and who are increasing the demand for AFE services) (McHugh & Doxsee, October 2018);
- use of digital technologies for learning, communication, and collaborative work (Bergson-Shilcock, Taylor, & Hodge, February 2023);
- efforts to build social justice and democracy into our social institutions, including AFE (Jurmo, April 2021);

- collaborative, multi-partner planning and implementation of integrated (aka, intersectional, multi-dimensional, multi-partner) systems designed to help community members solve community problems.¹⁷

National-Level Efforts

VALUEUSA

VALUE (which changed its name to VALUEUSA in 2001)¹⁸ has continued to support and provide an independent voice for learner leaders and learner leadership development. For 25 years, it has built on ideas and tools developed in the organization's first few years and added new activities to:

- Conduct eleven national Adult Learner Leadership Institutes (alternating among various states and – every four years – in Washington, DC) and dozens of local-level trainings. (The most recent national Institute was held in Florida before COVID-19 put these events on hold. Fifty adult learners from across the U.S. attended.)
- Organize regular awareness-raising activities – with significant involvement of adult learners -- at the U.S. Congress and Library of Congress and in meetings with the U.S. Secretary of Education and other officials. Some of those events in DC were tied in with the national Adult Learner Leadership Institutes that VALUEUSA strategically scheduled in the Capitol complex every four years. Congressional staffers liked working with VALUEUSA, as they saw it as helping them connect with actual adult learners who – from personal experience -- could communicate about the importance of AFE. These events allowed learners to connect – in catered receptions where a photographer took photos -- with Senators and Representatives.
- Participate on the boards of ProLiteracy and the National Coalition for Literacy (NCL). VALUEUSA's executive director, an adult learner, served as president of the National Coalition for Literacy for two years, as well as vice president for one year and treasurer for two years, an indication of the respect that NCL and

the field placed on adult learner leaders. His leadership helped to stabilize the NCL when its budget, staff, and membership were reduced.)

- Support research (with professional educational researchers) about the impacts of adult learner participation (Patterson & Song, 2018; Patterson, Rasor, & Hunt, August 2020).
- Publish (with ProLiteracy) learner leadership training materials for use by adult educators at local and state levels. (See “ProLiteracy” below.)
- “Cross-fertilize” across many institutions, states, and communities where VALUEUSA provided customized supports (e.g., guidance, training) to learner leaders and programs at local (e.g., New York City’s Adult United Voices) and state levels: Over two decades -- the 1990s and early 2000s -- state-level adult learner leadership initiatives were implemented in about 18 states, including Arizona, California, Delaware, Florida, Georgia, Illinois, Iowa, Kentucky, Maine, Massachusetts, Minnesota, New Mexico, Ohio, Pennsylvania, Rhode Island, Vermont, Washington, and West Virginia. These initiatives took various forms (e.g., formalized adult learner organizations and loose networks of learners from various programs) and were supported by diverse sources (e.g., state adult education offices, a state library, volunteer literacy programs, a state health organization that recognized the importance of serving adult literacy students). Participating learners played a variety of roles, including as advocates for AFE, organizers and facilitators at conferences for learners, and participants in leadership training provided by VALUEUSA.

The sustainability of these adult learner groups varied, depending on availability of funds, how high a value funders and policy makers put on the idea of “learner leadership,” and the availability of student leaders who typically weren’t paid and had other life responsibilities to attend to. VALUEUSA also provided technical guidance to learner leadership efforts in other

countries, including Kenya, which VALUEUSA connected with via Unesco.

During these two decades, VALUEUSA continued to be overseen by a board composed primarily of former adult basic education students now serving in leadership roles within adult education and other fields. Day-to-day operations have been managed by an executive director¹⁹ who is a former adult basic skills student and was involved in many of the above-described learner leadership efforts going back into the 1980s. (He enrolled in a literacy program in Pennsylvania as a young man whose reading abilities were hampered by a learning disability.) As it began its third decade, the organization had raised and managed over \$1 million from large and small donors. In 2021, the Library of Congress – through its Literacy Awards Program -- honored VALUEUSA for its contributions to the AFE field.

VALUEUSA – valiantly -- persevered in this innovative work despite funding that was unpredictable, short-term, and typically not focused on the kinds of services that VALUEUSA provides. VALUEUSA also was especially challenged by having to rely on a board of adult learners who have limited prior experience managing a non-profit organization.²⁰ (Note: As the final editing of this Working Paper was being done on March 21, 2023, an email arrived from VALUEUSA’s long-time director, Marty Finsterbusch, announcing that the 25-year-old organization would close in May 2023 due to lack of funding.)

The Change Agent

The Change Agent was initially launched by World Education in 1988 and then (after a run of a few years) subsequently re-established in 1994 as a low-cost “Adult Education Magazine for Social Justice” for AFE teachers and learners. Each issue has focused on a different theme (e.g., health, work, immigration, the environment) and highlighted participatory practices that programs could use to help learners develop basic skills that they could apply to solve problems for themselves and their communities. Thirty years later, *The Change Agent* continues, now as a biannual on-line magazine that features writings by adult learners and practitioners and “inspires adult educators and learners to make civic participation and social justice

part of their teaching and learning”
(<https://changeagent.nelrc.org/about/>).

Personal & Workplace Success Skills Library

The National College Transition Network (a project of World Education) has created an on-line library of curriculum resources that help learners develop the following ten “Personal and Workplace Success Skills” that they can apply to work-related tasks and in life more generally: “Communication,” “Leadership & initiative,” “Self-Management,” “Navigating and Using Information,” “Critical & Creative Thinking,” “Digital Literacy,” “Teamwork and Collaboration,” “Respecting Differences,” “Adaptability & Flexibility,” and “Emotional Intelligence.” Learners develop these skills through participatory activities such as writing personal stories, setting career goals, and active exploring of and reflecting on potential jobs
(<https://skills.worlded.org/why-personal-and-workplace-success-skills-matter/>).

Teaching Skills That Matter

The “Teaching Skills That Matter (TSTM) in Adult Education” project is a capacity-building initiative of the U.S. Department of Education’s Office of Career, Technical, and Adult Education. Conducted by the American Institutes for Research (AIR), it aims at “improving instruction to build the skills that adult learners need to meet the demands of critical domains of their lives.” Much like the Equipped for the Future Initiative of the National Institute for Literacy of twenty years before (described above), the project was created to “identify, develop, and deploy high-quality, evidence-based materials and training to integrate transferable skills development in the areas of civics education, digital literacy, health literacy, financial literacy, and workforce preparation into adult education and literacy instruction.”

The model is presented in a *TSTM Toolkit* and TSTM Instructional Videos which describe three effective instructional approaches (e.g., project-based learning, problem-based learning, and integrated and contextualized instruction) that can be used to teach nine “skills that matter” (adaptability and willingness to learn, communication, critical

thinking, interpersonal skills, navigating systems, problem solving, processing and analyzing information, respecting differences and diversity, and self-awareness) as they are applied to all of the above five topic areas (e.g., civics education, digital literacy, financial literacy health literacy, and, workforce preparation). The project is providing training, coaching, resources, and peer support (through collaboration within a learning community) to teachers nationwide in the use of this approach, to “have a positive impact on students’ lives and to change the field for the better.”

While all of the units have potential of helping learners to develop the kinds of literacy, academic, and leadership skills described earlier in this document, the “civics education” units have special relevance. For example, the lesson titled “Community Involvement as Social Change” has learners exploring their involvement in their communities and how to “counter intolerance and build cross-cultural understanding,” while developing speaking and listening skills needed for clear communication.²¹ Units on “digital literacy” also show how adults can use digital technologies to solve problems and manage information found in various types of media (<https://lincs.ed.gov/state-resources/federal-initiatives/teaching-skills-matter-adult-education>).

Adult Numeracy Network (ANN)

Since 1994, the Adult Numeracy Network has developed and supported a participatory approach to math instruction for U.S. adults. This approach is based on research in math education for children and adults that is similar to that upon which the Equipped for the Future approach was based. Numeracy educators participating in ANN have over the years communicated via a newsletter, online discussions, workshops, and conferences. The U.S Department of Education’s LINCS currently hosts an AskANN discussion group. <https://adultnumeracynetwork.org> and COABE (See immediately below) features ANN presenters at its annual conferences.

