

An Experiment in Collaborative Learning:
A Final Report for the Non-Profit Organization,
Learning Partnerships

DRAFT Prepared for the Learning Partnerships Board
on September 3, 2001
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Executive Summary

An Experiment in Collaborative Learning: A Final Report for the Non-Profit Organization, Learning Partnerships

The nonprofit organization, Learning Partnerships, formally began in 1995, when a group of adult educators took over the nonprofit status of the National Literacy Network, which had closed in 1991. Learning Partnerships also was a direct outgrowth of Literacy Partnerships, a for-profit organization which had from 1990 through 1995 provided various kinds of services to adult literacy organizations inside and outside the U.S.

The new nonprofit's mission was to use participatory, collaborative techniques to improve adult education policy and educational practice. While much of LP's work would focus on work-related basic skills, the organization also had an interest in advocacy and leadership development.

With a one-person staff (Executive Director Paul Jurmo) guided by a small board and using donated facilities and equipment, Learning Partnerships carried out nearly 40 projects in the years 1995 through 2000. These projects fall into seven categories:

- Policy analysis (studying and recommending improvements for state and national policy related to adult basic education)*
- Professional training (designing and/or carrying out staff development workshops or conferences)*
- Leadership development and national networks (helping to develop leaders and advocates for adult education as well as networks of practitioners and advocates)*
- Evaluation (formative and summative evaluation of programs)*
- Curriculum development (developing curricula customized to particular learners in the contexts they operate in)*
- Organizational needs analysis and project planning (helping programs understand the needs they need to deal with and then planning education projects geared to those needs in that organizational context)*
- Advisory roles (serving on boards and advisory groups)*

From these projects emerged the following accomplishments, obstacles, and lessons learned:

Key Accomplishments

1. A collaborative model of workplace education.
2. Detailed documentation of workplace education programs.
3. Re-building of a state association for adult education.
4. Putting "learner leadership" on the adult education map and creating VALUE.
5. Field-testing of a "participatory" approach to adult basic education in several

contexts and levels.

6. Pioneering the use of listserves and Web sites for the adult literacy field.

7. Organizing of several successful state and national conferences and meetings.

Obstacles Encountered

1. Work-related adult education disappeared from funders' and policy makers' radar screens.
2. Practitioners' struggling for survival has left them unready to collaborate as advocates.
3. Adult learners often lack the time, background knowledge, skills, or confidence to get involved in learner leadership efforts; and funders aren't supporting this new view of adult education.
4. Administrative demands are overwhelming if sufficient staff aren't in place and if good administrative practices aren't used.

Lessons Learned

1. Work-related adult learning has great potential.
2. Good planning and evaluation are vital.
3. The Internet provides great tools for improving expertise and building advocacy within the adult education field.
4. Learner leadership has great potential.
5. It's not enough for adult educators to develop a good product or service. We also have to "sell" it.
6. The adult education field is populated by tremendous people.

Thanks: Learning Partnerships' Executive Director is grateful for the support shown by the LP board, its funders, its collaborators (individuals and institutions), and his family.

Next Steps: He also intends to do the following to follow up on the experience gained by Learning Partnerships:

1. Continue to develop participatory, collaborative forms of adult education.
2. Explore how to make LP publications available in print or via Web.
3. Keep eyes open for further opportunities, but only if funding and other supports are in place.

PART I: The Origins of Learning Partnerships

Learning Partnerships became a non-profit organization in 1995, when a group of adult educators took over the non-profit legal status of the former National Literacy Network and used it to create a new nonprofit named Learning Partnerships. The idea of a nonprofit agency which would provide various kinds of services to adult education efforts was born several years earlier when Paul Jurmo created a for-profit consulting company, Literacy Partnerships.

Literacy Partnerships, 1990 to 1995

Literacy Partnerships had a similar purpose: use participatory consulting techniques to help adult literacy organizations build participatory forms of adult education. This organizational model drew on the models already existing at World Education (in Boston) and Literacy South (in Durham, North Carolina). The "participatory" approach to adult education had been developed by many adult educators inside and outside the United States and had been documented in Paul Jurmo's 1987 doctoral dissertation and elsewhere.

During the period of 1990 through 1995, Literacy Partnerships -- with Dr. Jurmo as a one-person staff, sometimes working in partnership with others -- carried out nearly 50 projects. These fell into the categories of:

- professional training (designing and/or carrying out staff development workshops or conferences): *20 projects*
- leadership development and national networks (helping to develop leaders and advocates for adult education as well as networks of practitioners and advocates): *4 projects*
- evaluation (formative and summative evaluation of programs): *7 projects*
- curriculum development (developing curricula customized to particular learners in the contexts they operate in): *2 projects*
- organizational needs analysis and project planning (helping programs understand the needs they need to deal with and then planning education projects geared to those needs in that organizational context): *4 projects*
- advisory roles (serving on boards and advisory groups): *9 projects*

Literacy Partnerships' projects are described in Appendix A.

How the nonprofit organization Learning Partnerships was formed

By 1992, Paul Jurmo had begun to talk with a small number of colleagues about the need to form a nonprofit organization as a way of raising funds for the kinds of projects which Literacy Partnerships had already undertaken. This small group of advocates for participatory education realized that private foundations and public funders typically would be more likely to give to nonprofit organizations rather than individuals or small for-

profit consulting firms.

For this reason, Dr. Jurmo sought the help of the former director of the National Literacy Network, which had closed its doors in 1991 and held a close-out meeting of its members at the Highlander Center in Tennessee in January, 1992. At that meeting, several of the participants agreed to (a) create a listserv to link participatory-minded adult educators, (b) explore forming a national network of adult learners, and (c) use the nonprofit status of the National Literacy Network create a new nonprofit organization to carry on the kind of work which the Network had supported.

In fact, all three of those goals were eventually accomplished:

□ The NLA listserv was created by David Rosen in 1994 and continues to today as a key vehicle linking adult educators around policy issues.

