# Building Partnerships for Adult Learner Success

## A Toolkit

MINNESOTA STATE

January 2023

## Minnesota State Strategic Framework

Minnesota State Colleges and Universities play an essential role in growing Minnesota's economy and opening the doors of educational opportunity to all Minnesotans. To that end, we will:

- **Ensure access to an extraordinary education for all Minnesotans**
  Our faculty and staff will provide the best education available in Minnesota, preparing graduates to lead in every sector of Minnesota's economy. We will continue to be the place of opportunity, making education accessible to all Minnesotans who seek a college, technical or university education; those who want to update their skills; and those who need to prepare for new careers.

- **Be the partner of choice to meet Minnesota's workforce and community needs**
  Our colleges and universities will be the partner of choice for businesses and communities across Minnesota to help them solve real-world problems and keep Minnesotans at the leading edge of their professions. Our faculty and staff will enable Minnesota to meet its need for a substantially better educated workforce by increasing the number of Minnesotans who complete certificates, diplomas and degrees.

- **Deliver to students, employers, communities and taxpayers the highest value / most affordable option**
  Our colleges and universities will deliver the highest value to students, employers, communities and taxpayers. We will be the highest value / most affordable higher education option.

## Equity 2030

In 2019, Minnesota State set a critical goal to eliminate the educational equity gaps at every Minnesota State college and university – a goal that will require both intentional systems and culture change and innovation, as well as advocacy and leadership with partners and stakeholders across the state to accomplish.

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# Introduction

This toolkit is designed to be a practical collection of resources and wisdom from the field, to be used by new and existing partnerships aiming to increase the success of adult learners. It arises out of collaborative efforts from around Minnesota and was driven by the work of Minnesota State's *All Learning Counts, Minnesota* initiative, funded by The Lumina Foundation, MSPWin, and the Center for Economic Inclusion. Specifically:

- **Who:** The toolkit is primarily intended to serve community-based organizations (CBOs), Adult Basic Education (ABE) providers, and colleges involved in helping adult learners prepare for and succeed at their college and career goals. Other partners, such as employers and labor unions (who operate apprenticeship programs) may also find the toolkit helpful.

- **What:** Specifically, the toolkit is aimed at helping these partners develop successful "adult pathways partnerships." Definitions and activities vary, but generally adult pathway partnerships involve deep and ongoing collaboration between partners to provide adult learners a coordinated set of education, training, and support services that support an on-ramp to college and lead to college credentials and career success.

Partnerships serving adult learners are not new. Many committed employees of colleges and community partners have been supporting under-represented adult learners. But much of this work was done quietly and in the shadows of our organizations without intentional policy and procedure support. Each effort was in isolation. The toolkit is an attempt to bring a spotlight to these innovative strategies and to create a community of practice in serving under-represented adult learners. Minnesota State cannot provide learner-centered solutions without partners.

- **Why:** The overarching goal of this work is to foster and strengthen partnerships that increase adult learner success and eliminate disparities in outcomes. This means taking a "learner-first" perspective dedicated to **meeting adult learners where they are**, understanding their needs and strengths, and helping them to navigate their own unique journey toward their educational and career goals.

- **Where:** The tools and best practices gathered in this document come from work being done around Minnesota in rural communities, small cities, and larger metropolitan areas. While some elements of the toolkit are Minnesota-specific, much of the toolkit will be relevant to partners across the country.

# Context + Concepts

## Why Adult Learners, and Why Now

Minnesota faces twin challenges of increasing demographic change in the students who will be graduating high school and continued labor force shortages. This creates a challenge for Minnesota and Minnesota State as Minnesota State is tasked with serving the workforce needs of the state and provide access to higher education to all Minnesotans.

To address these challenges, adult learners must be recruited, retained, and often reenrolled in our institutions to provide both individual opportunity and success and build a prosperous and talented Minnesota workforce.  This fits with the core commitments and core value of Minnesota State:

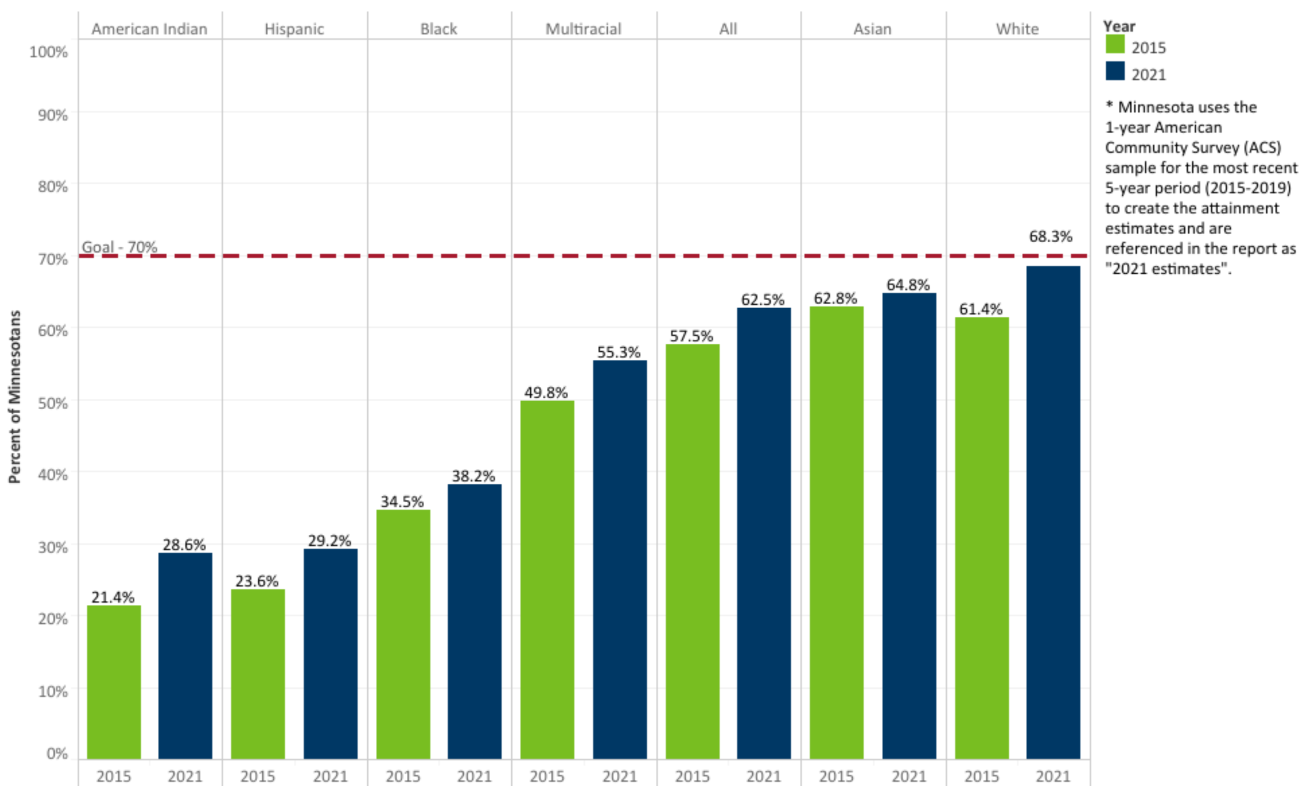
> *The core commitments of Minnesota State Colleges and Universities are to ensure access to an extraordinary education for all Minnesotans, be the partner of choice to meet Minnesota's workforce and community needs, and deliver to students, employers, communities, and taxpayers the highest value/most affordable higher education option.*
>
> *It is the core value of the Minnesota State Colleges and Universities to provide an opportunity for all Minnesotans to create a better future for themselves, for their families, and for their communities.*
>
> *Collaboration and partnerships are especially important for serving under-represented adult learners – those with social and economic barriers to education and employment due to income, race, ethnicity, language, health, and other life circumstances.*

High quality careers increasingly require education beyond a high school diploma that may be a Career and Technical diploma, an associate's degree, four-year degree, professional certification, or training that does not result in credit. Minnesota State, as noted above, has a critical role in providing an array of opportunities to Minnesota residents and provides educational opportunities in broad and diverse fields at different levels of post-secondary education.

The Minnesota Legislature has set an ***Attainment Goal*** of 70 percent of those age 25 to 44 will obtain a post-secondary certificate or degree by 2025. Minnesota has some of the highest educational attainment rates in the nation, but it also has some of the largest gaps in educational attainment between racial and ethnic groups. Overall, Minnesota needs to increase the percentage of Minnesotans in the age range by about 8 percent. However, the disparity between racial and ethnic groups is large. The Minnesota Office of Higher Education tracks these data and created the figure below for Educational Attainment in 2021. All ethnic and racial groups have seen an increases in the percentage of the relevant population with post-secondary degree or certificate, but the overall rates vary from 68.3 percent of white Minnesotans in the age range have a degree or certificate down to only 28.6 percent of American Indian/ Indigenous Minnesotans have a degree or certificate. Hispanic and Black Minnesotans are also noticeably lower in terms of the percentage as well.

### Educational Attainment 2021

*Overall Educational Attainment of Minnesotans Age 25-44, by Basic race Groups**

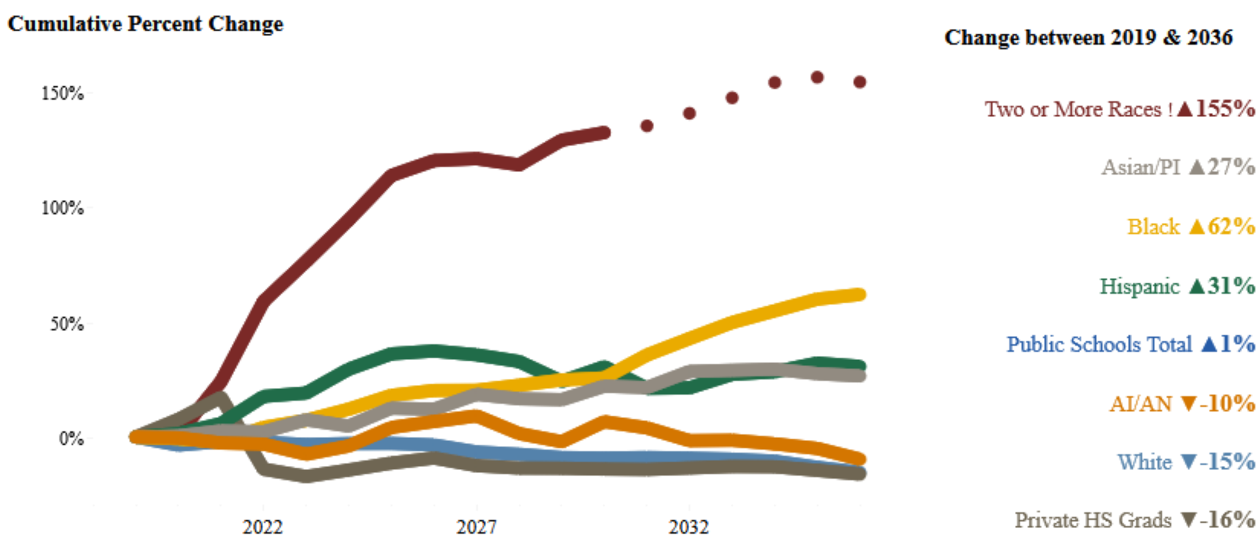



Minnesotans should achieve post-secondary awards similarly across racial and ethnic lines. While this data includes those who earned their awards as young adults, to meet these goals and achieve equity, adult students must be engaged and enrolled.

Adding to the challenge of increasing the number of adults with post-secondary awards is that Minnesota, like much of the nation, is undergoing significant demographic change. The Western Interstate Commission Exchange (WICHE) provides estimates of high school graduates in a regularly updated report, *Knocking at the College Door*, and currently projects estimate that the number of high school graduates in 2037 will decline by 206,970 students compared to the number of graduates in 2019. Within that overall number is a more significant change in the composition of high school graduates by race and ethnicity. White and American Indian/Alaskan Native (AI/AN) high school graduates will decline the most nationally with AI/AN high school graduate declining by 28 percent and white high school graduates declining by 19 percent. In the same period, students of two or more races will increase by 81 percent, Asian & Pacific Islander (Asian/PI) by 24 percent, and Hispanic students by 9 percent.

Minnesota is likely to see less of a decrease with projections suggesting a decrease between 2019 and 2036 of only 450 fewer high school graduates overall. However, the demographic changes in race and ethnic categories are still going to be significant with white high school graduates declining by 15 percent and American Indian/Alaskan Native (AI/AN) graduates declining by 10 percent over the same period. Graduates identifying as two races or more are expected to increase by 155 percent, Asian/PI students by 27 percent, Black students by 31 percent, and Hispanic Students by 31 percent.

### Demographic Changes Among Minnesota High School Graduates, 2019-2036



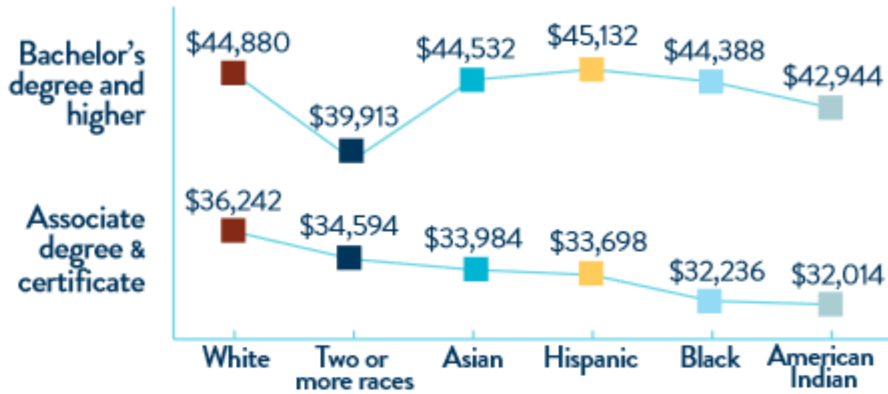

! Two or more race values for SY 2030-31 to 2035-36 are estimates and not a fully projected value.

Efforts are underway to increase the number of non-white students attending post-secondary education immediately after graduation, but with these demographic changes Minnesota will need to continue to improve access to non-traditional students in those demographic areas who do not attend post-secondary institutions directly after high school to achieve the Minnesota goals.

While the overall goals are critical to the economy of the State of Minnesota, they are also critical to social mobility and personal financial security. Both the 2008 Recession and the Coronavirus pandemic have also demonstrated that those without post-secondary awards are the most vulnerable to downturns in the economy with those with high school or less being the most likely to be laid off. The Minnesota Higher Education research indicates that racial disparities in income and full-time employment rates tend to decrease among graduates with higher degrees.

**Income Disparities by Race and Educational Attainment**

*Racial disparities in income and full-time employment rates tend to decrease among graduates with higher degrees.*




Median full-time annual wages in 2nd year for the graduating classes of 2011, 2012, and 2013. Age range at time of graduation: 19-30

Potential adult students benefit personally and financially from earning a post-secondary award and so will the State of Minnesota. Adult learners bring a host of skills and experiences to employers including leadership skills and a willingness to learn and adapt.

Minnesota is looking at a shortage of 317,000 workers in the next couple of years according to RealTime Talent, but in addition to this overall deficit there is a mismatch of credentials for those jobs that require post-secondary awards with areas such as health care and the trades facing significant demand for workers without sufficient workers with the appropriate skills to meet that demand.