Coalition on Adult Basic Education (COABE)

In 2017, COABE brought a group of adult learners and AFE administrators and teachers to Washington, DC to advocate for adult

education. This experience triggered increased COABE interest in intentionally creating a series of supports for adult learner leadership development. The educators who attended this event had seen the power that student testimonials about the positive impacts of AFE had on policy makers and on learners themselves. COABE's emerging student leadership activities also drew on successful models developed in AFE programs around the U.S.²² COABE has sought to create a learner leadership "system" that includes:²³

- creating a "Students as Leaders Committee" which supports a "Students as Leaders" national initiative. This hybrid -- both in-person and remote -- Student Ambassador Training program was designed to help learners serve as advocates for AFE. It was modelled on similar training developed by Pima College (AZ) Adult Basic Education for College and Career program and had trained 283 adult learners as of September 2022.
- employment-related supports (developed through partnerships with national business leaders) that learners can access through COABE's website. These include:
 - an IBM SkillsBuild program in which pilot sites gave input into developing and field-testing an adult education channel which learners can access for free and which has provided 11,000 badges and credentials to learners.
 - a Google Applied Digital Skills program which helps local adult education programs equip learners to set up Gmail accounts and also learn their way around G Suite.
 - a Google Scholar program which received 672 applications from across the U.S. 200 learners were selected to take self-paced on-line classes to obtain a credential in one of five high need areas with an average wage earning of \$66,000 annually upon completion. This first of its kind pilot program is nearing completion with 27 completing and 58 in process to complete by the end of the 2022.
 - an Amazon "talent pipeline" that helped adult learners find jobs near them that provide a decent wage and benefits. Amazon held a virtual job fair as one component of the COABE 2021 Adult Education and Family Literacy Week,

and also set up numerous in-person job fairs to encourage interest.

- an incentive grant program called “Programs Succeed When Learners Lead” to incentivize local programs with small grants to move learners into leadership positions at their programs.
- a longitudinal Adult Education Alumni Study that will allow learners to document the “return on investment” impacts that adult education has had on them.
- dissemination of information about adult learner leadership research via COABE publications and presentations. This has included an entire strand for adult learners at COABE’s national conference since 2014, multiple webinars annually, workshops at COABE’s national diversity-equity-inclusion symposium, as well as a 2023 edition of the COABE Journal written by and for members focusing on the theme of “Students as Leaders.”
- an annual “Outstanding Adult Learner” award which has since 2010 distributed \$67,000 in cash prizes to winners plus all-expenses-paid trips paid to the COABE conference. These awards began in 2017 with \$1000 in annual prizes. They have increased to up to \$10,000 per year, depending on donations from sponsors.
- raising \$15,000 annually to fund a part-time “Student Coordinator” position at COABE.
- creating a position for an adult learner to serve on the COABE board as “alumni advisor” who has represented COABE to the American Association of Community Colleges, to the press, and on the national stage with legislators (including at the Barbara Bush Foundation Senate Literacy Caucus launch in February 2023).

- creating a student-centered strand at COABE's annual conferences and waiving of registration fees for current learners and recent alumni.
- featuring adult learner success stories as a component of COABE's award-winning "Educate and Elevate" AFE advocacy program.
- featuring one adult learner in COABE's monthly Advocast podcast.
- encouraging teachers to have their learners use the "3-quick-clicks-ignite" software and voter materials as part of their civics curriculum.
- considering creating an Alumni Network for former learners who are successful in their careers who can speak at events and also team with their teachers or program directors to meet with legislators.
- establishing a "Students as Leaders Office Hour" on-line chat service in 2023 in which adult learners and adult educators can interact with COABE and others interested in student leadership.

COABE leadership says that these learner leadership activities have shown that AFE programs should:

- listen to students (And useful things will result – including transformation of programs to new ways of doing things);
- help to open doors for learners (Learner leadership activities are effective ways to do that);
- understand barriers (e.g., stigma) that can hinder learner leadership development;
- generate and reserve funds for learner leadership activities (e.g., paying for a student coordinator position, trips to visit legislators, etc.);

- consider using the Student Ambassador Training as a first step in building interest and expertise for learner leadership within a program;
- document the impacts of AFE and learner leadership activities on learners;
- develop “champions” for learner leadership at all levels, to expand supports for learner leadership beyond what national-level organizations are already doing and to make learner leadership a core feature of AFE efforts at all levels;
- use mass marketing to inform the public (including potential adult learners) about the potential of AFE.

ProLiteracy

Following in the pioneering footsteps of Laubach Literacy Action and Literacy Volunteers of America, ProLiteracy has continued supporting the concept of learner leadership. Recent activities include:

- providing VALUEUSA with technical support to conduct on-line training for learner leaders as an alternative to VALUEUSA’s usual national Adult Learner Leadership Institutes (Normal face-to-face institutes were not possible due to COVID restrictions. This online training was done in 2021 with the National Coalition for Literacy.)
- featuring writers (in ProLiteracy’s research publications) who in various ways document and support participatory learning and student leadership.
- publishing a VALUEUSA guide for an 8-hour training that shows adult educators how to develop student leadership through project-based learning. This guide grew out of leadership trainings that VALUEUSA had provided to staff and learners in programs around the United States. In that training, participants learned how to identify a problem within the

program and then plan and implement a learner-led project to resolve that problem. In the process, learners both strengthened the program while also developing leadership-related skills they could carry over to their lives outside the program.

For example, in one site in Colorado, learners identified a problem: long waiting lists due to an insufficient supply of tutors. Using supplies donated by local merchants, the learners planned and implemented a tutor recruitment project which used a community barbecue as a vehicle for both recruiting tutors and raising public awareness for the program. In a second program (also in Colorado), learners felt that they were not accepted in the community because they were “foreigners.” To build community awareness of and support for both learners and their program, the learners and staff created a widely-circulated and popular booklet containing learner-written stories in which learners described the positive impacts that their adult education programs had had on their lives. In a housing project in Florida, learners raised funds and awareness for their program by organizing a garage sale with items donated by learners and other community members.

Barbara Bush Foundation for Family Literacy (BBFFL)

In its *National Action Plan (NAP) for Adult Literacy 2021*, the Barbara Bush Foundation for Family Literacy (October, 2021) identified (a) “Engage adult learners as movement leaders” as one of five proposed national initiatives and (b) “Fund and launch an Adult Learner Leadership fellowship program” as a related action. In early 2022, BBFFL created an ALL IN (Adult Literacy and Learning Impact Network) Coordinating Council composed of representatives of national AFE organizations. ALL IN’s mission is to do the more-detailed planning and other work required to carry out the learner leadership and other initiatives proposed in the NAP. In the remainder of 2022, ALL IN began clarifying priorities and otherwise getting itself organized, to begin its work in early 2023.

In April 2022, the Dollar General Foundation issued a \$1.6 million grant to BBF to support implementation of the NAP. This is in

addition to a \$200,000 grant to BFF by the Ford Foundation in October 2020. (As noted earlier in this document, the Ford Foundation played a major role in the adult literacy field in the late 1970s and early 1980s when it funded “Adult Illiteracy in the United States” a 1985 study by Carman St. John Hunter and David Harman of World Education that provided key information and recommendations that contributed to the subsequent explosion of national support for adult literacy education in the 1980s. The report emphasized the need to support the kinds of participatory education provided by community-based organizations to help communities deal with locally-relevant concerns.)²⁴

National Centers for Family Learning (NCFL)

NCFL has published documents that show how family literacy programs can help parents engage actively and effectively in the improvement of their children’s schools (Levesque & McGregor, n.d.) and communities (National Center for Families Learning, n.d.).

American Library Association

With support from the Institute of Museum and Library Services, in 2020 the American Library Association issued *Media Literacy in the Library: A Guide for Library Practitioners* (American Library Association, 2020). Though not focusing solely on serving adults who have basic skills limitations, this guide can be useful for AFE practitioners. It describes why library users need media literacy and how library staff can support media literacy in their communities. (See other references to “media literacy” under “Teaching Skills that Matter” above and in the profile of the New York City Literacy Assistance Center under “Mid-1980s to Mid-1990s: Grassroots Growth of a Participatory Approach”). It is also an example of the foundational skills-related work that the American Library Association and public libraries have done for decades (<https://www.ala.org/advocacy/literacy>).

Professional Development Opportunities for Adult Educators

Professional development activities (e.g., webinars, conferences, discussion groups, podcasts) carried out by the above organizations and others frequently feature training related to various features

(“student-centered” or “learner-centered” instruction; “project-based learning;” “equity, inclusion, and social justice”) of participatory AFE. Examples include:

- The Literacy Information and Communication System (LINCS) is a national leadership initiative of the U.S. Department of Education, Office of Career, Technical, and Adult Education (OCTAE). It serves as an on-line resource center for AFE, offering discussion groups, courses, and resource collections related to key topics in AFE. In early 2023, LINCS discussion group topics included:
 - A February 2023 discussion of “U.S. Citizenship and Civics Resources for Black History Month;”
 - A January 2023 discussion on “Trauma-Informed Care and Social Emotional Learning;”
 - A January 2023 discussion on “Undoing Shame in the Adult Education Classroom;”
 - A January 2023 discussion of “The Color of Education” focusing on diversity, equity, and inclusion in correctional education. (<https://lincs.ed.gov>)
- The Critical Teaching and Learning Forum presents resources (including curricula and a podcast) related to “critical pedagogy and related issues in a variety of contexts” (<https://criticalteachingandlearningforum.org>)

State- and Local-Level Efforts

AFE advocates at state and local levels have continued adapting the kinds of learner leadership and participatory education practices developed in earlier decades. Here are some examples:

- From 2002 to 2005, the Grassroots Literacy Coalition (a collaboration of adult learners and educators in New York City) prepared position papers and a learner leadership handbook, organized a series of advocacy events (at City Hall and other venues), and conducted advocacy and leadership training in space donated by New York University (Jurmo, 2005).