□ In August 1992, adult learners came together from around the U.S. in the "GATHER" conference in Pittsburgh. Organized by learner learner Marty Finsterbusch (with the help of World Education), this meeting was intended to bring adult learners together to create their own national network. Although no such organization resulted directly from the meeting, the idea persisted until VALUE was formed in 1998. Marty Finsterbusch now serves as VALUE's executive director.

□ Learning Partnerships was created by Paul Jurmo in mid-1995, with the help of David Rosen, Jean Hammink, and Gloria Grady Mills who attended the National Literacy Network meeting at Highlander.

Beginning in 1994, Paul Jurmo organized a series of conference calls with people who had attended the 1992 meeting at the Highlander Center to discuss the feasibility of creating a new nonprofit organization from the remnants of the National Literacy Network. These calls led to the creation of an advisory group which agreed that Dr. Jurmo should go ahead and draft a mission statement, by-laws, and articles of incorporation. Over a nearly two- year period, the group revised these documents, agreed to work with the former accountant of the Network, and launched Learning Partnerships as a new nonprofit organization.

LP's mission was to "provide various kinds of resources to the adult basic education field. More specifically, we will provide tools to those committed to helping learners develop the knowledge, skills, belief in self, and relationships they need to participate actively in the improvement of their own lives and of the community contexts in which they live and work." To accomplish this, the organization was to use participatory, collaborative techniques to improve adult education policy and educational practice. While much of LP's work would focus on work-related basic skills, the organization also had an interest in advocacy and leadership development.

This work would, at least initially, continue to be carried out primarily by Paul Jurmo as executive director. He and the board agreed that it would be a challenge for him to carry out the many responsibilities of project development and implementation, accounting, publishing of documents, and overall administration.

The role of the Learning Partnerships board

Supporting and guiding the executive director was a small board composed of long-time adult educators who shared an interest in participatory education. The first board for Learning Partnerships consisted of David Rosen, Jean Hammink, Gloria Grady Mills, Sue Folinsbee, and Juliet Merrifield. This board evolved over time, as several members had to resign due to other commitments and new members were added. These new members were Art Ellison and Leslie Shelton.

This board initially met several times a year via conference calls. Those calls became less frequent in the last two years of the organization, barely meeting the minimum requirement of one call per year. However, in that period (1998-2000), LP was focusing almost all of its efforts on supporting the establishment of VALUE and LP's director spent much time working with VALUE's board by telephone, e-mail, and annual planning retreats. The VALUE board was, in effect, playing the role of a board for Learning Partnerships during this period. David Rosen participated both as an advisor to VALUE and on the VALUE board, thereby ensuring a link and continuity between the two decision-making bodies.

Learning Partnerships' finances

As outlined in Appendix C, Learning Partnerships operated its own bank account from 1996 through mid-2001. \$194,734.12 flowed through that account in that period, with much of that amount representing VALUE-related income and expenses, as LP served as VALUE's fiscal agent from 1998 through mid-2001.

LP filed annual tax reports and monthly taxes on Paul Jurmo's fees with the help of accountant Mary Engebretson of Affordable Business Services (at 1642 Van Dyke Street, St. Paul, Minnesota 55119-4233, 651-774-1946).

Paul Jurmo's gross salary for the four years in which he earned one for LP averaged \$23,413.74 per year. Other categories of expenses were telephone/fax/e-mail, postage, printing, supplies, transportation, meals, hotel, fees to accountant and VALUE personnel, equipment, utilities, rent, and other.

LP closed with no working equipment or capital goods to be liquidated.

Detailed spreadsheets showing income and expenditures for the LP accounts were submitted to the LP board on July 9, 2001 with Appendix C. These and receipts are available on request.

PART II: Learning Partnerships' Projects

From 1996 through 2000, Learning Partnerships provided services similar to those previously provided by the for-profit Literacy Partnerships. Most of these projects were carried out solely by the executive director, Paul Jurmo, although virtually all the projects required some form of involvement of the agencies serving as partners in the projects. LP operated out of an office provided in the basement of Paul Jurmo's home in East Brunswick, New Jersey, using office equipment supplied by Dr. Jurmo.

The more than forty projects carried out by Learning Partnerships are outlined below. These ranged from one-time workshops to multi-year, complex research and development projects. Appendix B contains reports and other documents which emerged from many of those projects.

Policy analysis

U.S. Department of Education, Fall 1997-October 1998: Prepared monograph on national policy for work-related adult education.

New Jersey Association for Lifelong Learning, 1996 - Present: Helped expand NJALL's efforts to improve state policy for adult education. This has included preparing advocacy statements, organizing policy discussions at state conferences, serving on a state advisory panel, giving testimony in policy forums, and writing a report on a 1999 and 2000 state conferences.

National Institute for Literacy, October 1995-October 1996: Under Literacy Leader Fellowship, conducted a national study of the role of workplace basic education in state-level workforce development policies.

Professional training

New School for Social Research, New York City, Fall 1999 and Fall 1998: Instructor in certificate course for adult education professionals on topic of workplace basic skills.

New Jersey Association for Lifelong Learning, 1996 - Present: Helped plan five statewide conferences for adult educators.

New Jersey Association for Lifelong Learning, April 1999: Co-facilitated day-long symposium in which New Jersey adult educators developed recommendations for strengthening adult education's role in the state's workforce development initiative.

Perth Amboy (NJ) Adult Education Program, November 1998: Gave half-day workshop on work-related adult basic education for teachers providing ESOL instruction to welfare recipients.

Massachusetts Coalition for Adult Education, October 1998: Keynote speaker at state adult education conference in Marlboro, Massachusetts.

Literacy Volunteers of America, October 1998: Conducted workshop on policy for work-related adult education at national conference in Houston, Texas.

Kentucky Adult Education Conference, October 1998: Facilitated two sessions at this state conference, one on work-related adult education policy and the second on adult learner leadership.

Workforce Education Institute, August 1998: Served as keynote speaker and resource person for a three-day statewide conference at Northampton Community College sponsored by the Pennsylvania Department of Education.

Garden State Employment and Training Association Conference, May 1998: Co-facilitated a workshop on work-related adult basic education at this conference for job training specialists.