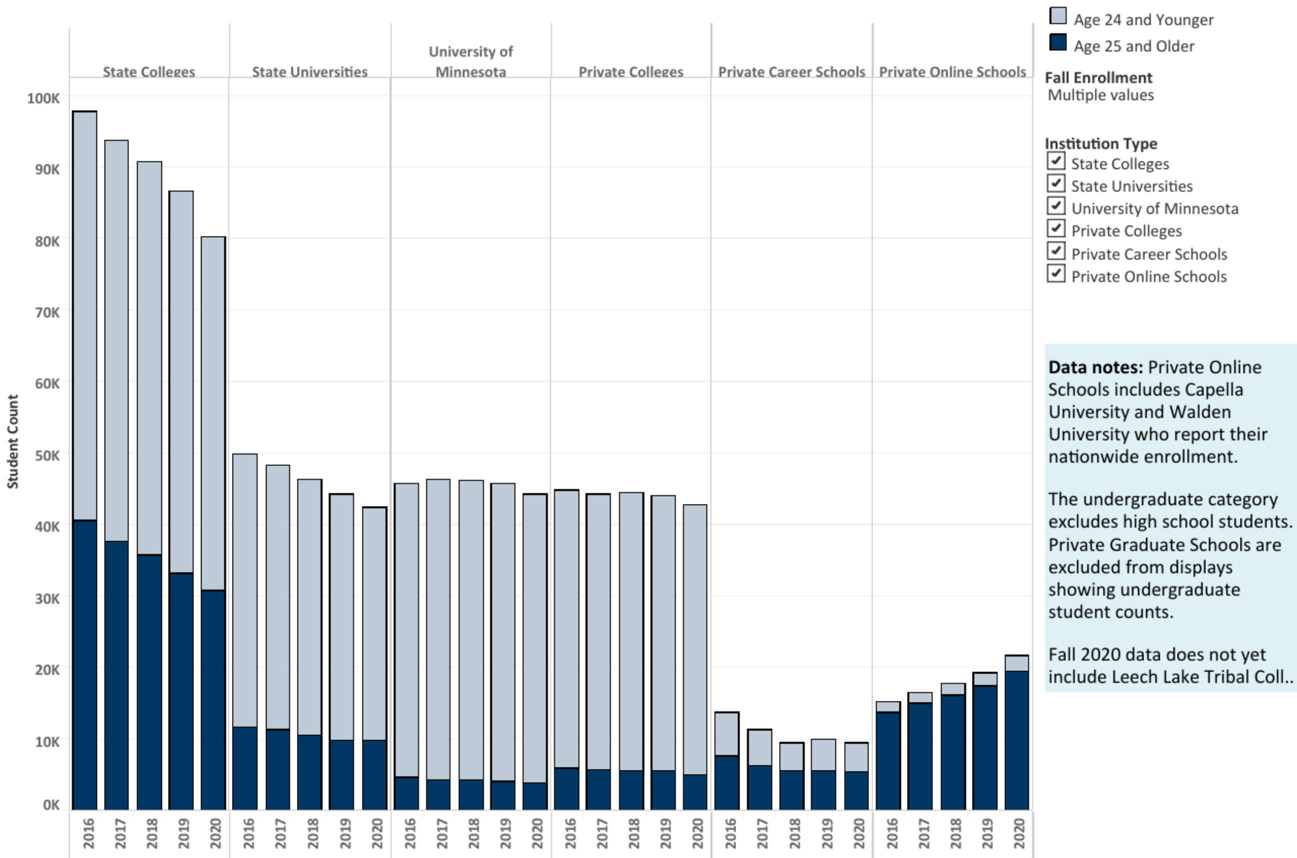
Most Americans do not transition from high school to college and leave four years later with a degree. The new reality looks dramatically different. Today, students over the age of 25 are the new norm; at last count, nontraditional students accounted for more than 40 percent of all US undergraduate enrollments. These workers are critical to Minnesota's future economic success.

Further, these students will be critical to the future of Minnesota State institutions. As the demographics of Minnesota continue to become more diverse and there are more people who enter colleges and universities at lower rates directly out of high school, Minnesota State will need to rely on adult students to maintain academic programs and institutions. Since 2016, both colleges and universities in the Minnesota State Colleges and Universities system have seen consistent declines in enrollment further exacerbated by pandemic decreases. This suggests more adults will not have a post-secondary award as we go forward. Men continue to lag women in enrollment in post-secondary education as well and rural students lag those in suburban and urban areas. Recruiting, retaining, and reenrolling those who do not finish a post-secondary award is essential to reaching these demographic groups.

Students age 25 and older do find state colleges particularly attractive with adult learners composing a higher percentage of students along with private career schools and private online schools compared to four-year institutions of all types.

### Minnesota Undergraduate Enrollments by Age and Institution Type, 2016-2020

*The percent of undergraduates age 25 and older is higher at State Colleges, Private Career Schools, and Private Online Schools that at other institution types.*




Source: Minnesota Office of Higher Education

Recruiting adult learners will require Minnesota State Colleges and Universities to improve their recruitment of adult learners as well as provide learning and life support geared towards students who often have many more responsibilities and constraints than students directly out of high school.

## Adult Learner Pathways

This toolkit exists to help partners work together to strengthen *adult learner pathways* to postsecondary success and careers. In this toolkit, we're using *adult learner pathways* to describe a broad collection of strategies, from career pathways to credit for prior learning, that share a few common attributes:

- **They are adult-learner centered**. This means they are singularly focused on adult learner success, empathetic to the adult learner experience, and consider adult learners' unique and varied needs and strengths.
- **They situate their efforts within the context of a broader educational pipeline**. They are therefore concerned with creating a coherent educational experience that is streamlined and easily navigable. They are focused not only on improving specific parts along the pathway, but also on how the pieces fit together.
- **They are collaborative.** Partners acknowledge the complexity of the task and that they can't go it alone and that part of serving adult learners is serving their holistic needs, including connections to support services, employment services and more.

## Specific Strategies We'll Cover

For the purpose of this toolkit, we are most interested in the point(s) along the adult learner pathway that connect to college and, in particular, credit-bearing programs that lead to postsecondary credentials and degrees. As such, we are interested in:

- How colleges and other training providers can align curriculum and instruction to create seamless educational experiences tailored to adult learner's academic needs.
- Creating more opportunities to acknowledge, assess, and award prior learning through innovations in assessment and placement and through credit for prior learning (CPL) strategies.
- Helping adult learners navigate the college journey, providing holistic navigation and support services and improving partners' responsiveness to adult learner needs.

Accordingly, the toolkit touches on several key concepts and strategies:

**Career Pathways.** The federal Workforce Innovation and Opportunity Act (WIOA) defines career pathways as, combination of rigorous and high-quality education, training, and other services that:

(A) aligns with the skill needs of industries in the economy of the State or regional economy involved;
(B) prepares an individual to be successful in any of a full range of secondary or postsecondary education options, including apprenticeships;
(C) includes counseling to support an individual in achieving the individual's education and career goals;
(D) includes, as appropriate, education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;
(E) organizes education, training, and other services to meet the particular needs of an individual in a manner that accelerates the educational and career advancement of the individual to the extent practicable;
(F) enables an individual to attain a secondary school diploma or its recognized equivalent, and at least 1 recognized postsecondary credential; and
(G) helps an individual enter or advance within a specific occupation or occupational cluster.

**Credit for Prior Learning.** (See page 101.) Credit for Prior Learning (CPL) is the evaluation and assessment of learning gained outside a traditional academic environment for college credit. Educators assess the knowledge, skills, and abilities acquired by students through work, professional training, military education and occupations, and other learning experiences.[1]

**Integrated (or Co-Requisite) Instruction.** A set of curriculum alignment and instructional strategies that allow students to take entry-level college courses simultaneously with remedial academic support. Integrated instruction can help by motivating students who would otherwise need to complete a sequence of one or more remedial courses before getting to college-level material.

**Guided Self-Placement and Other Assessment Strategies.** (See page 91.)
Guided Self-Placement (GSP - also known as Informed Self-Placement) includes tools or processes that allows students, in consultation with counselors, advisors, or other faculty and staff, to determine suitable coursework including the appropriate mathematics, reading, English, and English as a Second Language (ESL) course. Guided Self Placement may also include a placement recommendation by a training or education partner supporting a pathway to college.

**Navigation and Wrap-Around Services.** (See page 41.) Navigation and wrap-around services are a key component of adult learner pathways. Navigation should support an individual's journey through the pathway and provide "roadmaps" outlining the education and training that must be completed and

[1] Minnesota State system, CCCPL Team Report, 2015

credentials that must be earned to reach identified career goals. Each learner has an individualized academic and career development plan that shows the unique steps a student will take to reach his/her ultimate goal. Navigation includes:

- Career assessment
- Academic and career counseling, planning, and navigation
- Academic support, including tutoring
- Social support, including referrals to resources and services
- Transition planning to employment or postsecondary education.

Wrap-around services address life issues that may occur during an individual's journey along an adult learner pathway. Navigation may include ongoing assessment of need for assistance in a variety of areas such as childcare, transportation, and financial aid.

# How to Use This Toolkit

## About the Toolkit and *All Learning Counts*

The toolkit is a collection of practical tools, resources, tips, and lessons learned from various partners of *All Learning Counts*, including college faculty and deans, ABE instructors, community-based organizations, workforce development partners, and Minnesota State leaders and administrators engaged in adult learner pathways efforts.

The toolkit was developed through interviews with practitioners and stakeholders, research into promising practices in Minnesota and beyond, and by gathering and adapting various "tools" developed in the field that may be valuable to others.

### About All Learning Counts

*All Learning Counts, Minnesota* (ALC-MN) is a grant initiative, funded by The Lumina Foundation for Education focused on increasing the accessibility of college for under-represented adult students.

Led by Minnesota State office staff and a leadership team representing college and university departments, credit for prior learning experts, community partners and agency partners, ALC-MN was based on an analysis of past partnerships across the system serving low income and under-represented adult learners—and the specific obstacles, barriers, processes that seemed to prevent transition of adult learners from workforce and ABE education programs to college.

ALC-MN was designed to further Identify and address barriers and to pilot initiatives to inform policy and practice. A premise of ALC-MN was to support local learning in the form of targeted mini grants, create a community of practice through shared learning, and to use this learning to inform system change.

Specifically, ALC-MN focused on adult learner placement, administrative barriers, developing, or improving pathways into college and more. Initiative goals included:

- Increase equity of policies and practice related to adult learners, specifically low income and traditionally underserved populations.
- Identify policy and practice that may be limiting education access to specific groups.
- Move toward learner-centered approaches.
- Explore credit for prior learning practices through an equity lens – streamline and increase access to CPL for low income and traditionally-underserved learners.

- Increase collaboration and direct education pathways between work-based training providers and college/university programs.
- Increase collaboration with community-based organizations in serving the education and quality of life needs of adult students.

## Using the Toolkit

The toolkit is not meant to be read cover to cover, like a report. Though by all means, have at it! Instead, this lengthy document should be viewed as a collection of discrete tools, organized so the reader can quickly find a specific insight or resource that helps them kickstart their work. This is your toolkit—how you use it is up to you!

**A Living Document**

We intend for the toolkit to be a living document, adding and updating tools over time in response to the needs of practitioners in the field. As such, we are relying on you to contribute insights and work products you've developed in your own backyard.

» *The most up-to-date version of the toolkit, along with supporting documents and links, is available at* **https://www.minnstate.edu/system/asa/workforce/strategicpartnerships/toolkits.html**

If you have questions or ideas, or want to contribute something to the toolkit, please be in touch. You can contact Minnesota State staff, including:

**Jess Niebuhr** - Jess.Niebuhr@minnstate.edu
*Overall support, idea generation, connections to potential partners, connections to other staffs and more*

**Larry Handlin** – Larry.Handlin@minnstate.edu
*Overall support, curriculum alignment, trouble shooting and consultative support for adult learner assessment and placement and more*

**Jodie Swearingen** – Jodie.Swearingen@minnstate.edu
*Consultative support for pathway and curriculum alignment, including CPL and more*

**Mary Beth Lakin** – Marybeth.Lakin@metrostate.edu
*CPL crosswalks and development, connection to partners, system CPL policy, connections to CPL leaders across system and more*

**Charlotte Nitardy** – Charlotte.Nitardy@metrostate.edu
*CPL referrals, CPL advising, CPL advising for immigrants and refugees, and more*

**Toward a Community of Practice**

It is our hope that this toolkit can help support field-building efforts and the development of a community of practice around adult learner pathways. The toolkit can serve as a repository for best practices, lessons learned, and replicable tools, helping to elevate and amplify the good work going on around the state.

*We would like to thank the many individuals who contributed their expertise to this toolkit.* See page 121 for a list of contributors.

If you are interested in being a content expert to help update and contribute to this toolkit, please contact jess.niebuhr@minnstate.edu

# Building Partnerships

Partnerships to develop adult learner pathways can take on a variety of forms. Here are just a few examples:

- An Adult Basic Education (ABE) provider and a college aligning curriculum and instituting agreements to ensure that successful ABE participants place into specific college-level courses.
- A Community-Based Organization (CBO) collaborating with and a College and ABE to provide navigation and wrap-around services.
- A collection of colleges coordinating their admissions and placement criteria to ensure a local CBO can more easily prepare participants for a wider variety of postsecondary options.
- A college re-designing their credit for prior learning policies and procedures, and working with local CBOs and employers to find and support successful CPL candidates.

Despite this variety, in speaking to organizations involved in adult pathways partnerships around the state a number of common themes, considerations, and best practices emerge.

## The Big Picture

- **Take a Student-Centered Approach.** Partnerships that keep a disciplined focus on student success are more likely to find common ground, overcome obstacles as they arise, and build successful pathways responsive to student needs. Take a student-centered approach rather than a program-centered one, rooting every conversation in the idea that you're doing this work together with one big, common goal that benefits all parties. Make this commitment explicit through partnership agreements and guidelines.

- **Build Relationships and Trust.** There is no substitute for strong working relationships and mutual trust; it takes time and consistency to build these things, both within organizations and between or among them. They make partnership work more resilient, more creative, and more enjoyable.

- **Embrace Uncertainty and Maintain a Can-Do Attitude.** There is no cookie-cutter approach to adult pathways partnerships; many are doing new things that lack existing templates, clear procedures, or explicit policy guidance. It's important to cultivate some comfort with the uncertain, and perhaps even view it as an opportunity to think creatively and build new processes that better serve students and lead the way for others.

- **Lay the Foundation Early**. It takes time to establish a relationship and build trust, let alone designing and operationalizing a partnership. Partners indicate that a successful partnership can take up to five years to create from scratch. Plan to do a lot of the groundwork well before securing grant funding.

## Overcoming Challenges Due to Staff Transitions and Turnover

Staff transition and turnover is the main challenge cited by partners. The challenge is especially acute with regard to college deans, who often serve as the primary champion and "connective tissue" for a partnership within a college, but who typically have short tenures (around three years). It can be extremely difficult to sustain interest and effort in collaborations through these transitions. Ways to mitigate this risk:

- Within each organization, have more than one person who owns the project. Within the college, have additional staff or faculty take on a leadership role. In addition, get buy-in from, or create a substantive role for a president or vice president at the college.
- Create staffing/informational redundancy, share knowledge intentionally, and document processes and assessments. Document the project clearly at every step, and make sure someone has those notes and is deputized to shepherd the project in case of a staff transition. When feasible, develop a memo of understanding or contractual language that supports project goals and defines responsibility.
- Build long-term relationships.

## Increasing Coordination, Seamless Service, Removing Gaps

- **Align instructional calendars.** Coordination between colleges and community-based education and training (including ABE) can be hampered by misalignment between the various instructional calendars each uses. Every partnership should consider what will be most advantageous to students as well as what is feasible at their institutions.
    - CBOs and ABE should consider whether aligning to a semester-based schedule makes sense. Of course, aligning to the academic calendar can make pathways transitions for adult learners smoother. In addition, typically short-term, intensive trainings may be more accessible to adult learners if they are stretched across a semester, requiring fewer hours per week of class time. This can foster greater success among adult learners who work or care for family. Additionally, are there ways to take advantage of semester schedules – such as an intensive Spring/Summer program that prepares students for a Fall start.
    - Conversely, colleges should explore ways to make their coursework and curriculum more modular and stackable. Sometimes students benefit from shorter, more self-contained courses, allowing the student to progress along an educational pathway in smaller, more manageable steps at their own pace. Modular/stackable courses can also be easier to align with short-term community-based training, especially where those trainings might only have partial-credit equivalence. However, experience from the field shows that offering shorter-term, modular courses at colleges can be difficult due to a lack of policy support and procedural guidance.

- **Make Hand-Offs and Referrals Intentional.** Learners often fall off of pathways at the juncture points between service providers, much like how pipes often leak at their joints. We often think of a hand-off or referral as the end of a process, but we must always consider the longer journey that the student is on. A few strategies to consider:
  - **From "Bye!" to "Hi!".** Evaluate how you can help learners reach the next step of their journey, even if it's outside your organization. For instance, one college we spoke to had long been turning away learners with low scores on entrance assessments. They understood that Adult Basic Education was a better fit for these students, but weren't helping to make the connection. They realized this, and began proactively introducing low-scoring students to local ABE partners. While this might seem like additional effort expended on non-students, many of these students later enrolled at the college. There was a change of mindset: rather than thinking of low-scorers as non-college students, the college began to view them as "future college students" worth their time and care.
  - **Engage in Three-Person Meetings.** Rather than sending a student off to another program or office, expecting them to find their way independently, consider facilitating an introduction meeting between the student, yourself, and the new program. This simple step can help connect the dots and build relationships, ensuring the student is in good hands (and feels that way, too).
  - **Add "Follow-Up" to the Checklist.** Working with partners, develop simple processes to follow-up with students and/or partner organization staff to ensure the hand-off has been successful. This can be as simple as adding "follow-up" to your check-list of regular to-dos.