- When lower Manhattan was closed down after the attacks of September 11, 2001, the Consortium for Worker Education (CWE, a partnership of 30-some labor unions in New York City) quickly created a workforce development/education initiative for the many workers who had suddenly lost their jobs. One of the education programs was a computer-skills/ESOL/job placement program for garment industry workers, most of whom were Asian immigrant women. CWE staff adapted the Equipped for the Future model to create participatory activities (e.g., role plays, games, stories written by learners around photos of events and people taken by the learners) that helped participants develop particular kinds of strategies and related oral English skills that they could adapt for many types of work situations (e.g., greetings and personal introductions, dealing with health and safety issues, identifying and locating objects, giving and getting directions to and from locations) (Jurmo & Love, March 2003) and for finding and attaining a rewarding job (Jurmo, November 2002).
- After stepping down as founding president of VALUE in the late 1990s, Archie Willard increasingly became an active advocate for health literacy efforts in the U.S. He advised health literacy educators in his home state of Iowa and elsewhere on how to ensure that health education programs were relevant and effective for basic-skills-challenged adults. He spoke on this issue in forums across the country²⁵ (Osborne, 2019).
- The Writing Program of New York University's Gallatin School of Individualized Study has – for two decades – published an annual *Literacy Review* collection of writing by learners in NY City AFE programs, hosted an annual event in which those writers read from their writings, and run a daylong workshop for adult educators on learner-centered approaches to teaching writing to adults. (Visit <https://sites.gallatin.nyu.edu/literacyreview/> and <https://sites.gallatin.nyu.edu/literacyreview/past-volumes/> .) The Gallatin School has also, since 2001, offered a "*Literacy in Action*" course which has helped undergraduates learn about

various approaches to the adult literacy issue through volunteer work at local AFE programs, readings, class discussions, and research.

- In the 1990s through about 2015, the Council for Advancement of Adult Literacy and the National Commission on Adult Literacy (successors to the Business Council for Effective Literacy of the 1980s and early 1990s) issued dozens of documents that called for AFE systems that responded to both workforce and other learning needs of diverse groups of adult learners. One of those documents (Jurmo, 2002) focused on the fundamental need for leadership as a focus of and outcome of AFE efforts.
- A 2004 Rutgers University guide adapted the above-described Equipped for the Future model and other research to show how one-stop career centers can more effectively understand and respond to the needs of job seekers who have various kinds of basic skills limitations (John J. Heldrich Center for Workforce Development, 2004).
- In 2009, non-credit staff at Union County College in New Jersey developed an EFF-influenced learner-centered, participatory approach to incorporating common computer applications (e.g., e-mail, PowerPoint, web browsing) into basic skills education for several adult learner populations (Jurmo & Panesso, 2009). Examples included an “ESL for Healthcare Workers” course (Jurmo, December 2009), a work-readiness program for recently-released inmates (Jurmo, Waters, & Cruz, 2009), and career planning and work readiness courses for workers in the transportation/logistics/distribution industry (Jurmo & Syed, 2009). Participants used computers to better understand job-related options and challenges, develop career-related plans and skills, and make PowerPoint presentations about what they had learned.
- Environmental organizations have worked with AFE programs to provide participatory service-learning opportunities that help learners understand environmental issues and develop basic

- skills and technical skills through environmental projects (e.g., community gardens) (Jurmo, 2019a).
- In correctional education programs, inmates earn college degrees through participatory research, public speaking, writing, peer-support, and life-planning activities (Jurmo, December 2018; PBS Learning Media, 2019).
 - Health service providers collaborate with AFE programs to enable learners to understand and respond to health issues impacting themselves, their families, and communities while also developing foundational skills (Jurmo, 2019b; Literacy Assistance Center, 2004).
 - Participatory practices were incorporated into curricula used in a civil service test preparation program for subway and bus workers by Transport Workers Union Local 100 in collaboration with the New York Metropolitan Transit Authority in 2004-2005. With support from participatory-oriented adult educators, participants worked in teams, sharing test-taking strategies, and using technical manuals to develop their background knowledge (about the requirements of particular jobs) and their ability to quickly read and respond to written test questions related to information found in the manuals (Jurmo, March 2021).
 - Make the Road New Jersey, an immigrant worker rights organization, integrates learning about various worker rights issues (e.g., combatting wage theft, immigration reform, the impact of the COVID-19 pandemic, access to driver's license) into ESOL classes it provides to immigrant workers (<https://maketheroadnj.org/about-us-2/>).
 - WE LEARN (Women Expanding Literacy Education Action Resource Network) is a "community promoting women's literacy as a tool that fosters empowerment and equity for women." Writing program students and staff publish "Women's Perspectives: A Journal of Writing and Art by Adult Learners" (<https://www.welearnwomen.org>)

- The website of the Virginia Adult Learning Resource Center at Virginia Commonwealth University includes a *Spotlight* annual anthology of adult learner writings and a *Voices from the Field* podcast collection which includes profiles of adult learners (<https://valrc.org>).
- New York City Literacy Assistance Center has, since its founding in the mid-1980s, been a leader in promoting participatory approaches to AFE (Grant, November 2005; Greene, D., December 2006; Literacy Assistance Center, Summer 1997). It currently is leading a Literacy and Justice Initiative to build collaborations between AFE programs and other organizations that support social justice (Literacy Assistance Center, 2020).

Part 2

Benefits and Challenges

Though more-detailed research is needed to clarify the extent, strengths, and limitations of participatory programs and learner leadership activities within AFE, summarized below are broad categories of potential benefits and challenges of these inter-related models. These potential strengths and limitations emerged from the author's review of documents, recent communications with individuals who have done this work, and his own experience working in, reflecting on, and reporting on dozens of the initiatives described in Part 1. Those interested in supporting participatory education and learner leadership are urged to re-think (a) the various types of benefits that such efforts can have for learners, the AFE field, and other stakeholders and (b) the factors (challenges, obstacles) that can undermine the effectiveness of participatory activities that support the leadership capacities of adult learners.²⁶

Potential Benefits

For Learners

By actively involving learners in instructional and management roles, participatory-oriented programs can help learners more effectively develop strengths they need to serve as *leaders* (collaborative problem solvers) in personally-relevant work, family, civic, and lifelong learning roles. Those strengths include foundational skills, related background knowledge and skills, social-emotional abilities, credentials, personal plans, and support systems.

For Learners' Families and Community Stakeholders

By extension, better-equipped learner leaders can help to improve the functioning of their families and the diverse "communities" (e.g., workplaces, democratic institutions, K-12 schools, healthcare services, public safety systems, etc.) they interact with. Learner leaders can also help increase the awareness within families and communities of the value of education in general and of

AFE in particular, and of how to become active users and supporters of AFE.

For AFE Providers

Participatory AFE and learner leadership efforts have produced evidence about learner needs and strengths and instructional and management strategies (e.g., for needs assessment, curriculum development, professional development, advocacy, recruitment) that adult educators can use to better serve learners. Such efforts have also generated experienced professionals and other partners, cross-program collaborations, and public awareness and funding that have helped – and can help -- the AFE field better attract, retain, and support adults who have foundational skills limitations (Jurmo & Mortrude, September 2020; Jurmo, April 2021).

For AFE Policy Makers and Funders

Participatory AFE and learner leadership efforts have raised the visibility and understanding of AFE as a valuable social and economic resource that deserves support of public and private funders. Such efforts also demonstrate to policy makers and funders where to target resources.

For Other Stakeholders

Other stakeholders (e.g., healthcare providers, workforce centers, employers, prisoner re-entry organizations) work with AFE programs to strengthen the workforce, support public safety and public health, support inter-generational literacy, and meet other social and economic goals. Through leadership development activities jointly run with AFE programs, those other stakeholders can help adult learners be better equipped to deal with the issues that these stakeholders care about. Such activities also can help stakeholders improve their community relations and get access to potential customers and workers from within adult learner communities.

Potential Challenges

AFE and adult learners operate within larger social, economic, and political contexts that historically have provided them with some

supports (e.g., funding for AFE services and access to employment and other supports for learners). But both adult learners and AFE providers also face many challenges. Broadly speaking, basic-skills-challenged adult learners have historically had to deal with limited education, employment and income, health, transportation, housing, and other determinants of well-being. The AFE programs that try to serve them have similarly had limited financial and in-kind supports from public and private-sector funders and other stakeholders.

With such limited supports for both AFE learners and providers, it is not surprising that the quantity and quality of AFE services in general – and of adult learner leadership efforts in particular -- are limited. Put another way: AFE faces a “double whammy:” On one hand, it tries to serve basic-skills-challenged adults who – though they can have considerable personal strengths -- often have to also deal with both the above-described practical considerations as well as social-emotional issues (e.g., lack of self-efficacy belief vis-à-vis lifelong learning, stigma that pigeonholes them into marginalized status) that effectively make them “hard to serve.” On the other hand, AFE programs are expected to do this challenging work without the research, professional development, partnerships, and sustained funding they need to provide quality services to the large and diverse populations of learners who might benefit from them.