Paulo Freire Conference, Montclair State University, May 1998: Member of panel discussing the influence of Freire on our life and work.

Literacy Volunteers of New Jersey state conference, April 1998: Co-facilitated a workshop on adult learner leadership.

Workplace Learning Conference, Milwaukee, April 1998: Co-facilitated a workshop on work-related adult basic education policy at this international conference.

Winter Institute on Workplace Education, Georgia Institute of Technology, January 1998: Co-led workshop on work-related adult education policy.

"Moving Forward" Forum on Workplace Education, Toronto, December 1997: Led a roundtable on workplace literacy policy at this national conference.

New York State Workplace Literacy Conference, New York City, December 1997: Co-led a workshop on the collaborative approach to workplace basic education for recipients of New York State workplace education funds.

Commission on Adult Basic Education, May 1997: Participated in a panel of National Institute for Literacy Fellows at COABE's conference in Detroit.

National Alliance of Business, October 1996: Organized a panel on workplace basic education policy at NAB's annual conference in Los Angeles.

Casco Bay Partnership for Workplace Education, August 1996: Facilitated several policy discussions at a statewide workplace education institute at the University of Southern Maine.

Maryland State Education Department, June 1996: Facilitated policy-related workshops at the Maryland state workplace education conference.

Commission on Adult Basic Education, May 1996: Conducted sessions on workplace education policy and practice at COABE's national conference in Pittsburgh.

Workplace Learning Conference, April 1996 and 1997: Conducted sessions on workplace basic education policy and practice at the first two annual conferences organized by the University of Wisconsin's Center on Education and Work. Also organized and hosted special receptions for the Workplace Education Collaborative.

Leadership development and national networks

VALUE, Winter 1997- 2000: Under grants from the National Institute for Literacy, the National Coalition for Literacy, Time Warner and other sources, worked with a board of adult education students and professionals to establish VALUE (Voice for Adult Literacy United for Education), a national organization for current and former adult literacy students. Organized two national conferences, a Web site ("www.literacynet.org/value"), and two electronic lists.

Lila Wallace - Reader's Digest Foundation, July - December 1996: With consultant David Rosen, organized the initial planning (including recruitment of a project director and selection of project sites) for the What Works Literacy Partnership, a three-year network of outstanding adult literacy programs coordinated through Literacy Partners, a nonprofit based in New York City.

Evaluation

Western Suffolk BOCES, Fall 1998 - Summer 1999: Evaluator on federally-funded multi-generational literacy project for welfare recipient families on Long Island.

ERIC Clearinghouse on Adult and Career Education, Ohio State University, Fall 1998: Member of national expert panel which reviewed reports from federal workplace literacy programs, to identify exemplary curriculum and evaluation documents.

Western Suffolk BOCES, 1997: Conducted an evaluation of a federally-funded workplace basic skills program on Long Island.

Curriculum development

Nonformal Education Division, Ministry of Education, Ghana, March 1999: Under a World Bank contract (through U.S.-based World Education), co-facilitated a three-week workshop in Accra. Ghanaian adult educators developed a strategic plan and prepared curriculum and assessment tools for basic reading, writing, and math for their national 17-language functional literacy program.

New York State Education Department, September 1994 - Summer 1998: Consultant to seven-site federally-funded workplace education program, responsible

for workplace needs assessment, curriculum design, staff development, and linking sites via electronic mail. With CUNY's Jane MacKillop in 1997, facilitated the first-ever Internet-based professional development course for workplace educators.

Organizational needs analysis and project planning

Consortium for Worker Education, December 1999: Wrote proposal on behalf of consortium of union-based education programs in New York City, to create learning centers for TANF recipients. Participants were to improve the skills and knowledge (including computer literacy) needed to earn a GED, get and hold decent jobs, and manage their family situations.

Advisory roles

- ERIC Clearinghouse on Adult, Career, and Vocational Education, Fall 1999: Reviewer of monograph on union-based worker education and training.
- Adult Literacy Work Group, New Jersey State Employment and Training Commission, 1999: Member of committee mapping out strategic plan for linking adult education to workforce development.
- National Center for the Study of Adult Learning and Literacy, Harvard University, 1999: Reviewer of paper on work-related literacy being prepared by NCSALL director John Comings and economist Alex Levinson of the Milken Institute.
- National Institute for Literacy, 1998: Advised Literacy Leader Fellow in the preparation of a study of the connection of adult basic education to welfare reform.
- National Institute of Adult Continuing Education, England, 1997: Advisor to authors of Literacy and the New Work Order: An International Literature Review.
- National Center for the Study of Adult Learning and Literacy, 1997: Member of committee advising author of research paper on performance accountability for adult literacy education.
- Workplace Learning Conference, 1996 -7: Served on program development committee for planning of 1996 and 1997 international workplace education conferences organized by the Center on Education and Work at the University of Wisconsin.
- Literacy Volunteers of America, 1996: Member of assessment and workplace literacy advisory committees
- Literacy Volunteers of Middlesex County, NJ, 1996: Member of advisory committee to local LVA affiliate.

PART III: Accomplishments, Obstacles, and Lessons Learned

Key Accomplishments

From the above projects, a number of positive outcomes resulted:

1. A collaborative model of workplace education was developed and adopted.

The team evaluation models developed in the early 1990s with Laura Sperazi and Sue Folinsbee led to a broader "collaborative" or "team" approach to integrating workplace basic education with other workplace change initiatives. This approach included a "workplace needs assessment" process which develops a thorough plan or ensuring program relevance and stakeholder buy-in.

This model was further developed and documented in a federal workplace education project in upstate New York in the mid-1990s and is now widely used in Canada and Massachusetts and, most recently, in the union-based Consortium for Worker Education in New York City.

Many of the elements of such an approach are commonly cited as key ingredients of effective workplace education programs, even if funding and overall support for such programs has been reduced since the mid-1990s.