- **Develop Communication, Meeting, and Decision-Making Protocols.** Partnerships can be strengthened by setting expectations around the basic operations of the partnership. These kinds of protocols can be formalized in a partnership agreement (see page 30), but they need not be. Some suggestions include:[2]
  - Develop a process to gain input from all partners before making program decisions.
  - Rotate sites that host and lead meetings as a way to build familiarity and trust.
  - Plan role-specific meetings for administrators, instructors, navigators, etc., to help save time, keep discussions focused, and go in-depth.
  - Use digital communications like email, Zoom, or Slack between meetings to get feedback and workshop small issues as they arise.

[2] These recommendations are based on feedback from College Readiness Academy staff. For more information, see *College Readiness Academy (CRA): Program Evaluation Findings and Considerations.* The Improve Group. (August 2016). St. Paul, MN

# The Partnership Journey

Adult pathways partnerships can take a variety of shapes, and there are a number of ways to get a partnership up and running. But one thing is certain:

## These things take time.

Partners have indicated that this entire process, from relationship-building to completion and follow-up, can take up to three years. Partnerships that don't require curriculum changes generally take several months of collaboration and pathway building—even up to a year to formalize agreements. Partnerships that require curriculum changes at the college level will need to extend that timeframe by 12 to 18 months. If a partnership relationship is already established and/or if you're building off existing trainings/courses, it can still take up to two years to implement a new program.

It is important to consider constraints like the academic calendar, grant funding timeframes, and institutional timeframes for approving new programs and processes. Colleges often need longer approval turn-around times, and that work is often outside of normal job descriptions. Grant timeframes are often too short, so laying the foundation before securing grant funding can be helpful.[3] On the back end, follow-up grants are helpful to extend the work.

Generally speaking, here's what the journey can look like:

**Relationship Phase**

1. Identify your organization's objectives (both broadly and with regard to a prospective partnership)
2. Identify suitable partners, assessing their objectives, capacities, fit, and level of engagement.
3. Building trust, establishing effective working relationships, getting buy-in within organizations
4. Coming to consensus on the objectives and scope of the partnership, and how to measure success and collect relevant data
5. Identifying and applying for funding opportunities
6. Plan efforts to collect and share data and assess outcomes

**Alignment Phase**

1. Start with curriculum alignment (see page 73), by identifying learning outcomes and cross-walking existing trainings/courses.
2. Decide where equivalencies exist between learning outcomes, i.e., decide which learning outcomes lead to placement in (and/or credit for) which courses.
3. Develop new curriculum/instruction or augment existing training/courses to create tighter pathways, alignment and/or more well-articulated transitions from course to course.
4. Create assessments to place students, identify opportunities for credit for prior learning, and gauge learning outcomes within the curriculum.

**Construction Phase**

1. Develop the operational elements of the program: necessary staffing and infrastructure, calendars, navigation, support services.
2. Design and get approval for the necessary administrative processes, getting input and buy-in from the relevant offices along the way: enrolling/registering students, facilitating assessments and fees, awarding credit, transcripting grades. This step can often take longer than anticipated;

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[3] For instance, intensive collaboration among staff of the College Readiness Academy (a partnership between International Institute of Minnesota and Saint Paul College) began even before the grant funding for the program was secured. This early work built relationships and contributed to rapid program start-up once the grant was awarded and the program was launched. For further detail, see *College Readiness Academy (CRA): Program Evaluation Findings and Considerations*. The Improve Group. (August 2016). St. Paul, MN

college partners, in particular, often operate on fairly long timeframes for review and approval of new courses and processes; it is helpful to map these processes and their relevant timeframes/due-dates well in advance.

**Execution Phase**

1. Market the program and recruit students.
2. Enroll, assess, and place students.
3. Run the program and deliver instruction, assessments, supports, and navigation.
4. Address issues as they arise.
5. Ensure smooth transitions for students.
6. Execute processes around awarding credit, transcripting, etc., identifying and addressing issues along the way.

**Follow-Up Phase**

1. Examine the validity of assessments, make improvements to assessments as necessary
2. Assess the effectiveness of the curriculum and syllabus, make adjustments as needed.
3. Monitor and document outcomes in order to assess overall program effectiveness and to make the case for further partnerships and funding.
4. Gather lessons learned and best practices, refine the program, and execute it again.

# 10 Things that Can Derail Your Partnership

Speaking with college, CBO, and ABE partners engaged in adult pathways around Minnesota, a number of pitfalls came to light. It is important to anticipate these challenges and to work together to address them.

1. **Staff Transitions and Turnover.** This challenge was cited perhaps more than any other. Turnover among deans at Minnesota State Colleges is perhaps the most disruptive.
2. **Barking up the Wrong Tree**. Many partnerships report struggling to get off the ground because they are not able to find partners, or because it becomes clear that potential partners lack the capacity or motivation to engage in meaningful partnership. Some may even identify as competitors, even though without a partnership there is no overlap in the learners they serve. (See page 20.)
3. **Funding Lapses and Timing Issues.** Partners often rely on grant funding to build partnerships and plan pathways. Successful partnerships require a lot of lead time, but grant timeframes are often too short to accommodate that reality.
4. **Not Reaching Critical Mass.** Partnerships take a lot of work set up, and so a “critical mass” of students is often required to make a partnership worthwhile. For example, designing a new college course may be infeasible if only a handful of students sign up. Partnerships often struggle with finding a workable number of adult learners to serve.
5. **Conflicting Financial/Performance Incentives.** For instance, a CBO with organizational incentives to place participants in employment in the near term may struggle to engage in a partnership designed to engage learners in longer-term educational advancement. A college incentivized to graduate students might struggle in a partnership designed to transfer students to another institution.
6. **Unclear Policies and Procedures.** Policies and procedures, typically at colleges, sometimes do not provide mechanisms for partnerships to innovate in the ways they’d like to. Sometimes policy ambiguity can be an advantage (especially if administrators are flexible) but often it results in roadblocks to new approaches.
7. **Lack of Uniformity in Policies and Procedures.** This comes into play mostly when multiple colleges are at the table; colleges can differ significantly with regard to their policies and procedures, making it difficult to partner with more than one at a time. This can be a difficulty in the metro, where a CBO or ABE provider might want to create a training program that feeds into multiple colleges in the area.
8. **Partnership is No One’s Job.** For most partners, the work of building the partnership is ancillary to their main role. This means partnership activities can take a back seat to more immediate tasks and projects. Responsibilities are often spread across numerous offices and staff, which can make progress and accountability a challenge. Similarly, partnerships are often seen as side projects that fall outside of the main work of the organizations involved.
9. **Bridging Credit and Non-Credit Sides of the College.** Most colleges operate a “customized training” or “workforce solutions” side of the institution that focuses on building technical and vocational programs that are often short-term, non-credit-bearing, and designed to suit the needs of employers and industry. Many collaborations with CBOs naturally start on this side of the college. But as more partnerships move to offer college-level credit, CBOs often find it difficult to maintain engagement with the more academic, for-credit side of the institution. This can be for a variety of philosophical and process-oriented reasons.
10. **Weak Handoffs and Gaps in Service.** It is a challenge getting multiple organizations to effectively behave as a single entity providing seamless service and transitions for adult learners. Strong relationships, trust, and well-defined processes are crucial but take time to develop. Without them, outcomes can be underwhelming, which can undermine the partnership. (See page 12.)

# Making the Case

In building new adult learner pathways, often the first step is to make the case within your own organization. This is especially true at colleges and other larger organizations that serve a wide array of communities and needs or that have not traditionally had an adult learner focus.

**In making the case, strive to be student-centered.** The success of learners is one common thing that gets us out of bed in the morning, and it can be directly related to other concerns, such as business imperatives or the needs of the economy and employers. Simply put, what's good for student is good for the organization and is good for the community.

**New partnerships mean more work, so seek to energize and inspire.** Partners will admit that upping their game takes extra work, but many report that the new work is more rewarding, more creative, and more fun. The work can be a venue to connect more deeply with students or a change to build meaningful relationships with new colleagues. Make sure to be realistic about the work, but show others how their work will contribute to growth and success. And be sure to get input and buy-in early on and all along the way. Invite your colleagues to join you in taking ownership.

**Look for allies and think strategically about who to engage.** Think about the interests and incentives of colleagues within your college or organization, and consider their sphere of influence as well. Faculty are often a good place to start as they are most deeply connected to the student experience and tend to see themselves as advocates for students. Deans are also smart to engage early on given the scope and nature of their work. Engaging the admissions office around the benefits of increasing adult learner enrollments can also be beneficial. It can also be helpful to look for existing connections to external partners (employers, CBOs, etc.,) working with deans or vice presidents that are actively engaged in community relations and external partnerships.

## Student Success Arguments

The most compelling arguments for building adult learner pathways are the ways in which they can increase the success of those we serve. Adult learner pathways help students build on what they know, which affirms and rewards their hard work and past experiences, building their confidence and momentum. Adult learners are able to continue learning from where they're at, avoiding repetitive, redundant curriculum that can sap motivation, and engaging the learner with curriculum that is relevant to their current needs.

There are many studies demonstrating the impact of specific types of interventions and programming (such as credit for prior learning, intensive navigation, guided self-placement). Among them, general themes emerge around the benefits to students:

- **Students are more likely to achieve their postsecondary completion goals.** For instance, one study of 60,000 students showed that students earning CPL credit were more than twice as likely to earn a postsecondary degree.[4]

[4] Klein-Collins, R. (2010). Fueling the race to postsecondary success: A 48-institution study of prior learning assessment and adult student outcomes. Chicago, IL: The Council for Adult and Experiential Learning. SEE ALSO Hayward, M. & Williams, M. (2015). Adult Learner Graduation Rates at Four U.S. Community Colleges by Prior Learning Assessment Status and Method. Community College Journal of Research and Practice, 39:1, 44-54.

- **Adult learners benefiting from pathways have higher rates of retention, GPAs, and credit accumulation.**[5] For instance, one study found that corequisite remedial education doubled the rate of college-level gateway course completion for writing and quadrupled it for math.[6]

- **Adult learner pathways can help achieve more equitable outcomes.** For instance, the positive impact of CPL on student degree completion was twice as pronounced for Black students and four times as pronounced for Latino students, when compared to the average student impact.[7]

- **Students are likely to complete their college education in less time.** For instance, one study found that CPL-earning students earned four-year degrees 2.5-10 months earlier than non-CPL-earning students.[8]

- **Earning a degree in less time means lower tuition costs for the student, and better return on their investment.** For instance, CAEL estimates that students who hold CPL credits can save from $1,605-$6,000 over the course of their schooling, depending on the type of institution they attend and how much credit they have earned.[9]

## Better serving adult learners is good for college enrollments.

With enrollments generally in decline, colleges need ways to attract new students and ways to boost retention among existing students. Adult learner pathways that leverage innovations in guided self-placement, navigation, credit for prior learning, etc., can do just that. For instance:

- **The adult learner demographic is growing substantially** and encompasses a number of communities, from Veterans and service members to New Americans to displaced workers looking to re-train. All-in-all, nontraditional students account for nearly 40 percent of all US undergraduate enrollments.[10]

- **Colleges that position themselves as champions for adult learners are able to attract new student populations** and broaden their appeal to a greater audience.

- **Adult learners benefiting from pathways have higher rates of retention and credit accumulation.**[11] One study showed that CPL-earning students registered for and earned roughly 20 percent more college credits.[12] So while CPL or guided self-placement might be seen as sacrificing some enrollments in the short-term, over the longer-term enrollments actually increase due to increased student persistence.

- **Adult learners bring their valuable experience and relevant skills to the classroom.** They often exhibit remarkable leadership skills and motivation.

[5] Schutz, G. and Gibson, J. (2012, Fall). Promoting prior learning assessment policy: discovering evidences for state and institutional decisions. [Presentation.] Southern Association for Institutional Research Annual Conference.
[6] Is Corequisite Remediation Cost-Effective? Early Findings From Tennessee. Clive Belfield, Davis Jenkins, and Hana Lahr. CCRC Research Brief, Number 62. April 2016.
[7] Klein-Collins, R. (2010). Fueling the race to postsecondary success: A 48-institution study of prior learning assessment and adult student outcomes. Chicago, IL: The Council for Adult and Experiential Learning.
[8] Klein-Collins, R. (2010). Fueling the race to postsecondary success: A 48-institution study of prior learning assessment and adult student outcomes. Chicago, IL: The Council for Adult and Experiential Learning.
[9] Klein-Collins, R. (2011). Underserved Students Who Earn Credit Through Prior Learning Assessment (PLA) Have Higher Degree Completion Rates and Shorter Time-to-Degree. Research Brief. Chicago, IL: The Council for Adult & Experiential Learning.
[10] CAEL Credit for Prior Learning Brief, available at https://www.cael.org/lp/cpl-pla
[11] Schutz, G. and Gibson, J. (2012, Fall). Promoting prior learning assessment policy: discovering evidences for state and institutional decisions. [Presentation.] Southern Association for Institutional Research Annual Conference.
[12] Klein-Collins, R. (2010). Fueling the race to postsecondary success: A 48-institution study of prior learning assessment and adult student outcomes. Chicago, IL: The Council for Adult and Experiential Learning.

- **Stronger partnerships with community-based organizations helps enroll well-prepared students ready to succeed.** Not only are students more well-prepared academically, but they are also equipped with skills for thriving in college as a result of navigation assistance and other supports they receive.[13]

## Student Success is Good for the Bottom Line

Let's face it, decision-makers often respond to business arguments. Systems and organizations are constantly being asked to do more with less. So selling a new project might feel like swimming upstream. Thankfully, that's not always the case.

- **Investments in collaboration can be more cost-effective than business-as-usual, even if they require up-front investment.** For instance, a study of corequisite remediation found that it was significantly more cost-effective than traditional remedial education.[14] While the initial cost of corequisite education was slightly higher, the rate of student success was much greater, reducing the average cost per successful student by 50 percent for math and 11 percent for writing.

- **Savings to students from CPL, guided self-placement, and integrated instruction can be used by students to pay for additional college level credits.**[15]

- **Engaging in efforts to serve adult learners can avail organizations to grant opportunities and new funding streams.** In recent years, federal and state governments have realized the efficacy of pathways strategies and have joined funders like The Lumina Foundation, Complete College America, and others in supporting new efforts. Notably, a $2 billion Obama Administration grant package was aimed at leveraging credit for prior learning and other pathways strategies to support job training for displaced workers.

- **New assessments can bring in added revenue** from fees, offsetting the costs of creating and administering them, and potentially funding other elements of the partnership, such as release time for faculty.

[13] *College Readiness Academy (CRA): Program Evaluation Findings and Considerations.* The Improve Group. (August 2016). St. Paul, MN
[14] Is Corequisite Remediation Cost-Effective? Early Findings From Tennessee. Clive Belfield, Davis Jenkins, and Hana Lahr. CCRC Research Brief, Number 62. April 2016.
[15] *College Readiness Academy (CRA): Program Evaluation Findings and Considerations.* The Improve Group. (August 2016). St. Paul, MN

# Finding Suitable Partners

Finding the right partners is crucial to the success of any collaborative effort. When getting started, it's important to be thoughtful about why you want to partner, what you're looking for in a partner, and what you hope to accomplish together. Here are some questions to consider and tips to get you started.

## Important Questions: Start by Looking Inward

It's important to get specific about your organizational goals and capacities. Doing so will clarify what you're looking for in a partnership, help you communicate that clearly to prospective partners, and help you assess if a prospective partnership is a good fit. Specifically:

- **What are your objectives?** What are your organization's goals, both in broad terms and with regard to a prospective partnership? What specific outcomes are you hoping to achieve?

- **Who do you serve, and what are their goals?** Who does your organization serve, and what are their needs, motivations, and goals? For instance, do you serve a very specific community or population? If so, what specific needs or strengths do they bring to the table? Also, what are the goals of those you serve? For instance, are they primarily interested finding employment in the near-term? Are they interested in longer-term training? What are their motivations for engaging with you, and what does "success" look like to them? Are there specific gaps in services (or unaddressed needs) that you hope to address?

- **What are your current capacities, and which capacities are you seeking to develop or augment?** What do you do well that may benefit a prospective partner organization? What does your organization struggle with? What kinds of organizational capacities are you hoping to grow within your organization? What kinds of capacities might you be looking to "offload" to a partner organization that might be more well-suited?

- **Where do you fit in the "pipeline" or the broader "ecosystem"?** Here, it's helpful to take a learner-centered approach. Considering the entire "system" that the learner is navigating, where do you fit in? When a learner comes through your door, where are they coming from? Where have they been and what are they looking for? When they finish working with you, where are they headed? And how smooth are these transitions and hand-offs?