Within such constraints, efforts to support learner leadership are also hampered by:

- Overall: A lack of an evidence-informed vision for (a) a more effective, integrated system of AFE and other supports that serve more learners and their multiple needs and (b) how learner leadership can contribute to and result from such a system.
- More-specific challenges
 - An assumption that AFE should focus primarily on helping learners improve their employment status and that learner leadership is not particularly relevant to employment-related goals.

- A tendency to focus learner leadership efforts primarily or solely on helping learners to serve as advocates (spokespersons, fundraisers, “cheerleaders”) for AFE rather than consider the broader range of ways that learners can serve collaborative, problem-solving roles within and outside AFE.

Just as “being religious” should mean more than going to a designated house of worship on an appointed day and “being patriotic” should be more than wearing a flag pin or displaying a flag on a small number of days each year, learner leadership should be more than assigning selected learners to representational roles that can too often be more symbolic than substantive. Rather, learner leadership development should be seen in a new way, as helping learners move to higher levels of control, responsibility, and reward vis-a-vis their learning and other areas of their lives important to them.

- A lack of awareness (historical memory) and use of the significant lessons learned in past learner leadership efforts. This lack of awareness is due to a number of factors, including the retiring of those involved in prior efforts, a lack of family-sustaining career opportunities for adult educators (which contributes to professionals leaving the field), and/or closing of service providers and umbrella agencies that previously did this work. Many adult educators have never themselves experienced anything like “participatory education” and therefore have limited understanding of how it works and its potential benefits. There is also a lack of a user-friendly on-line archive where those wanting to learn from past experiences can access relevant resources. With such a limited understanding of the why’s and how’s of “learner leadership,” busy and often-over-extended adult educators might naturally see learner leadership as a bit of a mystery and/or as a nice “add on” but not a core, essential feature and outcome of AFE.

- Learners who might be interested in taking on more active leadership roles in AFE typically having to prioritize other personal goals and responsibilities, making participation in those roles – or AFE more generally – difficult or impossible.
- A tendency (understandable though it might be) of AFE programs and supporters to chase after funding and/or the latest “shiny object” (e.g., the promise of digital technologies) without ensuring that such resources in fact support effective learning and other important learner goals.
- An over-reliance on “feeling good” as an indicator of learner leadership effort success rather than focusing on more-substantive benefits for learners and AFE. This can be due to the lack of professional development given to both learners and practitioners about the why’s and how’s of adult learner leadership development. It can also be due to the lingering tendency within the United States to underestimate the potential and importance of individuals and communities who are disproportionately impacted by basic skills limitations and to view adult learners in a paternalistic, patronizing way (e.g., as empty vessels who need to be filled with knowledge supplied by others).
- A lack of sensitivity to the facts that poorly-planned and -supported learner leadership efforts can put learners at risk of embarrassment, confusion, failure, and/or discouragement. This points to the need to help learners develop both the *technical* (e.g., public speaking, note-taking, reading of reports of meetings, facilitation) skills and the *social-emotional* strengths (e.g., self-efficacy, patience, listening) they might need in the leadership roles they are taking on. Supporters of learner leadership, in turn, also need to develop their own capacities to provide appropriate supports to learner leaders (e.g., appropriate leadership training and coaching/mentoring, uses of clear language in written and oral communications, paid positions, funding for travel and

other expenses, access to digital technologies, help with life issues).

- A tendency to neglect the leadership development needs of AFE practitioners and other stakeholders when designing and implementing leadership development for learners.
- Bureaucratic turf and individual egos as drivers of decisions about learner leadership. (The collaborative approach taken by VALUE and other organizations in the 1980s and 1990s is an alternative to unproductive, turfism, ego, and lack of solidarity.)
- A dogmatic reliance on the false dichotomy that AFE is either (a) a workforce preparation program (that too often ignores the lack of family-sustaining career opportunities or other problems that American workers can face [e.g., poor working conditions, lack of benefits]) or (b) a learner-centered education program that equips learners to deal with social justice and other issues (not limited to “getting a job”) they encounter in life.
- Limited involvement in AFE and learner leadership efforts of communities and other important stakeholders who could both contribute expertise, energy, meaning, and other resources—including learners -- to these efforts and benefit from them. Though for decades there have been attempts to broaden the AFE workforce beyond a heavy reliance on white women, diversifying the ranks of those who do this work has remained a challenge. Some attribute this to the fact that individuals from historically-economically-marginalized communities don’t have the economic security and support systems that would allow them to take the type of low-paid, part-time jobs and unpaid volunteerism that AFE tends to offer.

Part 3

Actions to Renew U.S. Adult Foundational Education

The preceding sections argue that:

- The AFE field can benefit from valuable previously-developed resources related to participatory AFE and learner leadership. These resources include program models, curricula, networks, experienced practitioners and learner leaders, professional development opportunities, and funding sources.
- Many individuals and organizations in the AFE field continue to -- in various ways -- develop such resources and are motivated to work with others doing similar work – if adequate supports for that work are available.

We now come to the question of:

What might be done to incorporate participatory education and adult learner leadership resources into an effort to strengthen and expand AFE services in the U.S.?

Presented below are broad recommendations for adult educators, adult learners, and other stakeholders – both experienced stakeholders and relative novices -- who might now want to:

- strengthen and expand AFE services in the United States;
- incorporate participatory education principles and practices into AFE services; and
- make adult learner leadership development an explicit purpose and key feature of new AFE systems.

In addition to these more-broadly-relevant recommendations, more-specific actions are proposed that focus on particular learner leadership strategies that might be carried out by . . .

- supporters of AFE (e.g., policy makers, funders, and other stakeholders who might partner with AFE programs);
- community-level implementers of AFE services (e.g., AFE service providers, adult learners from various backgrounds, and other stakeholder partners).

These recommendations are based on the belief that:

- Learner leadership development should not be seen as something that stands alone from AFE efforts as a whole nor from the participatory approach that was at the root of adult learner leadership efforts.
- Instead, learner leadership development should be re-conceived and supported as a central purpose and feature of renewed, community-oriented AFE systems in the United States.
- Strengthening adult learner leadership – and strengthening the field more generally -- must be done systematically, strategically, collaboratively, and in informed ways (e.g., based on an understanding of what has worked and what hasn't worked in previous AFE and learner leadership efforts). Such an informed, principled, collaborative, problem-solving approach is more likely to have significant, sustained impacts on wider ranges of learners and communities. Superficial or poorly-planned and -supported "learner leadership" can either not have lasting impact or could produce more harm than good.²⁷

The remainder of this Part 3 is an abbreviated, introductory version of more-detailed recommendations for three audiences -- the AFE "Field as a Whole," "Supporters of AFE and Community-Oriented Leadership Development," and "Community-Level Implementers" -- that can be found in Appendices A, B, and C. Readers are encouraged to use the detailed versions of these recommendations (which include links to additional useful resources) to guide further planning and action on participatory education, learner leadership, and AFE system reform.

Actions for the Field as a Whole: Develop a New Vision for Community-Oriented AFE with Participatory Learning and Learner Leadership Development as Key Components

Those who believe in AFE’s potential benefits for U.S. adults and out-of-school youth and the families and community institutions they are part of should now take a hard look at the why’s and how’s of U.S. adult foundational education. They should do so humbly (with open minds, in the spirit of continuous improvement), collaboratively, and recognizing that:

- U.S. adult foundational education:
 - reaches only a small percentage (less than 10 percent) of the millions of U.S adults who have foundational-skills-related challenges (National Coalition for Literacy, 2021);
 - has in recent years shown it can be resilient in responding to major challenges (e.g., declines in enrollments due to COVID-19) and opportunities (e.g., increased use of digital technologies to create learning opportunities for learners and professional development and other opportunities for AFE staff) (Belzer, Leon, Patterson, Salas-Isnardi, Vanek & Webb, August 2022);
 - does this demanding work with meager and unreliable funding, fewer AFE programs, and without easy access to the lessons learned in many past initiatives that were supported by a wide range of public and private sources (Adult Foundational Education Digital Library Group, 2023; Comings, Reder & Rosen, 2021).

- Other important stakeholders (e.g., employers, labor unions, and workforce and economic development agencies; public health agencies; providers of services to diverse learner populations such as immigrants and refugees, formerly and currently incarcerated individuals, people with disabilities) continue to see the importance of adult foundational skills for the people they serve and rely on. These potential partners could benefit from better-organized collaborations with the AFE field, but are largely under-involved in AFE efforts in substantive

ways. These stakeholders often are engaged in efforts (e.g., community renewal and equitable economic development, public health, environmental sustainability, public safety, parent engagement in their children's schools, and other social-justice-related work) that parallel or overlap with the AFE field and the populations that AFE serves. These potential partners have positive motivation, expertise, and financial and in-kind resources that they could bring to collaborations with AFE (Jurmo, Montalto & Rosen, 2019; National Center for Families Learning, n.d.)