2. Detailed documentation of workplace education programs.

A half dozen evaluation reports, a summary of feedback from participants in a national workplace education conference, reports from several meetings of the Workplace Education Collaborative, a guidebook from a three-year federal workplace education project, three national policy papers (for the National Institute for Literacy, U.S. Department of Education, and Workplace Education Collaborative), and two state-level policy papers (for the New Jersey Association for Lifelong Learning) provided broad and detailed information about work-related adult basic skills efforts in the U.S. over the past fifteen years. Most of these documents have been stored at the ERIC Clearinghouse at Ohio State University and are potentially useful for practitioners and policy makers interested in workplace literacy and other forms of work-related basic education.

3. Re-building of a state association for adult education.

Learning Partnerships' director has played a key role in reviving a nearly-dead adult education association in New Jersey over the past five years. From a point at which the association had no funds and had had to cancel its annual conference, the association has grown in terms of its budget and membership, has run a number of successful conferences, and is now making advocacy a focus of its efforts. For his role on the team which produced those changes, the director was given the association's Leadership Award last year.

4. Putting "learner leadership" on the adult education map and creating VALUE.

Learning Partnerships played a key role in creating VALUE, the national organization for current and former adult literacy students. LP's director helped run VALUE's conferences and board meetings, raise funds, run its Web site (www.literacynet.org/value) and listserves, produce reports, do mailings, and maintain its member database. Many of these roles have now successfully been turned over to an adult learner who now serves as VALUE's executive director. In the process, hundreds of adult learners from around the U.S. have received training and information to help them be more effective leaders in their education programs and communities. These efforts have also led a number of federal and state policymakers to formally recognize the leadership potential of adult learners and invest in activities in which learners take leadership roles.

5. Field-testing of a "participatory" approach to adult basic education in several contexts and levels.

LP was created with the hope that it would provide an opportunity to develop and field-test the "participatory approach" to adult literacy education. LP's director had researched this concept of "participatory literacy education" in his doctoral dissertation in the mid- to later-1980s and hoped to create an organization in which participatory education principles and practices could be tried, reflected on, improved, and documented.

In this sense, LP was very successful, as we were able to try the participatory approach in several areas of adult education practice and policy: a team approach to workplace education, fostering of adult learners as leaders, advocacy for improved adult education policy, and program and conference planning.

6. Pioneering the use of listserves and Web sites for the adult literacy field.

LP's director has operated two listserves for workplace educators and two for adult learners. He has also played active roles as a participant in two other listserves and has set up and managed a national Web site for adult learners. These were in many cases the first uses of such technologies to link adult educators or learners to discuss issues of concern to them.

7. Organizing of several successful state and national conferences and meetings.

LP's director played a key role in organizing several state-level conferences (especially in New Jersey) as well as national-level conferences and meetings related to workplace education or learner leadership. While the events themselves were successful, another outcome was a collaborative planning model in which a broad range of stakeholders were actively involved (via conference calls, e-mail, and face-to-face meetings) in planning and carrying out well-attended, successful events which focused on participant needs.

Obstacles Encountered

1. Work-related adult education disappeared from funders' and policy makers' radar screens.

As described in our 1998 monograph for the U.S. Department of Education, national-level policy makers essentially dropped workplace literacy as a focus for policy and funding and they similarly did little to develop adult basic education as a tool for economic and workforce development. This was despite the Workforce Investment Act and its call for a focus on using adult education to help improve the employment status of unemployed and underemployed adults.

NIFL's Equipped for the Future initiative was an exception to the general lack of federal-level action in this area, as EFF did provide tools for adult educators to use to help learners with work-related goals. However, so far employers and unions have not been very involved in using EFF.

The business community has largely dropped workplace literacy as an issue, despite much coverage of this issue in the media and among researchers in the late 1980s and early 1990s. Organized labor has done some work on this issue through individual unions and through a few statewide labor coalitions, but has not generally organized around worker basic education on a national level.

Only a few states have made workplace literacy a focal point of their workforce development initiatives.

This general lack of interest in and funding for work-related basic skills among decision-makers made it difficult to find places to use the expertise developed by Learning Partnerships in its earlier years.

The cause of this lack of interest in work-related basic skills is unclear. Was it simply that policy makers (who tend to go in and out of jobs and typically lack background in this specialized area of work-related basic education) were ignorant of the potential and needs of this field? Or were they overwhelmed by demands to cut costs and found "worker basic skills" without an active constituency and therefore an easy area to cut or ignore? Or have policy makers looked carefully at the issue of the under-educated workforce and concluded that it is too massive and complex an issue to tackle?

2. Practitioners' struggling for survival has left them unready to collaborate as advocates.

Although there have been some good examples of practitioners banding together at the national and state levels to advocate for adult education, too often practitioners have been struggling to survive and respond to new reporting requirements. This has left them with little time or energy to work with other practitioners and learners to develop advocacy messages and undertake sustained efforts to educate and pressure policy makers to support adult education. LP's efforts to build networks of practitioners at national and state levels have had to operate in such an environment. While such efforts to organize constituencies for adult education are important and have potential, they require a lot of work and there was essentially no funding to cover the time LP's director has put into such work.

Especially frustrating is the fact that so many adult educators who preach

collaborative learning and action for social change are unwilling or unable to reach out and work with others outside their comfortable circles of friends. They are unable or unwilling to do the hard work of building a strong constituency for an effective adult learning system in their communities, states, and nation. The Internet provides a wonderful communication and organizing tool for advocates and the field has now had lots of experience with successful advocacy drives; the rest of the field now needs to learn how to step outside their comfort zone and use the existing expertise, networks, and communication tools to get the resources our field needs.

3. Adult learners often lack the time, background knowledge, skills, or confidence to get involved in learner leadership efforts; and funders aren't supporting this new view of adult education.

While a small number of adult learners have had the time, background knowledge, skills, and confidence (in themselves and others) to get involved in learner leadership efforts, most lack some or all of those key ingredients. To overcome such obstacles requires patience, nurturing by existing learner leaders and sensitive and knowledgeable practitioners, and the building of an infrastructure (to provide information, training, and other supports) at program, community, state, and national levels to support learner leadership. VALUE and various state-level learner leadership initiatives are good starts, but -- apart from funding from the National Institute for Literacy and a few other sources (especially in key states like Delaware, Massachusetts, Ohio, Indiana, Pennsylvania, Florida, Washington) -- funders have generally not recognized the value of learner leadership. This lack of support from funders has made it very difficult for those who believe in this different perspective on the potential of adult education and adult learning.