- **What is your organizational culture?** Does organizational leadership take an active approach to partnership? Do you anticipate organizational support for a new partnership, or will it take convincing?

## Envisioning the Ideal Partner(ship)

Once you've looked inward, you're ready to think about what to look for in a partner. Thinking about your ideal partner or a specific organization you're considering partnering with, ask the same questions above. This time, think about how your answers line up: in some cases, you're looking for strong alignment (i.e., the same answers from both partners); in other instances, you're looking for different but complementary answers. For example:

- **What are their objectives, and how do they align with ours?** While your organizations might have different overarching goals, it is important to be aligned on the goals of any prospective partnership. What specific outcomes do you both hope to achieve? Do clear and distinct roles emerge for each organization in achieving those goals?

- **Who do they serve, and what are their goals?** An ideal partner will serve a similar population, and/or have expertise serving populations you might currently struggle to serve. For instance, it might be very important to find a partner who serves the same geography as you, or who shares the same set of cultural competencies. On the other hand, you might want to differentiate the specific needs you serve among that population, so that each partner provides a different "piece of the puzzle" from the point of view of the participant.

- **What capacities does the partner have?** Here, it is often ideal to have very different, albeit complementary, capacities. For instance, your partner might be great at training, but lack support services. Training might not be your strong suit, but perhaps you have lots of experience with supporting individuals and helping them navigate their journey. These complementary capacities provide fertile ground for a strong partnership. However, important questions about your role(s) and goal(s) need addressing. In this example, are you seeking to branch out into training and curriculum development, "importing" some of the expertise and capacity of your partner? Or, is the idea for each organization to "specialize" on their unique strengths, with a focus on strong coordination and hand-offs?

  In any case, it perhaps goes without saying that it is also important for partner organizations to share a set of baseline administrative capacities that will aid the partnership. This includes, for example: the ability to execute contracts and facilitate payments as needed, staff time/capacity to meet regularly around partnership development and maintenance, and the ability to deliver on agreed-upon deliverables.

- **Where does your partner fit in the "pipeline" and in relation to your organization?** For instance, you might be working side-by-side in the same segment of the pipeline, but providing differing (and complementary) services. Or, you might represent two adjacent parts of the pipeline, with one organization's work feeding directly into the other. In either case, always consider the student's perspective. How can your organizations minimize friction and smooth-out hand-offs, providing a seamless experience for the learner?

- **What is your partner's organizational culture, and is it a good fit with your own?** Culture can be hard-to-define, yet it is all-important. The most important considerations are openness to partnership (and putting time and resources behind it), having a creative, can-do mindset, and taking a student-centered-centered approach in everything. Secondary considerations include willingness to share credit (and accountability), the organization's brand identity, and the amount of legitimacy and/or trust the organization has in the community.

## How to Find Partners

Some partners expressed a desire for a partnership clearinghouse or "white pages" or perhaps a sort of "dating app" for finding organizations open to partnership. Until those tech solutions come to fruition, the best way to find suitable partners remains good, old-fashioned networking and relationship-building. Still, where to start? Here are some tips:

- Start with your existing networks. Think about the "connectors" in your network—individuals who interface with other organizations or parts of the training and education ecosystem. These might be individuals with roles in external relations, community engagement or systems coordination, individuals who've been involved in past system efforts or collaborative workgroups, colleagues with years of experience in numerous roles at a variety of organizations, or simply your colleagues who seem to be social butterflies.

- Engage or investigate specific venues that often bring people together. Organizations involved in these venues are often those most interested in collaboration. Examples include:
    - **Local Workforce Boards**, which bring together community organizations, K-12 and postsecondary education, employers, labor unions, and elected officials to oversee workforce and education programming locally. https://mawb-mn.org/
    - **The State Workforce Board**, which guides system alignment and policy development and represents a similar array of partners as the local workforce boards. https://mn.gov/deed/gwdb/
    - **Minnesota State Centers of Excellence,** which drive innovation and coordinate postsecondary educational pathways in specific high-demand, high-skill industries around the state. https://www.minnstate.edu/coe/index.html
    - **Conferences**. Shared professional development opportunities remain rare between college, CBO and ABE partners. Meetings and conferences focused on economic and workforce development will often include a range of staffs from different agencies, as well as industry specific events, such as those sponsored by industry associations. One major conference to pay attention to is the first week of November each year. The CTE Works! conference is well attended by potential partners.
    - **System Office Staff and All Learning Counts Leadership Team**. Workforce development staff at the system office (contacts on page 9) are working to create a more consultative approach to local partnership support and often can assist in making referrals and connections.
    - **Chambers of Commerce**. Local, regional and state Chambers of Commerce are increasingly focused on workforce development. Meeting with chamber staff often can provide connections to others working with adult learners or looking to develop programming to support adult learners. Additionally, making these connections helps reinforce to these key employer advocacy organizations the importance of serving adult leaders as a means of meeting their members talent needs.
    - **Programs Similar to Yours**. Contacting those who offer similar programs can build relationships and be a way to meet others providing similar services. Prior to making these connections, sketch out how your planned program has unique capacity or could benefit others, e.g. a program that is a pathway into college does not compete with college, but is a collaboration.
    - **Employers**. Your current employer partners have relationships with colleges, other CBOs, or ABEs. Employers are a *very* influential match maker!
    - **Others**. There may be others in your network who can make suggestions. A quick review of your LinkedIn connections or a brainstorm with colleagues will likely result in suggested connections. Don't worry about asking others to help make connections. This is good work.

- Meet with prospective partners in-person and on-site. This will help you better understand what they do, give you a feel for their culture, and help build the relationship. Always look for organizations and staff who keep their focus on student success.

- Look for win-wins and low-hanging fruit. It can be helpful to review a college or prospective partner website so you know their language and focus areas.

- Look for existing alignment on training content and industries served. For instance, it can be easier to get started if both partners are already training towards the same industry-based credentials. It can also be helpful if your existing trainings are designed to be stackable or modular, or flow into a variety of credit- or credential-based educational pathways. For example, many workforce and education providers are offering entry level technology certifications, such as CompTIA A+. On first blush, this can feel "competitive" to prospective partners, but when A+ is supported with college readiness instruction it can be adult learner pathway that provides a jump start for adult learners.

- The colleges and universities of Minnesota State have a variety of orientations with regard to external partnerships. Colleges that are highly engaged in continuing education, customized training, and credit for prior learning (check their websites) are often apt to engage in new partnerships. Most colleges have an information line that can help you connect to the right people on campus. If you don't know where to start a good place to begin is the content area dean or the Office of the Academic Vice President.

# Partnership Who's Who: Roles + Perspectives

If you're gearing up to partner, it's helpful to understand those you plan to partner with. What are their roles (both day-to-day and with respect to the partnership)? What concerns or questions might they have? What are their underlying interests?

For instance, non-college partners often see colleges as a black box—complicated organizations with lots of moving parts and opaque policies and procedures. And colleges may not understand the benefits of partnering with ABE and CBOs, content to continue business-as-usual.

To partner effectively, partners need to understand each other, address each other's concerns, and build trust. This section seeks to kick-start that process by shedding some light on each partner's roles and perspectives. *Use this section to better understand your current and prospective partners.*

## Community-Based Organizations (CBO)

CBOs often identify as the "project manager" in an adult pathways partnership. Their role can involve a wide variety of things, including:

- Designing training partnerships in high-demand fields that balance the needs of colleges and their academic processes with labor market demands and employer hiring processes.
- Providing holistic navigation, career navigation, and case management services for learners, including providing or identifying wrap-around services.
- Identifying funding sources, procuring training dollars, managing grants and reporting outcomes.
- Recruiting and developing close relationships with students.
- Providing a wide array of education and training services, including core work skills, basic academic skills, occupational and technical skills, on-the-job training, and internship opportunities.
- Focus on providing job placement and job retention services, including working directly with employers.

**CBO Perspectives and Challenges**

- CBOs often express an unfamiliarity—both among their staff and their participants—with the inner-workings of colleges, especially on the academic and credit-bearing side of the college. This can include admissions, financial aid, academic processes (especially around placement, transfer, earning credit, and graduation requirements).
- CBOs are often funded by a rotating patchwork of grants and other funding sources, each with their own goals and (often relatively short) timeframes. This can make long-term planning, staffing, and commitment to a specific partnership difficult. CBOs may not be aware of or able to work within the longer timeframes that colleges often work on.
- CBOs want to contribute to the long-term skill-building of their participants, but they often also face incentives to place participants into employment in the short-term. These goals are often in tension, often due to funding requirements.

## Adult Basic Education (ABE)

Serving over 50,000 individuals per year in Minnesota, ABE increasingly situates itself as a primary "on ramp" for adult learners into postsecondary education and career pathways.

ABE serves individuals 17 or older who are not enrolled in the K-12 system and who either lack a high school diploma (or equivalent) or functions below the 12th grade in basic academic areas such as reading, writing, or math. ABE is funded by state and federal funds, and services are provided through a network of 39 consortia across Minnesota via school districts, community-based organizations, and the correctional system. In addition to basic academic skills, ABE often covers other content areas, such as employability, study skills, financial literacy, and critical thinking, among others.

Many ABE providers embed basic skills education into a career-focused curriculum, helping learners earn high school equivalency while simultaneously working toward industry-based credentials and college credit. This model is often built around collaborative "integrated instruction" that places a college faculty or industry expert in the classroom alongside the ABE faculty.

ABE's ability to function as an on-ramp to further educational opportunities relies on deep collaboration with college, CBO, and employer partners. Many ABE providers also strive to provide navigation services, often in collaboration with a CBO partner.

**ABE Perspectives and Challenges**

- ABE instructors are often motivated by a desire to serve others and may be likely to go "above and beyond" on behalf of the students and adult pathways partnerships.
- ABE instructors seeking partnerships with colleges can sometimes feel like they are "banging on the door" trying to get the institution to partner, especially on the credit-bearing side. Colleges who would like to partner with ABE need to take steps to open the door.
- ABE instructors appreciate greater transparency around college policies and procedures, as they may be unfamiliar with the inner workings of colleges.
- ABE instructors sometimes sense that college faculty are hesitant and/or unfamiliar with how to form partnerships; for this reason, ABE instructors often seek partnerships with Customized Training on campus, which traditionally is not credit-bearing.
- ABE instructors appreciate having dedicated space on campus for instruction, dedicated time for office hours, and time for relationship-building with faculty.
- In Minnesota, ABE often aligns with the School District's calendar, which is not the same as the college's. ABE programs should try to ensure that teachers on campus are on the campus schedule and not the school district calendar so that students have access to them
- Many college faculty still view ABE as only providing services to help students obtain a high school diploma when the services provided have evolved over the past decades and include transitioning adult learners to postsecondary. ABE instructors can be valuable support to learners as they transition to college and even in their first classes.
- A number of specific things can help ABE staff feel welcome on a college campus:
    - Providing ABE instructors on campus a college/university email address
    - Providing ABE instructors with support and mechanisms for addressing nuts-and-bolts issues (like getting a white board or extra classroom chairs)
    - Inviting ABE instructors to the campus "New Teacher Orientation"
    - For specific pathways, provide ABE instructors with course outlines and learning objectives of gateway courses. Meet with ABE instructors to share readiness expectations and flexibility.
    - Giving ABE instructors access to D2L
    - Facilitating connections between ABE instructors and assessment/placement staff at the college so that when individuals come in to test or place, they can be immediately connected to ABE staff if they don't meet the college requirements. ABE can work with them to help them enroll.

## Colleges

Generally speaking, the role of the college in an adult pathways partnership is to provide learners with academic and technical skills that are rigorous and real-world relevant, and which lead to college credit and credentials. This includes:

- Curriculum and instructional design aligned to clear learning outcomes, subject to standards required for academic accreditation.
- The development and administration of assessments both for the purposes of placement into college as well as for the awarding of college credit and degrees.
- Managing various complex processes, including admissions, enrollment, transcripting and the awarding of credits and credentials, financial aid, managing student accounts and fees, etc.
- Providing facilities for instruction, labs, clinicals, etc.

**College Perspectives and Challenges**

- Colleges may experience internal tension between "academic" and "vocational" points of view.
- Colleges generally work with longer timeframes than CBOs and ABE with regard to the review and approval of new programs, partnerships, and processes. For instance, Minnesota State uses a different contract management system than K-12 school districts, and the Minnesota State system requires more advance notice than many collaborators to engage faculty, use space, etc.
- Colleges are intent on upholding rigorous academic standards, and thus may be wary to partner with external training providers, especially in arrangements that award credit or provide placement into credit-bearing programs. They will expect rigor and explicit commitments from external training providers with regard to ensuring learners' college readiness.
- College funding is derived in large part from enrollments, so colleges will be more interested in partnerships that have the potential to bring in larger numbers of students. They may not be interested in partnerships that only yield a handful of new students.
- College learning has traditionally taken place in the college classroom, and therefore some colleges may discount the value of experiential learning and other non-traditional venues for building college-level competencies.
- Colleges offer a number of academic programs. It is important to note that these programs have their own admissions and placement criteria that are more stringent than the college itself. It is important that partnership staff and adult learners understand this distinction. Being accepted to a college does not automatically imply acceptance into a specific academic program.
- Colleges generally look more favorably toward partnerships that can serve large numbers of students, thereby generating a greater return on their investments. For instance, if a pathway can only bring in 3-4 students per semester, a college may be wary of spending time and money creating new courses, assessments, processes, et cetera. Potential partners should be able to demonstrate that they can recruit and deliver a substantial number of students each semester.

It's important to note that colleges are large, complex organizations with a variety of faculty and staff each with distinct roles, perspectives, and concerns. Moreover, every college (even within the Minnesota State system) has a different structure, different policies and procedures, and different goals and interests.

**College Faculty**

Faculty lead the development, alignment, and execution of curriculum and assessment. They have a high level of autonomy, though their work generally requires a dean's support and is also subject, to varying degrees, to the oversight of program advisory councils. Some faculty also act as "Program Directors" overseeing specific academic programs, including their course requirements and admissions standards.

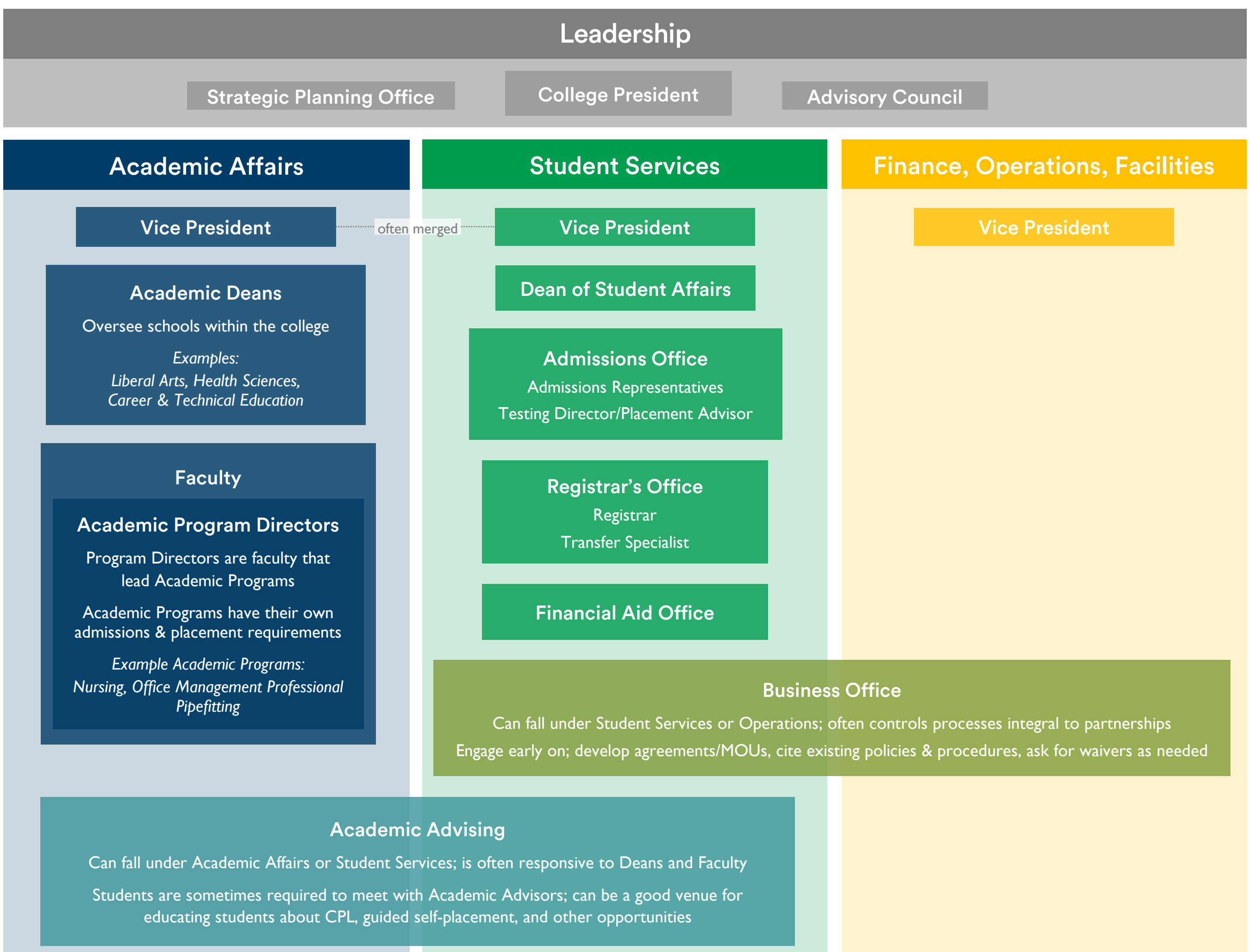
**Faculty Perspectives and Challenges**

- Faculty often see themselves as the primary advocate for students on campus. They often take a student-centered approach, and are likely to be more receptive to partnerships that have a similar approach.
- Faculty with experience in partnerships, credit for prior learning, guided self-placement, and other similar adult-learner-centered approaches can often assume a leadership role on campus as champions and mentors.