- The AFE field has – over decades – developed models of participatory, contextualized education and of partnerships with diverse stakeholders. These models can now inform innovative AFE efforts to provide more learners and stakeholders with high quality services.
- Many advocates for AFE are searching for new ways to provide high quality services that respond to the economic, social, health, and other realities of learners and of their families and communities (Jurmo, April 2021; Levesque & McGregor, n.d.; McHugh & Doxsee, October 2018; Mortrude, Spring 2020; Reder, Spring 2020; Uvin et al, 2020; Yankwitt, Spring 2020). Many are also concerned that, though federal policy (which is a key funder and shaper of AFE) might have been well-intended in shifting toward the current focus on employment-related outcomes, such policy is often perceived as overlooking other important learner interests and forcing programs to respond to irrelevant and unrealistic performance goals. When advocates raise these concerns, they often get the message that federal policy isn't going to change from its current goals and performance measures anytime soon -- especially in a period when bipartisan cooperation seems like a quaint idea from another time.

Those looking for new ways to build AFE systems that have learner empowerment as a central purpose and feature should:

1. Through study, reflection, and dialogue, learn from and adapt past and emerging models for . . .
 - Adult foundational education including:
 - the participatory education and learner leadership models described in Parts 1 and 2 of this document;
 - specific models of AFE system reform, including:
 - the Equipped for the Future (EFF) “system-reform initiative” model;
 - “community-oriented” adult education;
 - multi-purpose AFE customized to particular learners and contexts;
 - “lifelong and life-wide learning.”
 - System reform developed in other fields such as:
 - Collective Impact;
 - customer-oriented governmental and non-governmental organizational development;
 - integrated workforce development systems;
 - efforts to re-build communities and improve public health in the wake of COVID-19 and over-reliance on isolating and divisive social media;
 - “place-based” economic development.
2. Develop a two-part “vision” that clarifies why and how participatory education and adult learner leadership can help build more effective, multi-purpose, community-oriented AFE systems.

Borrowing a concept developed in the 1970s through the 1990s, an updated *community-oriented* approach to AFE would focus on helping learners – as individuals and collectively – be able to better understand, respond to, and shape social and other conditions (challenges and opportunities) they encounter in the roles they play in work, family, community, and lifelong learning “communities” (social contexts). Community-oriented AFE – often with other partners such as employers, labor unions, public health organizations, and others -- would provide

educational and other supports that learners need to successfully perform those roles.

This dual vision could be created in two steps:

Vision Step 1: Develop a new vision for an alternative, participatory, community-oriented AFE system that has necessary supports to exist alongside –and, where appropriate, integrated with current models -- to expand the range of AFE services for a greater variety of learners (many of whom might not see "getting a better job" as their priority concern). Such an approach might have these characteristics:

- A more customized focus on the diverse populations of potential adult learners and outcomes that are relevant to work, family, civic, and lifelong learning roles those learners do and might play. Relevant outcomes for these learners could include improved learner abilities to manage such “life-wide” issues as:
 - their health and that of their families;
 - personal and family financial and in-kind resources;
 - digital technologies;
 - legal issues;
 - housing and transportation;
 - integration with and civic engagement in their communities;
 - transition to retirement;
 - other meaningful personal, family, and civic responsibilities.

- A more holistic understanding that such a mix of learning goals is not necessarily contrary to employment-oriented education . Rather, multi-purpose AFE systems might be seen as expanding workers’ ability to manage the life issues that workers need to attain, perform, retain, advance in, and be responsibly rewarded for employment.

- A greater emphasis on and support for well-planned and -supported collaborations between AFE providers and other important community stakeholders.
- Use of evidence-informed learning and assessment strategies customized to the learners involved.
- Use of evidence-informed strategies for vital management tasks such as assessment of needs of learners and other community stakeholders, setting goals, continuous improvement, professional development for AFE practitioners, creating partnerships, fund development, learner recruitment and retention, and facilities management.
- Effective uses of policy and funding – and digital technologies -- to support the above work (e.g., through pilot projects focused on local needs and opportunities).

Vision Step 2: Develop a new vision for what learner leadership is, why developing it is important and how it can contribute to and result from the above-described more comprehensive, community-oriented model of AFE. The wording of such a two-part strategic vision might be along these lines:

Community-oriented adult foundational education (AFE) can contribute to the creation of an economy and society that are healthy, productive, environmentally sustainable, safe, and equitable. It can do so by helping adults and out-of-school youth develop the foundational skills and other tools (e.g., background knowledge, educational and occupational credentials, support systems, personal plans, and social-emotional strengths) they need to proactively serve as effective leaders (aka, collaborative problem-solvers) in personally-relevant and -rewarding work, family, civic, and lifelong learning roles.

Helping adult learners become more effective leaders can not only help learners as individuals but enable the social partners they interact with -- their families, communities, workplaces, and adult education programs --

operate more effectively. Learner leadership development should thus not be seen as an "add-on" but as a core purpose of AFE and integrated – in meaningful, user-friendly, respectful, and well-planned and -supported ways – into all aspects of AFE efforts.

Or as a New York City adult learner leader put it (Literacy South, n.d., p. 10):

Students need to be real leaders, not tokens . . . How can we get students to become real leaders? . . . I'm tired of telling my life story – I graduated from that. It's time to talk about other things. Teach us to become leaders.

Actions for Supporters of Community-Oriented AFE and Leadership Development: Develop Strategies and Resources to Support New Community-Oriented AFE Systems with Participatory Learning and Leadership Development as Key Components

National AFE organizations, public- and private-sector funders, researchers, state and local AFE resource centers, and other stakeholders who have already supported adult learner leadership development can now bring their expertise and resources to new learner leadership efforts. They should consider how they can work with each other -- and possibly with other stakeholders who are new to AFE and this idea of learner leadership -- to strengthen and expand it as a resource for and outcome of AFE. In Adult Learner Leadership Task Forces, supporters can:

1. Begin by creating their own version of the above-described evidence-informed vision that is relevant to the communities they support. The vision would outline (a) a more effective, community-oriented system of AFE and other supports that serve more learners and their diverse needs and (b) how learner leadership can contribute to and result from such a system.
2. Develop and share resources that stakeholders can use to make that dual vision real, including:

- A plan that shows potential benefits and types of learner leadership activities and supports they need.
 - Capacity-building opportunities for adult educators, learners, and other stakeholders doing this work including:
 - training, transferable certification, mentoring, and on-the-job learning;
 - an on-line resource collection;
 - family-sustaining professional positions and internships/fellowships/apprenticeships;
 - special efforts to bring in and support individuals who can contribute useful technical and cultural knowledge, empathy, energy, creativity, and other strengths to the pool of individuals doing this work.
 - other practical supports for learners, including universal use of clear language, transportation and other expense, and access to digital technologies.
 - New research on questions relevant to emerging learner leadership efforts.
 - Coordinated pilot projects.
 - Networks of those supporting and doing this work.
3. Monitor and learn from how the above opportunities are used.
 4. Update policy and funding guidelines to support new, community-oriented AFE systems.
 5. Secure financial and in-kind resources to support effective learner leadership efforts – at both “macro” and community levels --through seed funding, pilot projects, sustained operating costs, and building of partnerships with community stakeholders.

Actions for Community-Level Implementers: Plan, Implement, Improve, and Expand Community-Oriented AFE Systems with Participatory Learning and Leadership Development as Key Components.

Individuals and institutions considering getting involved in implementing one or more forms of participatory AFE and adult learner leadership development at the local level might:

- review the above-described recommendations for “The Field as a Whole” and “Supporters of AFE and Community-Oriented Leadership Development” to identify ideas they might adapt for efforts in their communities;
- focus on creating and supporting learner leadership activities that are customized to local needs and capacities;
- create an Adult Learner Leadership Task Force that explores, plans, generates resources for, implements, monitors, and learns from those activities;
- adapt the following multi-phase process:

Phase I: Identify why you are interested in “learner leadership” and learn what others have already done.

- A. Clarify for yourself: Why might you consider getting involved in “learner leadership”?
- B. Learn what others have already done to develop the leadership capacities of adult learners.

Phase II: Clarify how a learner leadership project might be helpful to your institution or community.

- A. Using the examples of learner leadership activities described earlier in this document as a framework, discuss:
 1. Has your program already supported leadership roles for learners? If so, what happened? Should these existing roles be further strengthened and expanded? If not, why not?
 2. Should you now consider introducing new learner leadership activities? If so, . . .

- Which type of activities?
- What are the potential benefits – and for whom?
What potential challenges might you face?
- What human and material resources will you need?

B. Develop a brief concept paper that describes . . .

1. What you've learned so far.
2. Pilot projects you'd like to implement.
3. A plan for each proposed pilot project. (You might adapt the project-based-learning type of leadership training developed by VALUEUSA. COABE also has an introductory "Ambassador" training program designed to prepare participants for subsequent additional leadership activities.)
4. Guidelines (principles) you will try to follow in your learner leadership work.

Phase III: Generate the resources you'll need for a pilot project.

Working with individuals within your organization and possibly outside it, identify and reach out to sources who might provide financial and/or in-kind supports for your proposed project. Present a clear, concise version of your proposal to them. You might "start small" (with a modest pilot project that isn't overly complicated and doesn't require major investments) and seek seed funding that will allow you to get the project up and running. Focus on producing useful results and lessons learned that you can build on in subsequent projects. Reach out to potential supporters who already are involved in the kinds of activities you hope to carry out.

Phase IV: Plan, implement, and learn from a pilot project.