4. Administrative demands are overwhelming if sufficient staff aren't in place and if good administrative practices aren't used.

For its entire existence, LP's director struggled with the competing demands of (a) doing the work he saw as important and enjoyed and (b) finding funding and otherwise putting in place the administrative supports this work required. He -- or someone else -- needed to have the expertise and time necessary to raise funds and handle bookkeeping and other paperwork required to run multiple projects with several funders and partners (and pay the director a living wage). He was not able to handle these administrative demands very well, something which contributed to the decision to close LP.

Lessons Learned

1. Work-related adult learning has great potential.

Well-planned and well-supported adult education efforts in the workplace have great potential for helping organizations adopt new technologies and management practices. Similarly, work-related adult education outside the workplace can help both employed and unemployed adults develop knowledge and skills they need to find suitable jobs and succeed in them and otherwise play productive and rewarding roles

as workers in the emerging economy.

Adult educators have developed expertise in these areas, and policy makers -- including employers, union officials, and public policy makers -- need to understand this, draw on the expertise that already exists, and build effective workplace learning systems within workplaces and at the community and state levels.

2. Good planning and evaluation are vital.

LP's experience in planning both workplace education programs and other kinds of adult education programs has shown the value of thoughtful, ongoing planning, evaluation, and continuous improvement of programs. We were able to develop a planning methodology which merged good ideas from the fields of adult education and organizational development. This is in contrast to the too-familiar approach which many programs take of simply complying with the minimal requirements of program funders or a continual re-use of old instructional practices and a top-down decision-making process which leaves learners, staff, and other stakeholders out of the planning process.

However, for the collaborative approach to program planning and implementation to work, a number of key ingredients -- including time, expertise, clear goals, a "team" mentality, and a commitment to creativity and continuous improvement -- need to be in place.

3. The Internet provides great tools for improving expertise and building advocacy within the adult education field.

E-mail and web sites are great ways to get out information, share ideas, and otherwise involve staff and learners in program planning and in their own professional development. Helping adult educators get access to and expertise in such technologies -- and then providing them with incentives and opportunities to use them -- should be a top priority for administrators and policy makers.

4. Learner leadership has great potential.

Now policy makers are acknowledging the importance of "listening to what adult learners have to say." However, policy makers, administrators, and teachers need to find creative ways to help learners step into and succeed in leadership roles. This not only can help programs but help learners develop the knowledge, skills, and self-confidence to use what they learn in more-active roles in their families, communities, and workplaces. This equipping of learners as active leaders in various life contexts should be seen as a primary mission of adult education, not as a secondary "add on."

5. There is a need for the kind of services provided by Learning Partnerships.

Although LP wasn't able to generate enough income to cover its costs, there nonetheless was a clear need for the kinds of services which LP provided. We were able to take on projects which produced new practices, new channels for communication and advocacy, and new funding (in the case of VALUE). We did these on a small budget and often with a quick turn-around time. In this sense, we were

customer oriented and efficient in keeping with "TQM-type" guidelines.

6. It's not enough for adult educators to develop a good product or service. We also have to "sell" it.

Adult educators have used their creativity to develop new forms of practice which meet learners' needs and can respond to concerns of public policy makers, community groups, employers, unions, and other stakeholders. We thus have lots to offer but too often find ourselves without the basic supports -- of professional salaries and benefits, technologies, and other tools -- we need to use this expertise.

We lack many champions besides ourselves. We thus need to become active and effective advocates for ourselves, for our programs, and for the learners we try to serve. This will include developing clear position papers and presentations, developing expertise in "marketing" and advocacy, getting ourselves invited to policy-making forums, and taking the time to knock on doors to get to know funders and policy makers. Otherwise the many fruits we have nurtured are likely to wither on the vine.

7. The adult education field is populated by tremendous people. This field -- though often overlooked, undervalued, and underfunded -- is made up of practitioners, learners, and others with tremendous talents, creativity, and commitment. Learning Partnerships had the privilege of working with many hundreds of these people and benefited greatly from that collaboration.

PART IV: Thanks and Next Steps

Thanks

The work described above has been personally rewarding for me as LP's director and, I believe, for most of the partners with whom LP has collaborated. I would like to express my gratitude to the following people. These include individuals and institutions who worked in the early 1990s with the for-profit Literacy Partnerships and laid the groundwork for the work which was eventually done by Learning Partnerships.

LP's board members

The following people gave their time to serve on the Learning Partnerships' board: Art Ellison, Sue Folinsbee, Gloria Grady Mills, Jean Hammink, Juliet Merrifield, David Rosen, and Leslie Shelton.

Supporters

LP had many funders and supporters for its projects, including:

The National Institute for Literacy
U.S Department of Education
ABC CANADA and Joanne Linzey
Massachusetts Department of Education
New York State Education Department
New Jersey State Employment and Training Commission
Time Warner
Consortium for Worker Education
American Express Company

Collaborators

LP's "collaborative" approach by definition required many partners. These included:

David Rosen
Sue Folinsbee
Laura Sperazi
Debby D'Amico
The board and members of VALUE
Bob Knower and the team which ran "Collaborative Learning for Continuous Improvement" workplace education project
The board of the New Jersey Association for Lifelong Learning
Western Suffolk BOCES
ERIC Clearinghouse on Adult and Career Education at Ohio State University
Nonformal Education Division of Ghana's Ministry of Education

World Education
Carol Clymer and workplace education staff at El Paso Community College
Jon Engel and the Workforce Instructional Network
Donna Manly, Tony Sarmiento, and other organizers of the Workplace Learning
Conference
Members of the Workplace Education Collaborative
Literacy Partners
Student Coalition for Action in Literacy Education

Family

My family showed tremendous patience and helped in innumerable ways as they watched me tinker with adult education in my basement office for ten years.