- Faculty roles and responsibilities are highly-specified by contracts. There is an expectation among faculty, and their Union representatives, that any work beyond that stipulated in their contract needs to be compensated. In other words, faculty are often protective of their time, and may be wary of taking on additional partnership responsibilities (e.g., relationship-building, curriculum alignment, assessment development) without release time and additional funding. Accordingly, faculty should be brought into partnerships early on; their role is critical and if they are not on-board, a partnership can easily fizzle.
- Faculty own the intellectual property of their syllabi and curriculum, and may be protective about changing or exporting these things at the behest of external partners.
- Faculty view themselves as the experts in pedagogy and in their fields of expertise. They may initially lack trust in external partners and may be wary to collaborate as their interest is to maintain a high level of rigor around instructional practices and learning outcomes.
- Faculty may work with operational offices, such as the registrar, on transactional, day-to-day tasks, but they are not usually expected to work with such offices on deeper planning and process development efforts. Deans usually lead and facilitate those efforts with faculty input as needed.
- Faculty might not understand their roles in new processes like credit for prior learning and guided self-placement.

### A Highly-Generalized College Organizational Chart

Every college is different, and most make detailed organizational charts available on their website. This highly-generalized version, focused mainly on offices and staff relevant to adult pathways partnerships, is designed to help non-college partners get a quick sense of how a college might be organized.



**Academic Deans**
Deans help connect the dots. They manage faculty, teaching, advising, and course scheduling. Deans often interface with a wide array of offices, individuals, and interest groups—including faculty representatives—on campus, and their role is often to balance the interests of those groups while making progress on day-to-day operations and broader strategic initiatives.

**Dean Perspectives and Challenges**
- Deans are salaried and the scope and nature of their work is relatively flexible.
- Being a dean is a difficult job, and average tenures for Deans are often short—as short as three years.
- Deans often play a central role in an adult pathways partnership, acting as a "project manager" for the College. Often, the development of a new pathway, procedure, or partnership will require the approval of a dean.
- Because of the central role Deans play and the possibility of turnover, partnerships are often at risk of stagnating when a dean transitions away from their role. Partners report that, even with fully executed partnership agreements in place, partnerships often fade after a dean or other campus champion moves on.

**Student Services Deans**
The structure and role of these positions is very similar to those on the academic side, but they manage the staff and processes categorized as student services – often counseling, advising, admissions, financial aid and student activities staffs.

**Placement Advisors/Admissions Staff**
Admission staff works with prospective students by providing campus and program information, and details on the campus admission process.  Placement advisors are typically part of the front-end team that evaluates incoming student placement into the proper math, reading, and writing course levels. They also assess whether students need to be assessed as English language learners.
- The group manages the requirements for acceptance to the college/university and special requirements for some programs.
- The level of academic college readiness and individual student developmental education requirements are determined here based on multiple measures and/or student-guided self-placement.
- Staff in these positions should be aware of campus-specific agreements with Community-Based Organizations at a general level so they are able to speak to processes incoming students may need to be aware of to make a smooth transition into a college program.
- If a student is admitted to the campus using Ability to Benefit criteria, this team will need to communicate with the financial aid office and other departments as determined by the campus's Ability to Benefit process.

**Registrars/Transfer Specialist**
Registrar staff is responsible for student records such as transcripts and degree audit reports. Registrations, satisfactory academic progress, transfer, program exceptions, enrollment and graduation verifications, and conferring program/degree completion are some of the processes that flow through this area of campus.
- Staff in these positions need to be notified of course equivalencies or industry certifications to credit work that is developed at the campus to be able to code student transcripts and audit reports accurately.
- As much as possible, this work should be standardized across campuses and universities to aid in transfer among campuses to ensure students are being granted credit appropriately and consistently.

- Potentially part of the campus Ability to Benefit process—adding a cohort code for tracking students.

**Academic Advisors**

The structure and specific duties of advisors vary among campuses, but this group can be very important to the success of students. The advising team typically picks up after the admission process has been completed and students are ready to register for their first courses and attend new student orientations. Many times, this group is engaged throughout a student's lifecycle and is available for student guidance and/or referral to other support systems. Advisors typically act as a guide for students to assist them through various college processes, including guidance on their academic program and graduation requirements as well as understanding their transfer credits and credits for prior learning.

- Advisors should encourage, teach, and help students develop a realistic education plan and ensure academic program aligns with career goals.
- Advisors typically act as a guide for students to assist them through various college processes.
- Advisors should be aware of campus and system-level policy, procedure, and processes related to prior learning and course placement to be an effective guide and advocate for students.
- Advisors should be aware of agreements related to the programs they advise as well as where information can be accessed related to all campus or system level agreements to assist any student on campus.
- Academic Advisors may be a key support provider for campuses for Ability to Benefit students.

**Financial Aid**

- This office helps students apply for, and awards, student financial assistance.
- This office determines student eligibility for federal, state, and institutional student financial assistance.
- Student financial assistance includes grants, scholarships, loans, and student employment.
- Sources of student financial assistance include federal, state, and institutional funds, as well as funds from organizations outside the college.
- Validates student Ability to Benefit status and determines financial aid eligibility.
- Manages Ability to Benefit coding in ISRS.

**Business Office**

Most important for students, this office takes care of charges and payments for student accounts, mainly tuition, fees, and housing. This office also handles the disbursement of excess financial aid funds to students after financial aid applies to their accounts. They also manage the campus finances including purchasing, accounts payable, and budgets for the campus.

# Roles and Agreements

Agreements are an important milestone for any partnership. They help clarify roles and expectations, codify shared objectives, philosophies, and outcomes, clarify accountability and financial relationships, and spell out details of process, data collection, and program requirements.

## Agreement Ingredients

A partnership agreement can go by many names ("memorandum of understanding" or "letter of intent," for example) take many forms and serve many purposes depending on the nature of the partnership at hand. On the following pages you will find examples of two varieties of agreement. Some are fairly legalistic; others are quite informal.

Whatever the case, partnership agreements often contain some common elements:

- **Recitals.** Usually toward the start of the agreement, these are "findings" or statements of fact that often lay out the rationale for the partnership, common challenges and objectives, and the strengths and interests of the parties involved. In some cases, recitals can include citations of relevant state statutes, organizational by-laws, or institutional policies.

- **Definitions.** Any agreement will define important elements of the partnership, including the partners themselves, the name of the partnership, and the date(s) and timeframe of the agreement.

- **Partner Responsibilities.** A critical part of any agreement, the document should lay out the specific roles and expectations for each party. This includes shared responsibilities as well as responsibilities unique to each partner, as well as roles and mechanisms for problem-solving issues and addressing partner needs as they arise. It can also include specific outcomes that each partner is expected to achieve—for instance, a certain level of academic attainment that a partner will help students achieve.

- **Partnership Parameters.** Anything central to the partnership's operations should be spelled out in detail here, from important timeframes to student eligibility criteria to specific resources partners will bring to the table.

- **Lawyerly Stuff.** Most agreements, especially those that define new programs, bring physical resources and facilities to bear, or that serve human subjects (learners!) will also require a number of clauses of a legal nature. These can include:
    - Relevant laws and specific actions partners will take to stay in compliance with them (and, what happens if a partner falls out of compliance). This often includes:
        - The Americans with Disabilities Act (ADA)
        - The Family Educational Rights and Privacy Act (FERPA)
        - The Minnesota Data Privacy Act
        - Educational ADA compliance, data sharing
    - Attestations that each partner has required professional, liability, and or general "umbrella" insurance.
    - Clarifications about the specific liabilities of each partner.
    - Clauses that clarify how the agreement can be amended and how partners can exit the agreement.
    - Detailed descriptions of financial arrangements and other financial considerations.
    - Recognition that contracts with colleges and universities are subject to the rules of Minnesota State government purchasing.

## Partnership Agreement Example #1: CBO-College Readiness/Placement

Here is an example of a partnership agreement **between a Minnesota State College and a CBO providing ABE, college and career readiness, and navigation services** with the goal of ensuring all students in the CBO's educational program are ready for college. The agreement articulates that the completion of the ABE college readiness program allows students to enter the College at college-level in reading and writing. This agreement provides a sense of the roles and responsibilities of the partners, and the general contents and structure of a partnership agreement. Feel free to use this example as a starting point for your own partnership agreement.

**Adult Pathways Partnership Agreement**

This Agreement is entered into between the State of Minnesota, acting through its Board of Trustees of the Minnesota State Colleges and Universities, on behalf of ___________ College (hereinafter "College/University"), and __________ (hereinafter "Facility")

This Agreement and any amendments and supplements thereto, shall be interpreted pursuant to the laws of the State of Minnesota.

**WITNESSETH THAT:**

1. WHEREAS, the College/University has established academic program for qualified students preparing for and/or engaged in career placement; and
2. WHEREAS, the Board of Trustees of the Minnesota State Colleges and Universities is authorized by Minnesota Statutes, Chapter 136F to enter into Agreements regarding academic programs and has delegated this authority to the College/University; and
3. WHEREAS, the Facility has a suitable preparation program for educational needs of academic programs(s) of the College/University; and
4. WHEREAS, it is in the general interest of the Facility to assist in educating persons to be qualified or better qualified personnel in the career of their choice; and
5. WHEREAS, the College/University and the Facility are desirous of cooperating to furnish an academic experience for students enrolled at the College/University;
6. NOW, THEREFORE, it is mutually agreed by and between the College/University and the Facility:

**COLLEGE/UNIVERSITY RESPONSIBILITIES**

1. The College/University, which is accredited by Higher Learning Commission, is responsible for offering academic programs.
2. The College/University will provide the Facility, at its request, with objectives for their academic programs. Implementation of those objectives will be accomplished by the College/University
3. The College/ University will waive developmental reading and writing coursework for students who successfully completed the Facility's educational program and were referred by the Facility.
4. The College/University will inform its faculty and students of the Facility's policies and regulations which relate to the partnership with the Facility.

**FACILITY RESPONSIBILITIES**

1. The Facility will prepare its students for college level coursework at the College/ University through its educational program, unless otherwise agreed to in writing by the parties.
2. The Facility staff will be responsible for identifying students that complete the Facility's educational program and are a good fit for the academic nursing program at the College. The students will attend the Facility's orientation for mentorship experience as deemed necessary by the College/University and the Facility.
3. The Facility will provide the College/University students who successfully completed the Facility's educational program and want to attend the College.
4. The Facility is responsible for the safety and quality of mentorship provided to the students who are participating in the mentorship program at the Facility. In order to effectively fulfill that duty, it is agreed that Facility has ultimate control over all persons involved in the program and may immediately terminate the participation in the program of any of the students enrolled in the program where an emergency exists involving health and safety; and in all other (non-emergency) instances, Facility shall consult with the College/University before taking any action to terminate the participation of a student.
5. The Facility will provide the College/University with a copy of its policies and regulations which relate to referring students to the academic program of their choice.
6. The Facility will allow a reasonable amount of Facility staff time for orientation and joint conferences with College/University staff/ faculty, for planning with College/University staff/ faculty, and for such other assistance as shall be mutually agreeable.

7. The Facility assumes no responsibility for the cost of meals, uniforms, housing, parking or health care of College/University faculty and students who are participating in the clinical experience program. The Facility will permit College/University faculty and students who are participating in the clinical experience program to use any cafeteria on the same basis as employees of the Facility. The Facility will permit College/University faculty to use Facility parking spaces under the same policies governing Facility personnel.
8. The Facility recognizes that it is the policy of the College/University to prohibit discrimination and ensure equal opportunities in its educational programs, activities, and all aspects of employment for all individuals regardless of race, color, creed, religion, gender, national origin, sexual orientation, veteran's status, marital status, age, disability, status with regard to public assistance, or inclusion in any group or class against which discrimination is prohibited by federal, state, or local laws and regulations. The Facility agrees to adhere to this policy in implementing this Agreement.

**MUTUAL RESPONSIBILITIES**

1. The College/University and the Facility assume joint responsibility for the orientation of the College/University staff/ faculty to Facility policies and regulations before the College/University assigns its faculty to the Facility.
2. Personnel of the College/University and the Facility will communicate regarding planning, development, implementation, and evaluation of the referral program. The communication may include but not be limited to:
    a. Communication to familiarize College/ University personnel with the Facility's philosophy, goals and curriculum;
    b. Communication to familiarize the College/University staff/ faculty with the Facility's philosophy, policy and program expectations;
    c. Communication to keep both parties and the parties' personnel who are assigned to the referral program informed of changes in philosophy, policies and any new programs which are contemplated;
    d. Communication about jointly planning and sponsoring in-service or continuing education programs (if appropriate);
    e. Communication to identify areas of mutual need or concern;
    f. Communication to seek solutions to any problems which may arise in the mentorship programs.

**STUDENT REQUIREMENTS**

1. Successful completion of the Facility's educational program.
2. Referral from Facility staff to the College/ University
3. Complete admissions and enrollment process for the College/ University

## Partnership Agreement Example #2: Certificates to Credit

Here is an example of a partnership agreement **between a Minnesota State College and a CBO to translate a CBO-awarded certificate of completion into college credit.** This agreement provides a sense of the roles and responsibilities of the partners, and the general contents and structure of a partnership agreement. Feel free to use this example as a starting point for your own partnership agreement.

**CERTIFICATES-TO-CREDIT PARTNERSHIP LETTER AGREEMENT**

This Certificates-to-Credit Partnership Agreement ("Agreement") is entered into by and between **CBO Partner ("CBO")**, a Minnesota non-profit and **College Partner** ("College"), of the Minnesota State college and university system. The CBO and College may be referred to herein individually as "party" or collectively as "parties."

CBO's flagship program, the ("Program") provides high school students an educational, curriculum-driven capstone experience to learn how to launch their own start-up business through original and curated content that provides practical skills and key entrepreneurial learning outcomes.

In the Certificates-to-Credits Program, College faculty conduct reviews of standardized curricular programs, training, and/or certification programs in non-collegiate settings, and evaluate assessment methods and standardized learning outcomes for potential award of college-level transfer credit.

Through collaborative discussions between CBO staff and College faculty, and following submission by CBO of requested curricular, program, and credential information and documentation, a formal Certificates-to-Credits review was conducted by authorized faculty to assess the Program for a university-level credit recommendation.

The joint review determined that student completion of the Program as specified in the agreement results in learning outcomes comparable to university level.

Therefore, the College will establish procedures through the Certificates-to-Credit partnership to award university credit to students successfully earning the Program certification. The CBO agrees to partner with the College under the terms and provisions contained in this Agreement to meet the requirements for students to be eligible for award of credit with the College.