With resources secured, do the detail work of further planning and other necessary preparations to get the project rolling. Carefully document the planning and implementation process, monitor what is going on, identify (and celebrate) successes and identify and respond to problems that arise. Save your

documentation (e.g., notes from staff meetings, observations of activities) to incorporate into a “project portfolio.”

Phase V: Decide whether and how to expand your learner leadership efforts.

Use what you produced and learned in the pilot project to decide whether and how to continue the same project, add a new one, share what you learned with others, and otherwise build on your initial effort.

Conclusion

Significant good work has already been done to create resources that can now be adapted for a new national AFE effort that – with learner leadership as a central purpose and feature -- empowers learners as workers, family members, community members, and lifelong learners. Transitioning AFE to a community-oriented model of integrated services can produce significant benefits for more learners, for their families, for the community institutions learners contribute to and benefit from,²⁸ and for AFE and its funders and policy makers.

Those interested in moving the field in this direction should organize themselves to re-think what they can do (e.g., strategic planning, demonstration projects, sharing of resources, professional development, targeted investments) to make this collaborative, community-oriented model a reality.

All involved should approach this work with respect for adult learners, for their families and communities, and for AFE as an important profession – and a recognition of the important roles that these partners can and do play in building democratic, equitable, and healthy communities.

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APPENDIX A

Actions for the Field as a Whole

(More-Detailed Version)

Develop a New Vision for Community-Oriented AFE with Participatory Learning and Learner Leadership Development as Key Components

Those who believe in AFE’s potential benefits for U.S. adults and out-of-school youth and the families and community institutions they are part of should now take a hard look at the why’s and how’s of U.S. adult foundational education. They should do so humbly (with open minds, in the spirit of continuous improvement), collaboratively, and recognizing that:

- U.S. adult foundational education:
 - reaches only a small percentage (less than 10 percent) of the millions of U.S adults who have foundational-skills-related challenges (National Coalition for Literacy, 2021);
 - has in recent years shown it can be resilient in responding to major challenges (e.g., declines in enrollments due to COVID) and opportunities (e.g., increased use of digital technologies to create learning opportunities for learners and professional development and other opportunities for AFE staff) (Belzer, Leon, Patterson, Salas-Isnardi, Vanek, & Webb, August 2022);
 - does this demanding work with meager and unreliable funding, fewer AFE programs, and without easy access to the lessons learned in many past initiatives that were supported by a wide range of public and private sources (Adult Foundational Education Digital Library Group, 2023; Comings, Reder & Rosen, 2021).
- Other important stakeholders (e.g., employers, labor unions, and workforce and economic development agencies; providers

of services to diverse learner populations such as immigrants and refugees, formerly and currently incarcerated individuals, people with disabilities) continue to see the importance of adult foundational skills for the people they serve and rely on. These potential partners could benefit from better-organized collaborations with the AFE field, but are largely under-involved in AFE efforts in substantive ways. These stakeholders often are engaged in efforts (e.g., community renewal and equitable economic development, public health, environmental sustainability, public safety, parent engagement in their children's schools, and other social-justice-related work) that parallel or overlap with the AFE field and the populations that AFE serves. These potential partners have positive motivation, expertise, and financial and in-kind resources that they could bring to collaborations with AFE (Jurmo, Montalto & Rosen, 2019; National Center for Families Learning, n.d.).

- The AFE field has – over decades – developed models of participatory, contextualized education and of partnerships with the above diverse stakeholders. These models can now inform innovative AFE efforts to provide more learners and stakeholders with high quality services.
- Many advocates for AFE are searching for new ways to provide high quality services that respond to the economic, social, health, and other realities of learners and of their families and communities (Jurmo, April 2021; Levesque & McGregor, n.d.; McHugh & Doxsee, October 2018; Mortrude, Spring 2020; Reder, Spring 2020; Uvin et al, 2020; Yankwitt, Spring 2020). Many are also concerned that, though federal policy (which is a key funder and shaper of AFE) might have been well-intended in shifting toward the current focus on employment-related outcomes, such policy is often perceived as overlooking other important learner interests and forcing programs to respond to irrelevant and unrealistic performance goals. When advocates raise these concerns, they often get the message that federal policy isn't going to change from its current goals and performance measures anytime soon -- especially in a period

when bipartisan cooperation seems like a quaint idea from another time.

Those looking for new ways to build AFE systems that have learner empowerment as a central purpose and feature should:

1. Through study, reflection, and dialogue, learn from and adapt past and emerging system reform models for . . .
 - Adult foundational education including:
 - the participatory education and learner leadership models described in Parts 1 and 2 of this document;
 - specific models of AFE system reform, including:
 - the Equipped for the Future (EFF) “system-reform initiative” model (See description of National Institute for Literacy under “Mid-1990s into the 2000s: Formalizing Support for a Participatory Approach and Learner Leadership” above.);
 - “community-oriented” adult education (Fingeret, 1992; Jacobson, 2022; National Center for Families Learning, n.d.);
 - multi-purpose AFE customized to particular learners and contexts (National Commission on Adult Literacy, 2007);
 - “lifelong and life-wide learning” (Reder, 2020).
 - Other fields such as:
 - Collective Impact: <https://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/collective-impact/main>; https://ssir.org/articles/entry/collective_impact
 - customer-oriented governmental and non-governmental organizational development: “reinventing government” [Osborne, 1993] and “high performance work organizations”;

(https://en.wikipedia.org/wiki/High_performance_organization);

- integrated workforce development systems (Grubb, 1999);
- efforts to re-build communities and improve public health in the wake of COVID-19 and over-reliance on isolating and divisive social media (<https://www.murphy.senate.gov/newsroom/press-releases/-murphy-op-ed-americas-epidemic-of-loneliness-is-a-crisis-policymakers-need-to-take-seriously>)
- “place-based” economic development: (<https://www.brookings.edu/blog/the-avenue/2022/09/02/the-build-back-better-regional-challenge-marks-a-new-era-of-place-based-industrial-strategy/>)

2. Develop a two-part “vision” that clarifies why and how participatory education and adult learner leadership can help build more effective, multi-purpose, community-oriented AFE systems.

Borrowing a concept proposed by Fingeret (1991) and others (Hunter and Harman, 1985) who worked with community-based AFE in the 1970s through 1990s, an updated “community-oriented” approach to AFE would focus on helping learners – as individuals and collectively – be able to better understand, respond to, and shape social and other conditions (challenges and opportunities) they encounter in the roles they play in work, family, community, and lifelong learning “communities” (social contexts). Community-oriented AFE – often with other partners such as employers, labor unions, public health organizations, and others -- would provide educational and other supports learners need to successfully perform those roles. (See Jurmo, April 2021).

This dual vision could be created in two steps:

Vision Step 1: Develop a new vision for an alternative, participatory, community-oriented AFE system that has necessary supports to exist alongside current models, to expand the range of AFE services for a greater variety of learners (many of whom might not see "getting a better job" as their priority concern). Such an approach might have these characteristics:

- A more customized focus on the diverse populations of potential adult learners and outcomes that are relevant to work, family, civic, and lifelong learning roles those learners do and might play. Potential learners include diverse demographic groups (diverse by race/ethnicity, gender, age, place of birth, language, education, ability, health status, economic status, legal status), locations (e.g., urban/rural), life roles (occupational, family, community, lifelong learning), and challenges and opportunities (e.g., health and safety, support systems, economic security, digital access, physical environment, housing, transportation). Relevant outcomes for these learners could include improved learner abilities to manage such "life-wide" (Reder, 2020) issues as:
 - their health and that of their families;
 - personal and family financial and in-kind resources;
 - digital technologies;
 - legal issues;
 - housing and transportation;
 - integration with and civic engagement in their communities;
 - transition to retirement;
 - other meaningful personal, family, and civic responsibilities.

- A more holistic understanding that such a mix of learning goals is not necessarily contrary to employment-oriented education. Rather, achieving such learning goals might instead be seen as equipping workers to manage life issues that can determine their ability to attain, perform, retain, advance in, and be responsibly rewarded for employment. For example, the above kinds of "personal, family, and civic"

outcomes are also relevant to the following kinds of work-related functions:

- better understanding of relevant work-related opportunities in their communities (e.g., family-sustaining employment in diverse jobs and industries) and the potential strengths and limitations of each;
 - setting meaningful short- and longer-term career-related goals and a corresponding plan for balancing personal and family needs with the demands of holding a job;
 - attaining required credentials and organizing and presenting them (e.g., in portfolios) to support ongoing educational and career advancement;
 - finding and securing a rewarding job;
 - performing particular social and technical functions of that job;
 - working in diverse, multi-cultural settings;
 - maintaining a safe, healthy, and environmentally-sustaining workplace;
 - participating in ongoing training and education (including study and test-taking skills);
 - understanding and protecting one's rights as a worker;
 - understanding and managing work-provided income and benefits;
 - managing one's own business;
 - dealing with a shifting job market (including potential job loss);
 - preparing for retirement or semi-retirement.
- A greater emphasis on well-planned and -supported collaborations between AFE providers and other important community stakeholders. Well-conceived and -implemented collaborations can take a number of forms, help AFE reach more learners, make services more relevant to both learners and other potential partners, and increase financial and in-kind supports for AFE from those partners.