Next Steps

1. Continue to develop participatory, collaborative forms of adult education.

I am convinced that the kinds of participatory, collaborative practices LP worked on are valid and important. I will continue developing them, using them, and promoting them within the field. I will apply them in a number of contexts: the development of work-related adult basic education programs, advocacy efforts for adult education, the development of professional development opportunities in the field, and the development of learner leadership.

2. Explore how to make LP publications available in print or via Web.

Learning Partnerships (and its predecessor Literacy Partnerships) generated a large number of handbooks, reports, and articles of potential usefulness to those interested in work-related basic education, adult education policy, participatory literacy education, and learner leadership. (See Appendix B.) Many of these nearly thirty documents are currently housed at the ERIC Clearinghouse at Ohio State University. The National Institute for Literacy and U.S. Department of Education each also have one LP publication available on-line. However, I will explore other means of making some or all of these publications more easily available (perhaps as a "Learning Partnerships collection") through a publishing company and/or via a Web site.

3. Keep eyes open for further opportunities, but only if funding and other supports are in place.

I will remain open to working with others to do the kind of work which LP tried to do in the past decade. However, next time I will need to have adequate funding and institutional supports, both to ensure my own personal well-being and that of my co-workers and to ensure that the work will be able to take root and grow.

APPENDIX A

Projects of Literacy Partnerships, 1990 - 1995

Professional training

Maryland State Education Department, July 1995: Conducted a half-day workshop on "Problem-Solving: A Tool for Workplace Educators" at the Department's summer institute for adult educators.

National Environmental Training Association, March 1995: Conducted a workshop on the integrated approach to workplace education, training, and development.

New Jersey Association for Lifelong Learning, October 1994 and March 1995: On a pro-bono basis, helped plan two statewide workshops to enable literacy educators to develop strategies for continuous improvement of New Jersey adult literacy programs.

Texas Community and Technical College Workforce Literacy Consortium, May 1993: Led workshop and made presentation on team approach to evaluation for workforce educators from Texas and other states.

Ohio State University, October 1992: Guest speaker at colloquium on adult education, providing an update on participatory approaches to adult literacy education.

Partnership Against Illiteracy, August 1992: Facilitated half-day workshop for Newark-area literacy practitioners, analyzing their current evaluation and assessment activities and identifying possible steps to strengthen them.

New York State Education Department and New York State AFL-CIO, January 1992-June 1992: Designed and conducted workshops for staff of state-funded workplace literacy programs. Project aimed at preparing participants to carry out formative evaluations of their programs.

Texas Community and Technical College Workforce Literacy Consortium, May 1992: Led two workshops for workforce educators from Texas and other states, one a half-day examination of lessons learned in a demonstration project in Texas, the other a 1 1/2-hour look at a "team" approach to evaluation, assessment, and planning.

El Paso Community College, February 1992: In a three-day consultancy, facilitated two workshops for staff of the College's Literacy Center, which provides services in community-based and workplace settings. Participants developed strategies for dealing with planning, evaluation, and other issues facing them in their work.

Workforce Instructional Network, San Marcos, TX, December 1991: Planned and facilitated a two-day formative evaluation workshop for federally-funded educators applying participatory, whole-language principles in small-business workplace contexts.

American Society for Training and Development, New York City Chapter, November 1991: On a pro-bono basis, helped local ASTD chapter to plan and run a half-day workplace literacy conference for area human resource development officers.

Greater Hartford (CT) Alliance for Literacy, October 1991: Led planning session in which federally-funded Alliance policy makers considered strategies for helping local workplace basic skills programs to deal with evaluation-related needs.

United Steelworkers of America, August 1991: Led workshop for staff of the USA's Institute for Career Development. Participants considered options for setting up an assessment system for Steelworker education programs.

ABC CANADA: July 1991: As facilitator of an organizational-development workshop, helped in early planning of

a national-level strategy for involving business and labor in workplace literacy efforts in Canada.

Alamo Private Industry Council, San Antonio, TX: April 1991: Presented keynote address at statewide workplace literacy conference.

Baltimore READS, Baltimore, MD: April 1991: Made presentations on workplace basic skills and participatory literacy education at city-wide literacy conference.

Teachers of English for Speakers of Other Languages, New York, NY: March 1991: Spoke on workplace basic skills panel at 1991 T.E.S.O.L. conference.

Literacy Volunteers of New York City: January 1991: Ran organizational-development workshop to help LV-NYC clarify what roles it might play in workplace literacy.

Rural Capital Area Private Industry Council, Round Rock, TX: January - March 1991: Helped plan and run (and made keynote address at) a two-day conference to enable the literacy community in nine rural counties to develop strategies for improved services.

Leadership Development and National Networks

Workplace Education Collaborative, 1993 - 1998: On a pro-bono basis, organized and facilitated a series of meetings of workplace educators in the U.S. and Canada to develop a theory and practice for new approaches to workplace basic skills education. Also managed a listserv for WEC members, the first-ever workplace literacy list and one of the first lists in the adult literacy field. Among other things, the list allowed dozens of adult educators from across the country to help write a joint position paper suggesting changes in the National Workplace Literacy Program.

Bronx Educational Services, Spring 1995: Prepared background papers and otherwise helped BES plan a national network of community-based literacy practitioners, under grants from the Melville and Lila Wallace/Reader's Digest Foundations.

National Literacy Alliance, 1993- 1995: Served as vice president of this informal association of literacy activists (an outgrowth of the National Literacy Network) which led to the creation of the NLA List, a national e-mail forum for discussion of adult literacy policy which was founded and run by NLA member, David Rosen.

Association for Community Based Education, March 1992: Assisted ACBE's national office in Washington, DC to edit a handbook to prepare community-based organizations to respond to new reporting requirements of the federal Adult Education Act.

Evaluation

National Institute for Literacy, November 1992- July 1994: With Laura Sperazi, co-directed a national research project aimed at refining a "team" approach to planning and evaluating workplace basic skills programs. Products included a handbook, literature review, and case studies. This approach has since been adapted widely in Canada, Massachusetts, and New York State.