NOW, THEREFORE, in consideration of the mutual promises and covenants herein set forth and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties, pursuant to the terms of this Agreement, do hereby agree to the following:

**PARTNERSHIP COMPONENTS**

The parties will establish a comprehensive process *for CBO students to be eligible* to *earn two lower- division elective-credits at College after successful completion of the agreed Program learning and assessment experiences*, as outlined herein:

1. Adult learners participating in CBO throughout MN and ND will be eligible for the Certificates-to-Credit partnership program when their CBO team successfully completes the projects, assessments, and scores of the agreed Program.
2. CBO will establish an application process for a Certificate of Completion that requires submission of a business plan company report and video commercial for review by a panel of experts (elements of the "Company of the Year" competition package). Because this is a team-based program, peer assessment of team involvement will also be a required element for completion.
3. Independent judges will review the Certificate application materials and assess learning via specified rubrics for both the company report and presentation of a commercial; learners must receive an average rating of 4 (80%) on both the company report and the commercial evaluations by the judging panel to be eligible for the Certificate of Completion for the partnership program.
4. Eligible CBO participants must complete the application process with CBO for the specified Program Certificate of Completion to be eligible for this credit-partnership program. The program-application will include any necessary signatures of participants to authorize sharing of pertinent learner-identification and CBO-participation information with the College, consistent with CBO policy, for this program only.
5. CBO will prepare an official Certificate of Completion for all learners who submit the program- application material(s) and are confirmed to meet the requirements. Duplicate copies of the certificates will be provided to College as notification of eligibility for credit, along with a full listing of students who are eligible, with identifying information to match the College's Visiting Student Application.
6. The College will develop a Visiting Student Application and procedure for students earning the Program Certificate of Completion, and provide instructions to CBO and students on applying. The application will provide Visiting Student status, and allow recording of the credits awarded in this agreement on an official university transcript. The transcript may be part of the student's subsequent degree-seeking admission to the university, or may be requested for transfer, in accordance with transcript-request procedures and fees.

7. CBO will provide eligible participants the procedure for applying to College with specific application directions and timing outlined. For this partnership program, learners must complete the CBO-College Visiting Student Application within twelve months of receiving the CBO Company Project Certificate of Completion.
8. Upon acceptance of a completed CBO-College Visiting Student Application and verification of completion of the Certificate of Completion and the CBO student's eligibility, the College will award each CBO applicant two credits of lower-division, elective, university credit through this agreement. Eligibility will be confirmed using the official CBO Program Certificate of Completion list; an official copy of the Certificate of Completion also may be requested for verification purposes.
9. CBO will track all Certificate of Completion applicants and resulting outcomes in records.
10. The College will maintain records of eligible students provided by CBO for verification purposes.
11. The College will communicate with learners who apply for credit once credit is conferred and will provide the process for obtaining a transcript.
12. The College will maintain documentation on curriculum review and credit award approvals.
13. The College will provide documentation to other institutions about the credit recommendation and credit award, to support credit admission or transfer at another institution.
14. The College will share the credit recommendation with institutions in the Minnesota State system and the Credit for Prior Learning Assessment Network (C-PLAN), consistent with system Transfer Policy and Procedure and Credit for Prior Learning Policy and Procedure.
15. The College will report the number of learners who received credit to CBO on an annual basis.
16. The Parties agree to review this agreement and process for credit-award every three (3) years for assessment of curriculum and learning outcomes. The CBO periodically updates materials for relevancy and effectiveness, and in the event there is more than 20 percent change incorporated into the program, the CBO will notify the College for reassessment.
17. Learners will have access to advising in regard to the CBO Program Certificate of Completion process through their CBO local Company Program facilitator and/or CBO staff.
18. Both organizations will provide learners access to general program information and to specific information about the deadlines and timeframes for applications for credit, and for use of university credit awarded.
19. The College will provide access to advising information about potential use of the learning and credit in prospective degree programs at the College.

**DISCLOSURE OF INFORMATION**

The College shall not, during the term of this Agreement or thereafter at any time, impart any confidential or proprietary information relative to the business or affairs of the CBO to anyone except those employees who are entitled to receive such information or to attorneys, accountants, or financial advisors for reasonable purposes. The provisions of this Paragraph shall survive the termination of this Agreement.

**STUDENT PRIVACY AND DATA RIGHTS**

The College will observe the Family Educational Rights and Privacy Act (FERPA) and Minnesota Government Data Practices Act (MGDPA), and act in accordance with University Policy 1040: Data Privacy, and any other applicable system or university policies and procedures on student data. The CBO will observe its organizational policy and practices on privacy and data, and will obtain student and parent/guardian permission for release to the College the specified information on eligible learners involved in the program under this agreement.

# Data Sharing: Why and How

Data is an increasingly valuable currency among partners. Still, many partnerships, and especially community-based organizations, overlook the value of data sharing—in part because it can seem daunting from a technical and legal standpoint. In this section, we provide some basic information about the benefits and ins-and-outs of data sharing.[16]

## Reasons to Share Data

Partners may seek to share data for a number of reasons:

- To learn more about a shared population, including their demographics, needs and barriers, and involvement in other programs. Accordingly, data sharing agreements are often most useful and desirable when the data flows in both directions between the partners, giving both a better picture.
- To aid program improvement, by helping partners learn more about participant outcomes and what works.
- To fulfill reporting requirements for grants and other funding streams.
- To demonstrate program effectiveness, contribute to a body of research, and make the case for additional funding.
- To entice partners who value data and add long-term value to the partnership.

## Data Sharing Considerations

**Discuss and Plan Data Sharing Efforts Early On**

Data sharing should not be an after-thought. There are good reasons why partnerships should consider data sharing early on in the partnership journey.

- First, data sharing takes planning and often involves collecting data at the very beginning of a project in order to establish a "baseline." If baseline data aren't collected early on, it can be difficult to later measure the programs impact.
- Second, data sharing requires "infrastructure," which can take time to set up. Here, we're talking about systems for collecting, storing, and transmitting data securely, databases (or at least spreadsheets) that facilitate the crunching of numbers, legal expertise required for authoring data sharing agreements and data release forms, staff training, et cetera.
- Third, by discussing and planning data sharing early on, partners can get more specific and disciplined about what they hope to accomplish, and this can strengthen the partnership and its outcomes.
- Fourth, by defining the data elements, in conjunction with program goals better formative and summative evaluation may be undertaken.

If you're planning to collect and share data, there are some broad things to keep in mind.

**Data Systems and Data Availability**

- **Start with data you currently collect.** It can be easy to "dream big" about the data you might collect and the analysis that might be possible. But it's always most feasible and cost-effective to start by reviewing and analyzing data you currently collect. You might be surprised what you can learn from data already available, and this can inform further data collection/sharing planning.
- **Cohort Codes and ISRS/Workday.** If you are a non-college partner working with a college, make sure to talk to the college about setting up a "cohort code" to flag your shared participants in their data system. Within Minnesota State, this data system is called the Integrated Student Records

[16] That said, we are not lawyers. While we'll touch on some legal considerations, we are not offering legal advice. Please consult your organizations' legal counsel early on if you plan to get into the weeds of data sharing. Another great resource is the Minnesota Department of Administration Data Practices Office, which provides resources, assistance, and advice on data practices. See https://mn.gov/admin/data-practices/

System (ISRS)—but will be replaced soon with the new Workday system. Setting up a cohort code facilitates the college's ability to pull data only for those students you are serving.

- **Minnesota's Statewide Longitudinal Data System (SLEDS).** SLEDS is a collaboration between the Minnesota Department of Education, Department of Employment and Economic Development, and the Office of Higher Education to connect data from K-12, higher education, and employers (employment and wage data). It provides a wealth of information publicly, and is a great resource if you're looking to collect data on your participants from across systems to better understand education and employment outcomes. You can learn more at http://sleds.mn.gov/

### Data Sharing Requirements

- **Data Sharing Agreements Are Necessary.** To share data, partners need to have a detailed data sharing agreement in place that demonstrates the partners' legal basis for collecting and sharing the data vis-à-vis the Minnesota Data Privacy Act[17], FERPA[18], and other applicable laws.
- **Student Consent is Required.** Each partner organization has the responsibility to obtain student consent for data collection and sharing (see page 39 for an example student data release form). Even if the student consents, there other legal constraints around how and why data are shared.[19] For instance, no personally-identifiable data can be shared with parties outside the data sharing agreement, including the public.
- **Data Sharing is Permissible Only for Certain Purposes.** Students who are jointly enrolled in an external agency and a Minnesota State institution may have their Minnesota State data pulled only for specific, legally-permitted purposes. One of these purposes is for evaluation, e.g., for grant reporting and/or program improvement.

### Data Sharing: A Cautionary Tale

*A community/technical college and a Community Based Organization (CBO) have started working on a joint project that allows students to earn CPL credit at the college based on some preliminary training that the CBO provided. Staff at neither organization has dealt with data sharing agreements in the past and they don't think to create one when they start working on this project.*

*The staff member at the CBO sends a spreadsheet over email to the college staff she has partnered with. The spreadsheet includes program participant names, race/ethnicity and age data, skill assessment scores, and instructor comments about his performance. The CBO's program participants have not signed a waiver that allows the data to be shared with the college.*

*The college staff member downloads the file, then posts it in a shared folder in Teams. Multiple people who are not part of the project can access it. When one of the college team members accidentally opens the file, she sees the name of someone she knows, along with his skill assessment scores and instructor comments about him. She knows that she shouldn't have access to this file, closes it, and doesn't say anything to anyone.*

Could this situation have been prevented? While you may have valid reasons to share data, organizations cannot share data, even for evaluation purposes, without the consent of those whose data is being shared.

[17] See https://www.house.leg.state.mn.us/hrd/pubs/dataprac.pdf for more information.
[18] See https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html for more information.
[19] One exception to this rule pertains to colleges within the Minnesota State system. For grant-funded projects that involve sharing data for evaluation purposes only inside Minnesota State, student consent is not needed.

## The Data Sharing Process

1. Come to mutual agreement about why your organizations need to share data; is there an existing data source that provides data to the public or professionals that doesn't require entering into a data sharing agreement – e.g., the SLEDS data system?
2. Assuming data sharing is about program evaluation, determine the minimum amount of data you need to share to successfully understand and evaluate your project
3. Meet to review and complete the data sharing agreement (DSA), ensuring that the DSA structure and content has the support of the legal teams at each organization (see section on Data Sharing Agreements)
    a. How will students provide consent to have their data shared, or is consent already provided in a standard process (e.g., when program participants enter a program and sign a data sharing waiver)?
    b. How will data be shared? If in a spreadsheet, how can it be shared securely, e.g., via Move It Securely? Contact your legal or institutional research team lead to find out the best way to securely share data. Use relevant policies and procedures.
    c. Who needs access to the data? The minimum number of people needed is preferred.
    d. What needs to be done to the data? Are there staff resources available to analyze and/or summarize the data? If not, when you hire a contractor to do this work, is there a clause in the contract that mentions how they will interact with data and keep the data secure during the life of the contract?
    e. Do entities outside of those listed in the DSA need to see a summary of the data? If so, are data for groups with a cell size less than ten hidden? (See section on IRB Considerations)
4. Have the appropriate legal and/or institutional research entities review the agreement; revise as needed

## Anatomy of a Data Sharing Agreement

To author a legally valid data sharing agreement, it is ideal to work with legal counsel with expertise in Minnesota data sharing practices. Most college campuses will have staff with these qualifications. Another good place to start is the Minnesota Department of Administration Data Practices Office, which provides resources, assistance, and advice on data practices. See https://mn.gov/admin/data-practices/

That said, here is a preview of the common elements of standard data sharing agreement:

- **Recitals.** These are references to applicable laws that demonstrate the partners' legal ability to collect and share data. These are often listed toward the beginning of the DSA.
- **Data to be Collected.** A data sharing agreement should be very specific about which data are to be collected and by whom.
- **Purpose(s) for Data Sharing.** Data sharing agreements need to specific about the purposes of the data sharing. Data privacy law stipulates the few legally permissible reasons data can be shared. One of the main reasons is for the purposes of reporting outcomes and program improvement.
- **Data Security.** An agreement must enumerate the many precautions partners will take to safeguard data once its collected to protect data subjects' privacy.
- **Consent.** An agreement must describe steps taken to ensure the consent of the subjects, using appropriate Tennessen warnings and release of information forms signed by students (or parents/guardians if applicable).
- **Timeframes.** An agreement will describe when data will be collected, how long it will be stored (there are laws around this), and how it will be securely destroyed.

- **Data Reporting.** Data sharing agreements detail data will be reported publicly within the bounds of Minnesota law and IRB Policy, and whether partners need each other's' permission to do so.
- **Contingency Planning.** Agreements will detail what happens if there is a breach in data security.

## Program Evaluation and Effective Practice

As we just mentioned, sharing data can be a venue for increasing a partnership's discipline about a program's design and intended outcomes. This can, in turn, help us improve program design and outcomes. Here are some questions to get you thinking scientifically about your work—questions that are useful regardless of whether you decide to pursue a robust data collection strategy:

- Given a partnership's objectives, what are the specific, measurable outcomes that can be assessed? What are the relevant "inputs", such as specific services provided, staffing, costs, etc.?
- How can we collect data that allows apples-to-apples comparisons across sites or over time?
- If we are interested in considerations of equity, how can we use data to understand how our work impacts different populations?
- How, precisely, do we define success?
- How, precisely, do we define our work, i.e., the "intervention" or services we are providing that we hope will lead to improved student outcomes?
- How are our participants doing when we first encounter them? For example, are they employed? What is their skill or educational level? What does their household income look like? These measures can be used to establish a baseline from which to measure program impact.

## A Note on Presenting Findings/IRB Considerations

If you intend to do research that will be presented to an external audience, you typically need to start by working with the Institutional Review Board (IRB) at the applicable higher education institution:

- **Data must only be presented to the public in "summary" form**, i.e., in terms of aggregates and averages that mask individual students' identities. Per Minnesota statute:

  > "Summary data," as defined in Minnesota Statutes, section 13.02, subdivision 19, means data which has been extracted, manipulated, or summarized from private or confidential data, and from which all data elements that could link the data to a specific individual have been removed. "Summary data" includes, but is not limited to, statistical data, case studies, reports of incidents, and research reports. Once it is summarized from private or confidential data, summary data remains summary if the responsible authority maintains any list of numbers or other data which could uniquely identify any individual in the summary data physically separated from the summary data and the responsible authority does not make such list or other data available to persons who gain access to, or possession of the summary data.

- In practice this means that such aggregate results can only be shared if they represent a group of 10 or more students. It is not allowable to share summary data for a group of less than 10 students since it may be possible for those students to be individually identified. This can be a challenge for small programs or programs hoping to present their data "disaggregated" into small subcategories of students (such as by gender and race).

- **You should present your research in narrow terms**, for instance as a pilot involving only specific organizations and from which you are gathering insights on specific research questions (such as the effectiveness of aligning curriculum). Similarly, make sure that you are not making overly-generalized claims from your research, i.e., you should not use the research to promoting a program as the path forward for all institutions or for all populations of students (in terms of race, gender, et cetera).

## Student Data Release Form

*This form can be used to obtain permission from an individual to have certain personal information shared between partners for specific, legally allowable purposes.* *See page 35 for more information.*

### AUTHORIZATION FOR THE RELEASE OF STUDENT INFORMATION

TO WHOM IT MAY CONCERN:

I, ____________________________________________________, hereby authorize (name of institution) ___________________________________ to release and/or orally discuss the education records described below about me to: _________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________.

The specific records covered by this release are: ______________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________.

The persons to whom the information may be released, and their representatives, may use this information for the following purposes:
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________.

I understand that the student records information listed above includes information which is classified as private on me under Minn. Stat. § 13.32 and the Federal Family Education Rights and Privacy Act. I understand that by signing this Informed Consent Form, I am authorizing the College/University to release to the persons named above and their representatives information which would otherwise be private and not accessible to them. I understand that without my informed consent, the College/University could not release the information described above because it is classified as private.

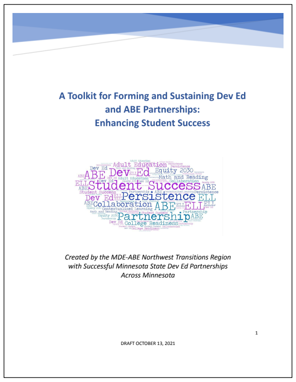
I understand that when my education records are released to the persons named above and their representatives, the College/University has no control over the use the persons named above or their representatives make of the records which are released.

I understand that, at my request, the College/University must provide me with a copy of any educational records it releases to the persons named above pursuant to this consent. I understand that I am not legally obligated to provide this information and that I may revoke this consent at any time. This consent expires upon completion of the above stated purpose or after one year, whichever comes first. However, if the above-stated purpose is not fulfilled after one year, I may renew this consent. A photocopy of this authorization may be used in the same manner and with the same effect as the original documents.

I am giving this consent freely and voluntarily and I understand the consequences of my giving this consent.

Dated: ______________________________
Signed: _____________________________

# Additional Partnership Tools and Resources




### A Toolkit for Forming and Sustaining Dev Ed and ABE Partnerships: Enhancing Student Success

https://atlasabe.org/dev-ed-abe-toolkit/

This Toolkit is a valuable resource to help train and support Minnesota State campuses and Adult Education programs in forming and sustaining a Developmental Education/Adult Basic Education (Dev Ed/ABE) partnership. The partnership model utilizes national and statewide best practices in collaborative teaching models to improve student outcomes for all students enrolled in development education courses.