- Use of evidence-informed learning strategies for helping learners to efficiently develop relevant skills and knowledge within a variety of venues and for monitoring learner progress.
- Use of evidence-informed strategies for vital management tasks such as:
 - assessing the AFE-related needs and interests of learners and community stakeholders;
 - setting AFE program goals and objectives (and organizing them in project frameworks that all involved can understand and work within);
 - monitoring progress and continuous improvement of learner and AFE efforts;
 - providing of comprehensive professional development opportunities (including not just “training” but opportunities for professional-level careers in AFE) for those who are involved in this work;
 - building of partnerships with and investments by important local stakeholders;
 - recruiting of learners from various community groups;
 - creation of multiple venues (e.g., learning centers, self-directed learning, situated learning in workplaces and other community contexts) for learners to develop and practice their foundational skills.
- Effective uses of policy and funding – and digital technologies -- to support the above work. This might include funding of a number of pilot initiatives at the national, state, and community levels, to allow this more comprehensive, community-oriented model to take root and be adapted to local conditions.

Vision Step 2: Develop a new vision for what learner leadership is, why developing it is important and how it can contribute to and result from the above-described more comprehensive,

community-oriented model of AFE. The wording of such a two-part strategic vision might be along these lines:

Community-oriented adult foundational education (AFE) can contribute to the creation of an economy and society that are healthy, productive, environmentally sustainable, safe, and equitable. It can do so by helping adults and out-of-school youth develop the foundational skills and other tools (e.g., background knowledge, educational and occupational credentials, support systems, personal plans, and social-emotional strengths) they need to proactively serve as effective leaders (aka, collaborative problem-solvers) in personally-relevant and -rewarding work, family, civic, and lifelong learning roles.

Helping adult learners become more effective leaders can not only help learners as individuals but enable the social partners they interact with -- their families, communities, workplaces, and adult education programs -- operate more effectively. Learner leadership development should thus not be seen as an "add-on" but as a core purpose of AFE and integrated – in meaningful, user-friendly, respectful, and well-planned and -supported ways – into all aspects of AFE efforts.

Or as a New York City adult learner leader put it (Literacy South, n.d., p. 10):

Students need to be real leaders, not tokens . . . How can we get students to become real leaders? . . . I'm tired of telling my life story – I graduated from that. It's time to talk about other things. Teach us to become leaders.

APPENDIX B

Actions for Supporters of AFE and Community-Oriented Leadership Development

(More-Detailed Version)

Develop Strategies and Resources to Support New Community-Oriented AFE Systems with Participatory Learning and Leadership Development as Key Components

National AFE organizations, public- and private-sector funders, researchers, state and local AFE resource centers, and other stakeholders who have already supported adult learner leadership development can now bring their expertise and resources to new learner leadership efforts. They should consider how they can work with each other and possibly with other stakeholders who are new to this idea of learner leadership to strengthen and expand it as a resource for and outcome of AFE.

“New stakeholders” might include individuals and organizations trying to build the leadership capacities of communities to deal with interwoven challenges such as income security; public health and food security; criminal justice reform and public safety; environmental sustainability; K-12 education; childcare and eldercare; housing, transportation, and digital access; workforce and economic development; refugee and immigration integration; voting; and access for people with disabilities and older adults.)

In Adult Learner Leadership Task Forces, supporters can:

1. Begin by creating their own version of the above-described evidence-informed vision that is relevant to the communities they support. The vision would outline (a) a more effective, community-oriented system of AFE and other supports that serve more learners and their diverse needs and (b) how learner leadership can contribute to and result from such a system.

2. Develop and share resources that stakeholders can use to make that dual vision real, including:

- A plan that shows:
 - the potential benefits (for learners, their families and communities, and AFE) of involving adult learners in leadership roles;
 - the diverse ways that AFE programs can support learner leadership development; and
 - supports that AFE programs need to create such opportunities for learners (See the capacity-building, research, pilot projects, networks, monitoring, policy, and funding described immediately below.)

- Capacity-building opportunities for adult educators, learners, and other stakeholders doing this work, to enable them to plan, implement, and continuously improve relevant leadership supports for learners. These opportunities would include:
 - training, transferable certification, mentoring, and on-the-job learning;
 - an on-line resource collection that allows users to access (a) existing background materials (e.g., documents, websites, videos, audio recordings); (b) resource persons/allies who have experience supporting adult learner leadership and who are willing to provide guidance; and (c) potential financial or in-kind resources that might be tapped into to support learner leadership activities.
 - family-sustaining professional positions and paid internships/apprenticeships for those doing this work. (Don't expect all this work to be done for free. Consider how to use apprenticeship, AmeriCorps, and other funding as resources.)
 - special efforts to bring in and support individuals who can contribute useful technical and cultural knowledge,

empathy, energy, creativity, and other strengths to the pool of individuals doing this work. These might include military veterans; people from diverse racial/ethnic/gender backgrounds; formerly incarcerated individuals; college students and recent graduates; older workers and retirees with particular occupational knowledge; people with disabilities; and former volunteers in Peace Corps, AmeriCorps, and other service programs)

- other practical supports for learners, including universal use of clear language in written and oral communications within AFE programs, coverage of transportation and other expenses incurred by learner leaders, and access for learner leaders to digital technologies.
- New research that builds on prior research and focuses on questions relevant to emerging learner leadership efforts. Research (which might include participatory action research in which program staff and learners play active roles) might help answer:
 - What models of participatory adult literacy education and learner leadership development were developed in the 1980s and 1990s? And what were the arguments, research, and other factors that shaped these efforts?
 - In what ways are or aren't recent AFE research, practice, and policy in sync with past research (e.g., Equipped for the Future, models described in *Focus on Basics*) that supported the kinds of participatory practices described in this article?
 - To what degree and in what ways do current AFE programs and policy support or hinder the use of the kinds of participatory practices described in this article?
This includes:
 - What are the strengths and limitations of emerging uses of technology vis-a-vis supporting participatory practices?

- Do current policy makers and funders understand and support the use of participatory practices? If they do, in what ways?
 - Does a focus on job-related outcomes support or hinder the use of participatory practices?
 - What have been the outcomes of various current efforts (described above) to promote participatory AFE and learner leadership?
 - Has support for participatory AFE and/or learner leadership declined over the past several decades? If so, what factors contributed to that decline?
 - How do – or might – participatory practices and learner leadership activities support social justice goals of learners and programs?
 - Who are the educators (including adult learners) who might take on the work of strengthening and expanding participatory efforts and learner leadership activities in the field? Might they be recruited from the young people interested in social justice and from the communities (of immigrants, current or former inmates, parents, older workers, religious communities) that adult learners often come from? What expertise, credentials, and other supports do they need to do this work?
- Coordinated pilot projects (both “mini” projects at AFE program level and larger ones across communities, programs, states, learner populations) to help more learners, communities, and stakeholders engage in relevant forms of learner leadership development.
 - Networks of those supporting and doing this work, to share effective strategies, build collaboration, provide moral support, elevate awareness of learner leadership, and generate additional needed resources.

3. Monitor and learn from how the above opportunities are used.
4. Update policy and funding guidelines to build on the above experience and support new, community-oriented AFE systems that more effectively respond to learner and community needs.
5. Secure financial and in-kind resources to support effective learner leadership efforts – at both “macro” and community levels --through seed funding, pilot projects, sustained operating costs, and building of partnerships with community stakeholders.

APPENDIX C

Actions for Community-Level Implementers

(More-Detailed Version)

Plan, Implement, Improve, and Expand Community-Oriented AFE Systems with Participatory Learning and Leadership Development as Key Components.

Individuals and institutions considering getting involved in implementing one or more forms of participatory AFE and adult learner leadership development at the local level might:

- review the above-described recommendations for “The Field as a Whole” and “Supporters of AFE and Community-Oriented Leadership Development” to identify ideas they might adapt for efforts in their communities;
- focus on creating and supporting learner leadership activities that are customized to local needs and capacities;
- create an “Adult Learner Leadership Task Force” that explores, plans, generates resources for, implements, monitors, and learns from those activities;
- adapt the following kind of multi-phase process:

Phase I: Identify why you are interested in “learner leadership” and learn what others have already done.

- A. Clarify for yourself: Why might you consider getting involved in “learner leadership”? Jot down why at this early stage you are considering getting involved in learner leadership efforts of some kind within the community and/or institution you are part of. Where did this idea come from? What do you mean by “learner leadership”? Are there particular forms of “learner leadership” you are considering supporting? What do you hope to accomplish for learners, their families and communities, and/or your AFE program?

- B. Learn what others have already done to develop the leadership capacities of adult learners. Dig deeper to familiarize yourself with existing resource materials (e.g., reports and guidebooks like those described in this document.) Reach out to others doing this work now or who have done it in the past (in other programs and within your own) to learn about what they did, why they did it, what was accomplished, what worked (and the supports they required), and what to avoid. In your investigations, identify resources (partners, funders, documents) you might work with, and whether and how you might work with them, to avoid operating in unproductive silos.