ABC CANADA, July 1992 - October 1994: Assisted a Canadian pilot project which produced handbooks on workplace needs assessment and evaluation of workplace basic skills programs.

Mercy College, September 1993 - December 1994: Evaluated U.S. Department of Education-funded workplace education program at Semi-Alloys, a computer chip manufacturer in Mount Vernon, NY.

El Paso Community College, 1992 - 1993: Served as outside evaluator on a U.S. Department of Education-funded workplace basic skills program conducted by EPCC at Levi Strauss and other garment-manufacturing companies. The program used specially-prepared video tapes to teach workplace skills and knowledge.

Rutgers Initiative for Skills Enhancement, December 1991-August 1992: Co-facilitated formative evaluation of federally-funded workplace literacy program based at Rutgers University.

Evaluation Research Inc., Newton Highlands, MA: November 1990 - November 1991: As member of a three-person team, helped employee basic skills programs sponsored by the Massachusetts Workplace Education Initiative to plan and carry out their own outcome evaluations.

U.S. Department of Education, September 1991: As consultant to Evaluation Research, Inc., co-wrote a report about a conference of recipients of US Department of Education workplace literacy grants.

Curriculum Development

American Express Company, September - December 1992: Developed curriculum for and served as lead instructor in 11-week job-related basic skills program for employees in the reprographics, mail, and courier and freight departments at company's New York City headquarters.

American Express Company, New York, NY: April - May 1991: Served as instructor in a six-week employee basic skills pilot project at American Express headquarters, adapting and expanding on curriculum designed by Matrices Consultants, Inc.

Organizational Needs Analysis and Project Planning

Eastman Kodak, July 1995: Helped Kodak's workplace education team develop strategies for integrating their basic skills program with other organizational change initiatives.

Fiber Flex Co., December 1994- January 1995: Conducted a workplace needs assessment at a Newark, NJ auto parts manufacturer.

ABC CANADA, April 1992: Facilitated 2 1/2-day strategic-planning retreat for staff of Canadian national workplace literacy service.

Center for Applied Linguistics, Washington, D.C.: March 1991: In two-day consultancy, helped CAL develop a strategy for delivering workplace basic skills services.

Advisory Roles

□ National Clearinghouse for ESL Literacy Education, 1995: Reviewer for Evaluating Workplace ESL Instructional Publications, a digest of this Adjunct ERIC Clearinghouse.

□ ABC CANADA, 1995: Advisor to writer of curriculum development handbook for workplace educators.

□ Center for Workforce Education, 1995: Reviewer for Literacy Pays, a workplace literacy booklet published by unit of Laubach Literacy International.

□ New York State Education Department, LaGuardia Community College, University of Tennessee, Western Suffolk County (NY) BOCES, March 1994: Advised workplace education provider agencies in their preparation of proposals for U.S. Department of Education funds.

□ Student Coalition for Action in Literacy Education: Member of national board, 1992-1994.

□ ERIC Clearinghouse on Adult, Career, and Vocational Education, November 1992: Served as outside reviewer of an ERIC guide to the literature on workplace literacy.

□ Office of Technology Assessment, U.S. Congress, June 1992: Reviewed research report on uses of computer-assisted instruction in adult literacy programs.

□ Newark Literacy Campaign, June 1992: Advisor to Ford Foundation-funded evaluation.

□ Partnership Against Illiteracy, July 1992: Helped this technical assistance organization for Newark-area literacy programs to prepare a proposal for the National Workplace Literacy Program of the U.S. Department of Education.

APPENDIX B

Publications Developed by Literacy Partnerships and Learning Partnerships, 1990 - 2000

- Folinsbee, S. and Jurmo, P. Collaborative needs assessment: A handbook for workplace development planners. Don Mills, Ontario: ABC CANADA, 1994.
- Folinsbee, S. and Jurmo, P. Collaborative workplace development: An overview. Don Mills, Ontario: ABC CANADA, 1994.
- Jurmo, P. Adult education's role in New Jersey's workforce development system: A report from the 1999 pre-conference seminar. Lambertville, NJ: New Jersey Association for Lifelong Learning, 1999.
- Jurmo, P. Integrating adult basic education with workforce development and workplace change: How national-level policy makers can help. Washington, DC: U.S. Department of Education, October 1998.
- Jurmo, P. Collaborative learning for continuous improvement: Team learning and problem solving in a workplace education program. Albany, NY: New York State Education Department, August 1998.
- Jurmo, P. Where does adult basic education fit in the new "systems" approach to workforce development? Literacy Across the Curriculum (a journal of the Centre for Literacy, Montreal), Vol. 3, No.4, 1998.
- Jurmo, P. State-level policy for workplace basic education: What advocates are saying. Washington, D.C.: National Institute for Literacy, 1996.
- Jurmo, P. Organizational and individual assessment: Decision-making tools for workplace educators. Illinois Journal on Workplace Education, January 1996.
- Jurmo, P. and Folinsbee, S. Collaborative evaluation: A handbook for workplace development planners. Don Mills, Ontario: ABC CANADA, 1994.
- Jurmo, P. et al (26 other adult educators from across the U.S.). Reinventing the NWLP. Recommendations for the National Workplace Literacy Program submitted in November 1994 to the U.S. Department of Education in conjunction with the reauthorization of the Adult Education Act. East Brunswick, NJ: Literacy Partnerships, November 1994.
- Jurmo, P. Workplace education: Stakeholders' expectations, practitioners' responses, and the role evaluation might play. Washington, D.C.: National Institute for Literacy, 1994.
- Jurmo, P. Education in the new workplace. Literacy at Work, April 1994.
- Jurmo, P. "Functional context" vs. "general" literacy: A false dichotomy? A two-part article written for the 1993 and 1994 issues of the International Reading Association's literacy newsletter.
- Jurmo, P. "Continuous quality improvement" for adult literacy efforts: How we might borrow an idea and strengthen what we do. A background paper for conference of New Jersey Association for Lifelong Learning, October 1994.
- Jurmo, P. Re-thinking how to plan and evaluate workplace education programs: Innovations in New York State. Albany, NY: New York State Education Department, 1994.
- Jurmo, P. Foreword to Growing Together: Improving Your Literacy Program through Student Participation: Syracuse, NY: Literacy Volunteers of America, 1994.