This toolkit has been developed specifically for practitioners within the Minnesota State system and Minnesota Adult Basic Education (ABE). However, the practices and information contained in this Toolkit should assist anyone regardless of their campus or Adult Education program location.


### DOL Career Pathways Partnership Checklist

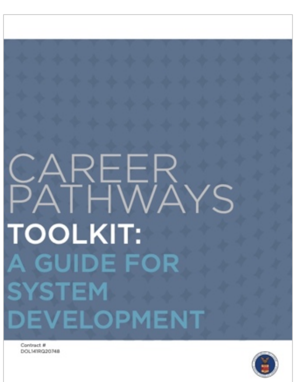
https://lincs.ed.gov/publications/topic/wioa/careerpathways-checklist.pdf

This checklist is helps determine the extent to which a program meets the requirements for career pathways in section (3)(7) of WIOA. It is intended for:

- Planners and managers of career pathways programs
- Financial aid counselors and administrators responsible for administering the Ability to Benefit (AtB) provisions of the Higher Education Act (HEA)

The checklist can be used to:

- Review each element (letters A–G) of the WIOA career pathway definition to ensure a program meets the required criteria.
- If the program meets a criterion, check the “Yes” box and describe the evidence demonstrating how the criterion is met.
- If the program does not meet a criterion, check the “No” box and describe what enhancements the program needs to make in order to meet the criterion.




### Career Pathways Toolkit, US Department of Labor

https://www.doleta.gov/usworkforce/PDF/career_pathways_toolkit.pdf

This revised Toolkit provides the workforce system with a framework, resources, and tools for states and local partners to develop, implement, and sustain career pathways systems and programs. Specifically, this toolkit lays out a series of steps partners can take, along with promising practices and how-tos. It is more focused on building career pathways systems, but has some insights for local partnerships as well.

This revised Toolkit acknowledges many of the U.S. Department of Labor’s (USDOL) strategic investments to create and sustain a demand-driven employment and training system as part of a larger national effort. It incorporates the Career One-Stop competency model as a building block for creating career pathway programs and references the Career One-Stop credentials Toolkit as an easy way to search existing industry-recognized credentials.

# Helping Adult Learners Navigate Their Journey

## Adult Learner Perspectives

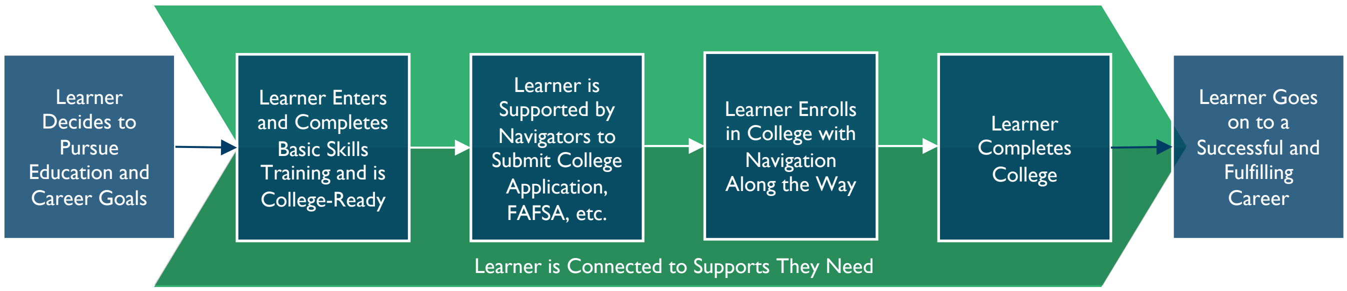
To better serve adult learners, we have to strive to understand their mindset and circumstances: their goals, the barriers they face, and how their past experiences with education and employment color their perspective. Of course, every adult learner is unique, and that is perhaps the first thing to keep in mind. Accordingly, approaches to serving adult learners need to be responsive and customized to the student. That said, a number of common themes emerge when considering adult learners:

- They are often balancing family and work responsibilities; day-to-day needs and obligations often preclude longer-term goals.
- They are more likely to experience barriers related to physical and mental health, housing, food insecurity, financial instability, and chemical dependency. They may also lack access to—or familiarity with—technology such as smartphones, laptops, and tablets.
- They are likely to have had negative experiences with education in the past, and have barriers related to literacy, numeracy, and study skills.
- They are likely to find academic programs at colleges difficult to navigate. They may lack familiarity with college processes and terminology, and how to navigate various offices on campus.
- They are likely unaware of college costs, particularly those above-and-beyond tuition, such as books and fees. Learners who have attended college in the past may have holds on their records due to unpaid account balances from the past or previous academic performance, and this is often the first thing they encounter when trying to enroll.
- They put a premium on convenience, cost, flexibility, and relevance.
- For immigrants and refugees, there is uncertainty about eligibility for financial aid and other forms of assistance, as well as uncertainty about whether credits and credentials from foreign institutions can be recognized by domestic colleges and employers.

## The Adult Learner Journey

We like to envision the adult learner journey looking something like this:

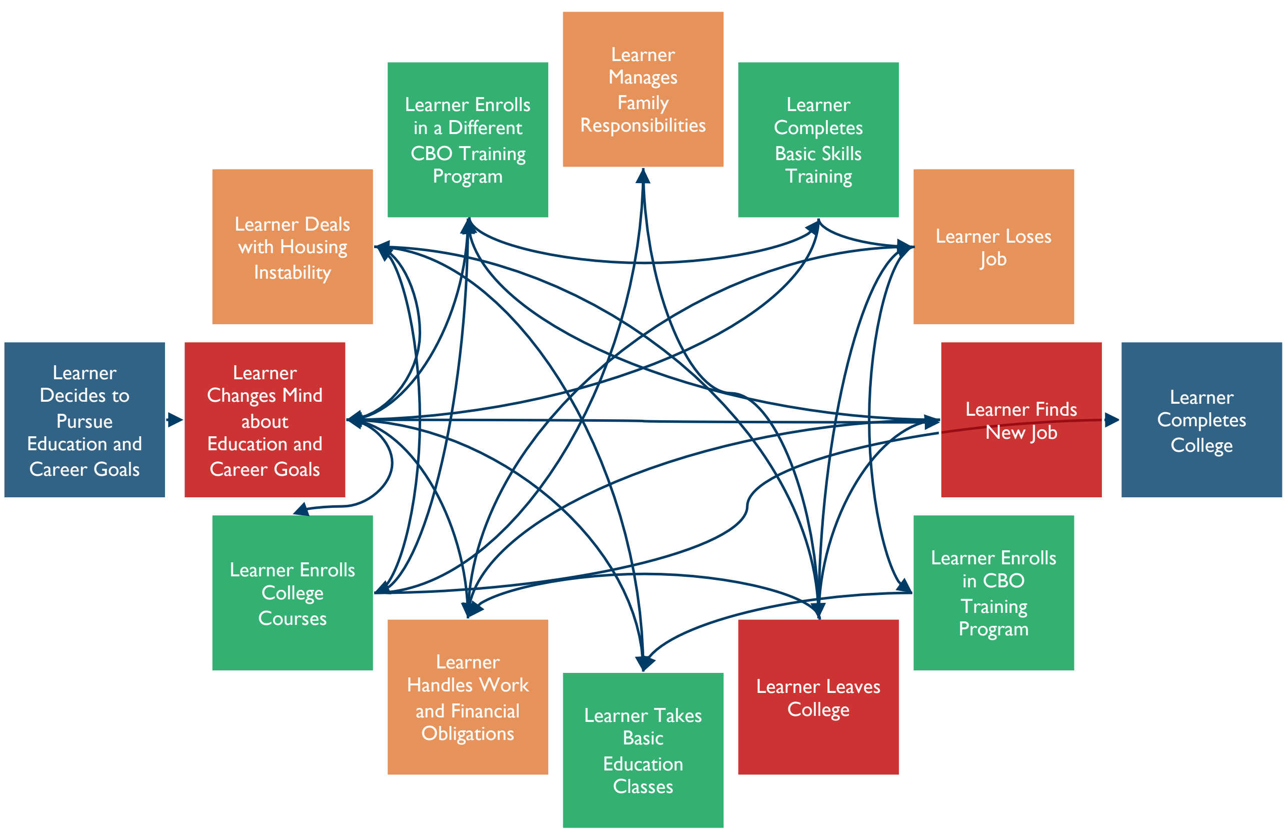
### The Adult Learner Journey: The Idealized Version




An orderly, linear progression, supported along the way from a clear onramp all the way to college completion and on to a successful career. Each step clearly leads to the next, onwards toward a clear goal, and there are few disruptions along the way: the learner enters the pathway and stays on it until completion.

If only life were so simple. In reality, the adult learner journey looks more like this:

### The Adult Learner Journey: The Complex Reality



The path is unclear, and certainly not linear. The educational journey is full of stops and starts, in part due to life challenges and personal obligations, in part due to uncertainty about which steps to take, and in part due to programs that may not be fully equipped to address the learner's needs. The learner often finds themselves stretched between multiple competing demands, and is often unclear about their goals. They may spend time and money (including limited financial aid resources) on education that does not lead to college-level credit toward a specific program of study. There are lots of challenges and distractions along the way. And if and when the learner completes college, it may be unclear whether a satisfying, well-paying career lies on the other side.

In some sense, our job is to find a realistic middle ground between the linear, idealized adult learner pathway shown in the first diagram, and the more typical, messy adult learner journey reflected in the second. We want to simultaneously acknowledge and address the complexity of the adult learner's experience, while engaging in partnerships that align our work to make the journey feel more like the first picture—intentional, ordered, connected, and supported at every step.

## Navigation and Coordination Are Key

To improve the experience and success of adult learners, two imperatives emerge.

- First, adult learners need consistent, intentional support in navigating their journey, developing skills of problem-solving, perseverance, and goal-oriented planning along the way.
- Second, the various partners that make up the "system" must find ways to coordinate their efforts, minimizing the gaps, friction, uncertainties and barriers that adult learners often face to provide a clear and coherent "pathway" that maximizes adult learner success.

This chapter deals with navigation and better serving adult learners, while the remaining chapters deal more with how partners can coordinate their work.

# 10 Things that Can Derail an Adult Learner

In no particular order.

1. **A lack of navigation and intentional hand-offs.** Most adult learners are not aware of the resources and opportunities available to them. They may lack direction, confidence, and perseverance. Getting the “runaround” is a surefire way to take the wind out of one’s sails. (See page 12)

2. **A lack of flexibility in processes and academic offerings.** Overly rigid processes can be barrier to progress, as can traditional academic calendars and highly-prescriptive policies. Lack of acceptance for previously earned credits and lack of access to credit-for-prior-learning. (See page 62)

3. **Unexpected Fees and Costs.** These can include application, assessment, and CPL fees; financial holds due to outstanding balances on student accounts; costs associated with graduation; the cost of books and supplies; and fees to transmit transcripts and degrees (especially with regard to international students). (See page 64)

4. **Misunderstanding the Commitment.** A transparent process and clearly-defined requirements can help adult learners understand the path in front of them and anticipate the challenges along the way. (See page 49)

5. **Life Challenges.** Family obligations, unexpected financial burdens, and other challenging circumstances can derail an adult learner, especially when they lack support and fallback plans.

6. **Placement Tests.** A low score on a single placement test can deflate an adult learner’s confidence and seem like an insurmountable obstacle, especially if the test does a poor job of assessing the learner’s full knowledge and potential. (See page 91)

7. **Job and Financial Obligations.** Educational progress is often in competition with an adult learner’s need to make ends meet. Learners lack access to career advising, including how to balance work and further education.

8. **Misunderstanding Academic Requirements.** For instance, two common misconceptions are (1) that college admissions criteria and academic program admissions criteria are the same (the latter is often more stringent), and (2) that all college credit is “college-level” i.e., contributes towards the completion of an academic program.

9. **The FAFSA.** Applying for federal financial aid can be daunting, and it is often left until the last minute, where it becomes an even larger barrier due to the time crunch many adult learners experience. (See page 64)

10. **Outdated Websites.** The web is often the first place adult learners go for information about educational opportunities. If they can’t find the information they’re looking for, or misinterpret program guidelines or admissions criteria, they may give up on their goals before ever inquiring about other options available to them. (See page 62)

# Navigation Considerations and Challenges

Organizations that serve adult learners—from ABE to CBOs to colleges—are increasingly recognizing the centrality of holistic navigation services that address all facets of an adult learner's individualized needs, including:[20]

- Career exploration and interest assessment
- Academic and career counseling, planning, and navigation
- Academic support, including tutoring
- Wrap-around services, such as childcare, mental health services, chemical dependency counseling, and transportation assistance, including referrals to resources and services
- Transition planning to employment or postsecondary education
- Intentional hand-offs and referrals to other programs to ensure continuity of service and support
- Financial aid education and guidance
- Cultivation of self-advocacy and problem-solving skills
- Development of organizational and planning skills
- Social-emotional support: a trusted advocate who always has an ear to listen, words of encouragement, straight talk when it's needed, and perhaps even a shoulder to cry on.

## "Holistic Navigation" and "Intrusive Advising"

Terms vary, but there is an important distinction between (1) navigation embedded at a college (sometimes termed "intrusive advising" and (2) navigation that takes place outside the college, which assists with a wider array of things, including how to prepare for and select a college.

- **Intrusive advising** on a college campus widens the scope of a typical academic advisor and has the benefit of being present on campus. Intrusive advisors understand the inner workings of the college and are well-situated to help the student navigate the many offices, processes, and resources available on a campus. The downside, however, is that their scope is limited, and their work only begins once the student is on campus.

- **Holistic navigation** is broader in scope, starts earlier in the learner's journey, and is usually provided off-campus by a navigator outside the college system. This allows the navigator to build more trust, with less bias toward any particular postsecondary institution. They are able to help the student navigate the wider ecosystem of resources and supports, of which college is just one part. The challenge, at least with regard to college, is that external navigators may not be fully aware of the resources available at each college, or how to most effectively navigate processes on each campus.

- **The ideal solution** is to have both a holistic navigator and an intrusive advisor who work hand-in-hand to support the learner. In this scenario, the two benefit from a high level of coordination, allowing them to play complementary roles that minimize overlap.

**Navigation Caseloads**

The size of a manageable caseload depends on the goals of the navigation work, its scope, the needs of students, and to a lesser extent, where the navigation is situated (whether it's campus-based or provided by a community-based organization).

- For high-intensity navigation work, which includes academic and college-readiness supports in addition to more holistic, wrap-around supports, a manageable caseload is **15-20 students.**

[20] See the Navigation Checklist on page 50 for a deeper dive into navigation activities.

- For college-based navigation (sometimes termed "intrusive advising"), which is often focused more squarely on supporting students' academic and success on campus, a manageable caseload might be as large as **125 students.**

- **In addition, a navigator's workload often varies over time.** Experience from the field seems to suggest that pre-college navigation hours increase over time as the student approaches college enrollment. Demand for one-to-one navigation support seems to plateau during the first semester after enrollment, leveling off in subsequent semesters.[21]

- There is no clear endpoint for navigation services; it depends on each student's unique journey.

## Navigation Challenges

Conversations with practitioners reveal a common set of challenges around providing high-quality navigation services.

**Funding Navigation Sustainably**
Despite the centrality of navigation to adult learner success, it is often seen as hard-to-define or disconnected from program outcomes. As such, it is often not directly supported by common funding streams in higher education and workforce development. For instance, ABE often struggles to provide navigation services because its funding is primarily tied to instruction delivered by credit-hour. Instead, funding for navigation is often cobbled together, tied to specific grants and projects that are time-limited. This can be a challenge because grants often end before navigation work should. A new grant may come along, but its focus might be different. Funding requirements can shift the work of navigators substantially toward what is fundable by the new grant. This can make continuity of service difficult, and can limit an organization's ability to demonstrate the impact of consistent navigation.

**Other Challenges**

- **Building rapport with students,** especially when opportunities to meet face-to-face are limited.
- **Surfacing issues early on** is difficult, because it takes time to build trust.
- **Staff turnover and programmatic handoffs** can be disruptive as so much of the navigator role has to do with relationship-building. Ideally the student has a single core individual they work without throughout their journey.
- **Sharing student information** is critical to coordination both across organizations and within a college (between its various offices, from financial aid to student account services to academic advising). It's important to have a release of information on file early on to facilitate data sharing. See page 35.
- **Connecting with employers** is important because employment is often the ultimate goal, but employers are often outside the typical "system" navigators operate within.
- **Teaching students to self-advocate** is crucial to their long-term perseverance and success, but when time is limited, it is often easier to simply do things for students directly.
- **Re-engaging completers** can be a challenge for a number of reasons (more urgent demands, students think they're "done", funding might not support long-term follow-up) but it can be essential to keeping learners on their path and helping them access further opportunities, such as help with further employer-based tuition reimbursement.
- **Overlapping/unclear roles** are often common in partnerships, where, for instance, a CBO navigator's role might be seen as duplicative of work happening on the college campus.
- **Reaching students.** Some students are impossible to reach by phone, but quick to respond by text. Make sure to ask each student what form of communication they prefer.