Phase II: Clarify how a learner leadership project might be helpful to your institution or community.

- A. Using the examples of learner leadership activities described earlier in this document as a framework, discuss (possibly with the help of an outside facilitator who has expertise in learner leadership and/or collaborative planning):
1. Has your program already supported leadership roles for learners? If so, what happened? Should these existing roles be further strengthened and expanded? If not, why not?
 2. Should you now consider introducing new learner leadership activities? If so . . .
 - Which type of activities? Will you focus more on the higher visibility activities such as “learners as advocates” or “learners as recruiters”? Or do you want to find ways to enhance the quality and quantity of learner participation in the instructional process? (Remember that most learners enroll in programs to learn something that will help them deal with particular issues in their lives. The Teaching Skills that Matter project described earlier has examples of participatory learning activities that you might adapt.)

- What are the potential benefits – and for whom? And what potential challenges might you face?
- What human and material resources will you need to carry out one or more learner leadership projects?

B. Develop a brief concept paper that describes . . .

1. What you've learned so far from the above research and discussions.
2. Why one or more new pilot projects to develop one or more forms of learner leadership within your program might benefit your learners, program, and/or community. (You might adapt the project-based-learning type of leadership training developed by VALUEUSA. COABE also has an introductory "Ambassador" training program designed to prepare participants for subsequent additional leadership activities.)
3. A plan for each proposed pilot project which lays out:
 - How and when you would plan, implement, continuously improve, and report on the project;
 - Other stakeholders (within and/or outside your institution) you might collaborate with);
 - How the proposed activities would relate to (i.e., support and/or benefit from) other activities you already carry out in your program;
 - Resources you would need (e.g., staff and learners to do the work; advisors; facilities, equipment, and other in-kind resources; funding; training for those involved);
4. Guidelines (principles) you will try to follow in your learner leadership work. These might include:
 - How you'll "talk" about learner leadership (i.e., terminology the team will use – and not use)
 - Respecting both the strengths and limitations (e.g., reading difficulties, limited English fluency, lack of prior experience in leadership functions like planning and facilitating meetings, lack of self-confidence dealing with "authority figures");

- Respect for learners and others involved (e.g., listening to others; asking questions when something is not clear, worrying, or unknown; giving constructive feedback . . .)
- Being organized, following through;
- Being willing to “say no” (in a respectful way) if necessary;
- If you “see something” (e.g., a problem, a hurt feeling), diplomatically and constructively “say something” (rather than ignore the problem);
- Seeing a pilot project as a way to try out a number of things and develop a number of strengths for oneself and others;
- Going beyond the superficial and easy and being willing to “stretch” oneself and the team;
- No “showboating”;
- If you can’t (for various practical or philosophical reasons) collaborate, don’t undermine the efforts of others.

Phase III: Generate the resources you’ll need for a pilot project.

Working with individuals within your organization and possibly outside it, identify and reach out to sources who might provide financial and/or in-kind supports for your proposed project. Present a clear, concise version of your proposal to them. You might “start small” (with a modest pilot project that isn’t overly complicated and doesn’t require major investments) and seek seed funding that will allow you to get the project up and running. Focus on producing useful results and lessons learned that you can build on in subsequent projects.

Reach out to potential supporters who already are involved in the kinds of activities you hope to carry out. (For example, a newspaper publisher or print shop might be willing to support a student newsletter or collection of learner writings. A university journalism or arts program might provide technical supports to a project in which learners create their own videos. A local

environmental or public health organization might support a community garden created by learners and their families.)

Phase IV: Plan, implement, and learn from a pilot project.

With resources secured, do the detail work of further planning and other necessary preparations (e.g., training for participating learners, staff, and other partners; purchases of equipment and supplies) to get the project rolling. As appropriate (via a newsletter, emails, meetings of learners and staff, and effective uses of digital communications), inform others within and outside your organization about the project so they understand what's going on and whether and how they might get involved in or support the project in some way.

Carefully document the planning and implementation process, monitor what is going on, identify (and celebrate) successes and identify and respond to problems that arise. Save your documentation (e.g., notes from staff meetings, observations of activities) to incorporate into a "project portfolio" that can be used to inform those involved in the project, those who supported it, and others who might want to carry out or support similar projects in the future.

Phase V: Decide whether and how to expand your learner leadership efforts.

Use what you produced and learned in the pilot project to decide whether and how to continue the same project, add a new one, share what you learned with others, and otherwise build on your initial effort. Consider expanding your initial Adult Learner Leadership Task Force – within your institution, community, and/or state – to spread the word and otherwise continue to strengthen and expand leadership opportunities and supports for learner leaders.

Endnotes

¹ See the glossary for a definition of “adult foundational education.”

² This section draws heavily on Jurmo (1987), Fingeret & Jurmo (1989), and Jurmo (April 2021).

³ “Newcomers” included the Business Council for Effective Literacy and major individual businesses (e.g., B. Dalton Bookseller, the Gannett Foundation), the Barbara Bush Foundation for Family Literacy, the PLUS (Project Literacy U.S.) adult literacy awareness campaign of the ABC and PBS television networks and other media organizations, and author Jonathan Kozol (Kozol, 1985).

⁴ This document will usually use the term “participatory” with the understanding that there are a number of other terms (e.g., student-centered, learner-centered, active learning) used to describe activities that promote higher levels of learner responsibility, control, and reward.

⁵ These descriptions of the early learner leadership efforts of Laubach and LVA draw in part on interviews with Marty Finsterbusch and Peter Waite in later 2022.

⁶ Themes at Con Ed were “justice,” “drugs,” “welfare,” “work,” “manhood,” “woman hood,” “Vietnam,” “housing,” “education,” “health,” “racism,” “soul,” and “religion.”

⁷ Correspondence with Jean Hammink, December 2022.

⁸ Flyers from Lehman College conferences.

⁹ Jurmo (1987) presented case studies of six AFE programs (Center for Literacy and Lutheran Settlement House in Philadelphia; LaGuardia Community College, Literacy Volunteers of New York City, American Reading Council, and Union Settlement House in New York City) that were in various ways using participatory strategies for instruction and program management.

¹⁰ Correspondence with David Rosen, February 2023.

¹¹ Correspondence with Peter Waite, January 2023.

¹² President Bush and the nation’s governors established the National Education Goals Panel in 1990 “to set education goals for the nation by the year 2000. They supported system-wide reform by reporting on national and state progress toward the goals over a 10-year period, working to establish a system of high academic standards and assessments, identifying promising practices to improve education, and building a nationwide, bipartisan consensus to achieve the goals.” Federal Register, <https://www.federalregister.gov/agencies/national-education-goals-panel> .)

¹³ The National Education Goals Panel

<https://govinfo.library.unt.edu/negp/page3-13.htm>

¹⁴ Adult learner leader Archie Willard and adult educators David J. Rosen and Paul Jurmo.

¹⁵ The first two Adult Learner Leadership Institutes were held in Indianapolis, Indiana (in summer 2000) and Columbus, Ohio (in July 2001).

¹⁶ Calvin Miles and Marty Finsterbusch, respectfully.

¹⁷ For information about “collective impact,” visit

<https://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/collective-impact/main> and

https://ssir.org/articles/entry/collective_impact

¹⁸ When it moved its headquarters from New Jersey to Pennsylvania in 2001 and created a new non-profit for itself in that state, VALUE changed its name to “VALUEUSA” to avoid confusion with another Pennsylvania organization that was already using the name “VALUE.”

¹⁹ Marty Finsterbusch

²⁰ Phone interviews with Marty Finsterbusch, 2022-2023.

²¹ Information about TSTM taken from LINCS website on October 15, 2022: <https://lincs.ed.gov/state-resources/federal-initiatives/teaching-skills-matter-adult-education>

²² A major influence was the Student Ambassador program of Pima College Adult Basic Education for College and Career, formerly Pima County (AZ) Adult Education, which grew out of earlier student empowerment efforts described by Hart (March 1998).

²³ Information provided by COABE’s Sharon Bonney and Regina Suitt and the COABE website in October 2022 through February 2023.

²⁴ The ERIC abstract for *Adult Illiteracy in the United States* says: “*Concentrating on the educational needs of the most disadvantaged poor, it recommends a national educational policy that would seek out and give support to community-based initiatives. The book concludes with a call for a long-range strategy that would not only involve programs for victims of social ills but that would enable national leaders and citizens at every level to address questions of social direction.*” <https://eric.ed.gov/?id=ED173775>

²⁵ Communications with Audrey Riffenburgh, 2022-2023

²⁶ See Ilsley (June 1985) for an early discussion of the challenges of learner leadership in U.S. adult literacy programs.

²⁷ See earlier such recommendations in “What Needs to Be Done to Build Participatory Alternatives” in Fingeret & Jurmo, 1989; *Participatory Literacy Education: An Update* (Jurmo, 1993); and *A Different Way: Reorienting Adult Education Toward Democracy and Social Justice* (Jurmo, 2021).

²⁸ Other stakeholders might include employers and labor unions; and supporters of public health, economic development, environmental sustainability, public safety, immigration and refugee services, people with disabilities, and K-12 schools.