- Jurmo, P. Review of British educator Jane Mace's Talking about literacy: Principles and practice of adult literacy education for Adult Education Quarterly, Fall 1993.
- Jurmo, P. Who wants what information -- and how do we get it?: Issues in workplace education evaluation. Paper presented at the conference of the Texas Community and Technical College Workforce Literacy Consortium, Dallas, May 1993.
- Jurmo, P. A team approach to evaluation and planning: Handbook for workplace educators in a changing workplace. Albany, NY: New York State Education Department, 1992.
- Jurmo, P. Understanding lessons learned in employee basic skills efforts in the United States: No quick fix Basic Skills for the Workplace. Toronto: Culture Concepts, May 1991.
- Jurmo, P. The Freirian model. Development Communication Report, 1990/1.
- Jurmo, P. Exporting Worker Democracy. Workplace Democracy, quarterly of the Association for Workplace Democracy, Washington, DC, Fall 1984.
- Jurmo, P. and Roemmele, L.A. New paradigms for a new economy: Challenges for New Jersey adult educators. Background paper for the conference of the New Jersey Association for Lifelong Learning, Edison, NJ, March 1995.
- Sperazi, L. and Jurmo, P. Team evaluation: A guide for workplace education programs. Washington, D.C.: National Institute for Literacy, 1994.
- Sperazi, L. and Jurmo, P. Team evaluation: Case studies from seven workplace education programs. Washington, D.C.: National Institute for Literacy, 1994.
- Sperazi, L., Jurmo, P., and Rosen, D. Participatory approaches to evaluating outcomes and designing curriculum in workplace education programs: The report of the 1991 evaluation of the Massachusetts Workplace Education Initiative. Newton Center, MA: Evaluation Research, 1991.
- Sperazi, L. and Jurmo, P. Workplace education: Voices from the field Proceedings of the September 1991 National Workplace Literacy Program project directors conference. Washington, DC: U.S. Department of Education, November 1992.
- Uvin, J. and Jurmo, P. Contextualized ABE/literacy: Workplace education. Adult Learning special issue on policy, May/June 1996, Vol. 7, No. 5.

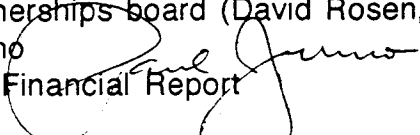
APPENDIX C

Final Financial Report

Learning Partnerships

14 Griffin Street
East Brunswick, NJ 08816-4806
Tel. 732/254-2237

TO: Learning Partnerships board (David Rosen, Art Ellison, Leslie Shelton)
FROM: Paul Jurmo
SUBJECT: Final Financial Report
DATE: 7/9/01



Attached are financial records (income, fees and tax payments, and other expenses) for Learning Partnerships since its beginnings in late 1996 through June 2001. Because LP served as the fiscal agent for VALUE (the national organization for adult learners) from 1997 through May 2001, these records are divided into two categories: VALUE-related funds and non-VALUE related funds).

As of today, LP's account has a balance of \$2327.50. I ask your permission to pay those remaining funds to me as a fee for work I did for LP during 2000 and 2001. I had held those funds in reserve to avoid a bank service charge while I was managing VALUE's funds until VALUE was able to open its own account. I will pay income taxes on this payment.

The LP account had these totals:

Income:	\$194,734.12
Debits (including fee and tax payments and other expenses):	
	<u>\$192,406.62</u>
<u>Balance:</u>	<u>\$2327.50</u>

The LP tax returns have been prepared each year by Mary Engebetson, accountant at Affordable Business Services, 1642 Van Dyke St., St. Paul, MN 55119-4233, 651-774-1946. Receipts and bank records are on file.

Other items of note:

- **Income:** Funding came from many sources. These will be summarized in a separate report which will present LP's accomplishments, problems, lessons, and possible follow-up actions.
- **Fees and taxes:** Paul Jurmo's gross salary for the four years in which he earned one for LP averaged \$23,413.74 per year. Other fees were paid to an accountant and to several people working for VALUE.

- **Other expenses:** Other expenses can be broken down as follows:

Telephone/fax/e-mail: $\$11,320.50 (V) + \$5,599.90 = \$16,920.40$

Postage: $\$3,028.50 (V) + \$1,894.52 = \$4,923.02$

Printing: $\$2,134.60 (V) + \$2,632.59 = \$4,767.19$

Supplies: $\$1,413.11 (V) + 1,775.50 = \$3,188.61$

Transportation: $\$5,762.83 (V) + 6,015.54 = \$11,778.37$

Hotel: $\$9,411.67 (V) + 3,585.86 = \$1,997.53$

Meals: $\$6,205.86 (V) + 462.32 = \$6,668.18$

Fees: $\$10,426.96 (V) + \$3,554.46 = \$13,981.42$

Equipment: $0(V) + 2,509.99 = \$2,509.99$

Utilities: $0(V) + \$180.48 = \180.48

Rent: $0(V) + \$478.43 = \478.43

Other: $\$10,131.98 (V) + 0 = \$10,131.98$

- LP has no working equipment or other capital goods to be liquidated. The equipment charges consist of monthly equipment rental fees and payments to a repairman (for repair of the printer).

I am happy to explain any questions you might have on anything related to this financial report.

Summary of Accounts for Learning Partnerships (non-VALUE and VALUE): 1996-2001

INCOME		Income
LP(non-VALUE)		\$77,878.55
VALUE		\$116,855.57
Total		\$194,734.12
DEBITS		
VALUE fees & taxes		\$46,493.52
LP fees & taxes		\$47,161.42
Total		\$93,654.94
VALUE other expenses		\$70,062.05
LP other expenses		\$28,689.63
Total		\$98,751.68
Total debits		\$192,406.62
BALANCE		\$2,327.50