[21] *College Readiness Academy (CRA): Program Evaluation Findings and Considerations.* The Improve Group. (August 2016). St. Paul, MN

- Sometimes, credits are earned by students, only to realize that those credits do not “stack” or contribute to an academic program (it is college credit, but not “college-level” credit). Students are not aware of this in advance.
- Learners are not always aware of course/program requirements, or decide to put off the hardest requirements until the end. Or, they may need help planning their course load to avoid taking multiple difficult courses simultaneously.
- Students do not know of the academic resources on campus, such as tutoring, writing centers, language centers, libraries and library resources such as textbooks on reserve.

# Navigation Tips and Tools from The Field

Successful navigation does not require always knowing the answer to every question, nor the fastest route from point A to point B. Instead, successful navigators exhibit tenacity and resourcefulness, problem-solving and organizational skills, and an ability to seek help and ask questions in a goal-oriented way. And importantly, *effective navigators model these behaviors for their students.*

Here are some hallmarks of effective navigation:

## Build Trust

Successful navigators build trust with their students and colleagues. Building trust:

- Ensures that the student is opens and honest, and willing to share with you the challenges in their life that might carry stigma or shame
- Helps the student see you as someone they can turn to, ensuring that the student will come to you if a need arises.
- Helps you earn legitimacy in the student's eyes and gets you on the same team.

Some tips:

- **Meet the Student Where They're At**, literally and figuratively. Meet with them at a time and place that is accessible to them. Listen with an open mind and an open heart. Don't make judgments about the student's choices or circumstances. Let them know they are heard. Meet them in the community they live and work. Consider office hours at local coffee shop, community restaurant, or local library.
- **Don't Over-Promise**. Be realistic about what you can help the student accomplish, be clear about what services you can provide, and set clear boundaries and expectations. Don't commit to things you cannot deliver. This can be a risk especially for new navigators for whom passion might outweigh experience. Focus on guiding the learner and creating a clear pathway for them.
- **Tell Your Story.** Building trust is a two-way street. If you're comfortable with it, it can be helpful at opportune moments to share your motivations, values, and past experiences with the student, especially if your experiences might resonate with or be instructive to the student. Of course, it's critical to stay within the bounds of a professional relationship—your goal is not to be friends—but often navigators become navigators because they've "been there before" and it can be helpful to share those experiences. Even reflecting internally on your own experiences and motivations can be a good way to tap into the reasons why you do the work, which can be helpful when you're feeling tired or cynical.

## Cultivate Relationships

Successful navigators build relationships with individuals who can help students succeed, and they help facilitate relationships between the student and these individuals as well. This could include:

- Point-people on a college campus (admissions officers, financial aid staff, student services staff, academic advisors, and faculty)
- Staff at local CBOs who can provide supports and other complementary services
- Local ABE providers and others who provide training
- Employers who exhibit a willingness to support and train new hires.

Some tips:

- **Assess Goals and Needs.** Once you've helped a student assess their goals and needs, ask them to think about where they might go for additional support. Help guide them as you identify organizations and individuals to reach out to.

- **Facilitate Introductions and Hand-offs.** Meeting someone for the first time can be scary, especially if you're asking for help. If you're introducing to handing-off your student to someone new, three-way meetings (whether in-person, over the phone, or virtually) are a great way to assuage a student's fear, let them know you've got their back, and reassure them that the new contact is friendly and there to help. It also assures that the connection gets made, and that any needs or questions are properly address. It can also help you build relationships with your counterpart.

## Get Organized

There is a lot to keep track of:

- On the program side: organizations, programs, resources, contacts, eligibility info, et cetera.
- For each student: deadlines, contact info, needs and interests, questions and follow-ups to address, and so on.
- Early on, it is important to adopt or establish a client management system to keep track of student information, progress, and outcomes.
- It is also essential to have a calendar management system, such as an app that helps schedule and manage appointments.
- You'll need a system and processes for basic nuts-and-bolts "project management", i.e., logging, assigning, and addressing internal issues and to-dos as they arise. This can include everything from major partnership milestones to mundane processes like procuring additional supplies.

We won't claim to have be-all end-all approach to staying organized. Instead, we urge you to set up a system that works for you. Speak with your colleagues about what works for them:

- A whopping white board?
- A slew of spreadsheets?
- A particular productivity app?
- A system or app for scheduling appointments?
- Or perhaps a good old-fashioned notebook or two?

Staying organized will help you navigate students more smoothly to specific resources and opportunities that meet their needs. And it will help you better hold your students accountable to the tasks they've agreed to do. If they know you're paying attention, they are more likely to stay on task (and on track).

## Set Goals, Make Plans, and Break Down the Steps

It's a cliché because it's true: a mountain seems impossible to climb when it's standing in front of you. But taking a few steps is doable. And if you stick to it, eventually you'll look back and be amazed by how far you've come. The best navigators know how to make (and stick to) a plan, and perhaps more importantly, they know how to teach those skills to their students.

Some tips:

- **Baby Steps.** The adult learner journey can be a long and winding road. Model the practice of breaking down big goals into phases, and then break down each phase into baby steps. Work with your student to create an orderly sequence of tasks from the sometimes-disorderly feeling of day-to-day life. What can we get done today? Tomorrow? This week? This month?
- **Make Checklists.** People have written whole books about the importance of checklists in fields from medicine to the military.[22] If you've ever asked yourself, "am I forgetting something?" you probably need a checklist. In addition to helping you make sure you're on-track and not missing

[22] See *The Checklist Manifesto: How to Get Things Right* by Atul Gawande

anything, checklists can be a great way to help students and others visualize the road ahead, and they can also help you track your progress and celebrate all you've accomplished.[23]

- **Support Student Progress.** Even baby steps can be daunting; don't assume that a well-laid plan is easy to execute. Make sure to check-in often with students on their progress. For each upcoming task, ask the student how comfortable they feel about it, if they've got concerns or questions, and whether they need additional support.
- **Be Flexible about the Plan.** Plans can and should change over time. Life happens. If a student gets behind schedule, an overly rigid plan can make them feel forever behind, which can be demotivating. In these instances, it's okay to update a plan, since ultimately it's a tool to help one achieve their goals. But it's a balance: too much flexibility can undermine accountability and progress toward the goal. There's no rule-of-thumb here, but revisiting the plan is always a good opportunity for navigators to dialogue with the student, and to model problem-solving and time-management skills.
- **Acknowledge Progress and Celebrate Successes.** It's important to take a moment to celebrate successes large and small, both with colleagues and with students. Success can mean getting high marks or receiving a credential, but sometimes success starts with a setback, like failing a class, which prompts a deeper discussion and a change in goals or outlook. Success can be the reaching of a milestone or the broader cultivation of new life skills.
- **Celebrations for learners are not only a means of recognizing accomplishments—they are one of the ways adult learners begin to identify as college students.** Recognition that their learning is college preparation or college-level is a positive message that should be reinforced. Often adult learners bring spouses and children to celebratory events, reinforcing the positive learning message for the whole family.

## Tap into Peer Groups

If you're part of a team of navigators, work together to strengthen your practice and share information.

- **Among Navigators.** You can develop individual areas of expertise, then tap into each other's knowledge as needed. Or develop mentor/mentee relationships around specific areas of practice. The role of sharing information and acting as mentors can extend outside the navigator circle as well: consider ways navigators can inform and support the work of other staff as well.
- **Among Students.** In a similar vein, students often benefit from peer groups as well. Effective navigators find ways to cultivate collective efficacy among the cohorts of students they serve. Students can mentor one another, share wisdom, and build supportive relationships with one another while in-program and via alumni groups. If providing classroom navigation curriculum, consider ways to make topics more interactive and discussion-based.

## Advocate and Self-Advocate

Navigators are often the primary advocates for their students, but they must also teach students to self-advocate as well. Look for opportunities to help your students:

- Clearly express their needs and proactively ask for help
- Prepare to persevere if they hear "No" or run into unforeseen obstacles
- Learn from failure and be gentle with themselves
- See their strengths and take pride in their progress

[23] The Navigation Checklist on page 47 is a good starting point.

## Navigation Checklist

This checklist is adapted from the "Postsecondary Supports Checklist" created by navigators at Goodwill/Easter Seals of Minnesota. It is by no means an exhaustive list (feel free to make it your own) but it can serve a number of purposes:

- As a fairly comprehensive to-do list for navigators and students alike
- As a way to help adult learners see the path ahead and acknowledge the progress they've made
- As an outreach tool, to help colleagues make referrals and understand what navigation involves.

### Addressing Needs

- ☐ **Identify goals and strengths.** What does the student hope to achieve and what strengths can they build on?
- ☐ **Identify and address student needs and questions.** What are they worried or nervous about? What are they unsure about?
- ☐ **Map out the student's existing support network.** Friends, family, mentors, other community organizations they're involved in: who can the student draw support and encouragement from?
- ☐ **Set up an organizational system with the student.** How do you plan to work together to keep information, dates, deadlines, etc. organized?
- ☐ **Create a plan of action for the student** that clearly lays out the road ahead over time; help them be realistic about the work involved, but also confident that they can achieve it one step at a time.

### Exploration

- ☐ **Career Exploration:** Assess student interests (complete interest surveys/assessments, identify transferable skills).
- ☐ **Program/College Exploration:** Identify specific programs and/or schools for pathways; identify application processes for schools and/or programs.
- ☐ **Explore Education/Certification Requirements** for their career goal & pathway.
- ☐ **Discuss Differences between High School and College:** including topics such as self-advocacy, supports, and accommodations.
- ☐ **Discuss College Culture:** Including topics like the college credit system, homework/class expectations, and types of degrees.
- ☐ **Discuss College Success Strategies:** For instance, taking fewer credits first semester, using office hours, and weekly tutoring.
- ☐ **School/Program Exploration**: Identifying program(s) of interest, matching skills and possible career outcomes.

### Applications

- ☐ **Complete FAFSA and the verification process:** Walk through the process with the student to help them understand the application and the information and supporting documents they will need.
- ☐ **Check for State Financial Aid Opportunities.** Some students may not be eligible for Federal Student Aid (using the FAFSA) but are eligible for state aid. Specific information on state aid is available on the Office of Higher Education website (https://www.ohe.state.mn.us).
- ☐ **Complete College Application(s):** Includes registering for Star ID.
- ☐ **Scholarship application:** Including searching for and applying for school specific and/or private or industry specific scholarships.

- ☐ **Send High School Transcript to College**
- ☐ **Send IEP/Formal Documentation for Accommodations and Support to Accessibility Office**
- ☐ **Keep Track of Passwords** and other important information (UserIds, account numbers, etc.).

## Making Connections and Following Up

- ☐ **Meet with Accessibility Office Staff Member:** Assist with initial connection, assist student in preparing for self-advocacy and subsequent communications.
- ☐ **Meet with a TRIO Staff Member/Advisor:** Assist with initial connection and application to get into program, assist student in preparing for self-advocacy, and subsequent communications.
- ☐ **Learn How to Log In/Use E-Services Portal:** Review class registration, Financial Aid needs/awards, look for balances, and grades.
- ☐ **Check to See if FAFSA Received:** Complete & upload any verification paperwork required for FAFSA processing.
- ☐ **Meet with Financial Aid Office as Needed:** Assist with initial connection, assist student in preparing for self-advocacy and subsequent communications.
- ☐ **Check Financial Aid Letters, Accept Grants using E-Services Portal**
- ☐ **Check and Resolve any Account Holds in E-Services**

## Getting Ready for Class

- ☐ **Learn about the Differences between Synchronous and Asynchronous Online Classes**
- ☐ **Check on Class Schedules, Courses Available**
- ☐ **Learn How to Look up Degree Requirements, Pre-Requisites:** Understand who to contact if needed to ask questions or have holds lifted if needed.
- ☐ **Sign up for study skills or college success seminar**
- ☐ **Complete Online Orientation Prior to Class Registration**
- ☐ **Register for Classes**
- ☐ **Look Up and Purchase/Rent Textbooks**
- ☐ **Help Student Identify Success Strategies in Identified Areas:** Time management, communication, meeting basic needs, etc.
- ☐ **Send Audio Textbook Request Form to Accessibility Office**
- ☐ **Develop Homework Plan for Semester using Scheduling Template**
- ☐ **Send Accommodations Letters to Instructors**
- ☐ **Communication with Instructors:** Assist with initial connections, assist student in preparing for self-advocacy and subsequent communications.
- ☐ **Learn How to Schedule Extended/Quiet Testing Accommodations, Test Reader**
- ☐ **Read Syllabus/Assignment List:** Including due date policy & office hours/tutoring schedule.
- ☐ **Learn How to Use the Necessary Online Course Management System(s)** such as D2L, Google Classroom, Canvas, Blackboard, or Moodle.

## Other Items as Needed

- ☐ **Check in about Drop/Add and Withdraw Deadlines for the Semester**
- ☐ **Assist Student in Appeal Process:** If previous semester resulted in hold, or suspension, both with the academic office as well as financial aid.

- ☐ **Assist Student with Transfer to New School:** Assisting in connecting students to tours, assisting with the application process, transferring credits, initial meetings, adjusting financial aid, Registering for classes.
- ☐ **Applying for Emergency Financial Assistance** if needed, including from federal, state, school and CBO sources, including in-kind resources from food to used PCs.

## Navigator Position Description: Example #1 (CBO)

*These position descriptions provide insight into the roles and requirements of various navigator positions across Minnesota, including those based at ABE Sites, Community-Based Organizations, and Colleges. They can be used to draft new position descriptions for your organization.*

**Job Title:** College Navigator (1.0 FTE)
**Reports to:** College Readiness Academy Program Manager

**Position Description:** The College Navigator works within the College Readiness Academy (CRA), a partnership that assists Adult Basic Education students in the transition to and through college through intensive college orientation, case management, and wrap-around support services. The Navigator assists students with college applications, financial aid and scholarship paperwork, selection of classes/programs, balancing study-work-family, and self-advocacy. S/he works with students in a classroom setting as workshop facilitator and one-on-one to address personal and academic challenges and to aid in successful entry into college and in completion of their first semesters. The Navigator shares the responsibility of recruiting students for CRA with the second Navigator and with the Program Manager. College Navigators are also responsible for detailed data collection and analysis in multiple databases, including a cloud-based customer relationship management system.

**Background:** College Readiness Academy instruction focuses on college-level reading, writing, vocabulary-building, computer, and study skills in order to support traditionally under-served students with academic and/or personal barriers to college. To supplement this academic preparation, two full-time navigators are on staff to prepare students for the transition into college and support them once they are enrolled.

**Job Qualifications:**

- Bachelor's Degree
- Experience working with New Americans and non-native speakers of English
- Familiarity with systems of higher education
- Proficiency in analyzing numerical data and communicating complex data in an accessible way
- Preferred experience in advising, admissions, and/or teaching within the college system
- Preferred experience in education-related marketing and outreach
- Preferred experience with CRM systems, such as Microsoft Dynamics or Salesforce
- Excellent organizational skills with the ability to handle multiple projects simultaneously
- Excellent written and verbal interpersonal/communication skills
- Skilled in problem-solving and able to take initiative
- Knowledge of local community resources
- Driver's license, insurance, and reliable transportation

**Duties:**

- Assist students one-to-one in developing individual education plans, registering for classes, and applying for financial aid and scholarships
- Support students through the trajectory of their degree program, including but not limited to academic planning and support in overcoming personal obstacles
- Collaborate with instructors to integrate navigation into their classrooms and discuss student progress
- Present weekly lessons on topics such as goal-setting, choosing colleges & careers, understanding a syllabus, interpreting program guides, understanding financial aid, and time management
- Assist students in preparing for employment through resume and cover letter development, mock interviews and job search support, as needed
- Work closely with CRA staff to share resources, organize protocols, allocate tasks, and address gaps in services
- Maintain detailed and accurate participant records and program outcomes in databases
- Prepare regular program reports for leadership and program partners
- Collaborate with the other college navigator to lead new student recruitment and registration
- Present at regional and state conferences on behalf of College Readiness Academy

## Navigator Position Description: Example #2 (College)

*These position descriptions provide insight into the roles and requirements of various navigator positions across Minnesota, including those based at ABE Sites, Community-Based Organizations, and Colleges. They can be used to draft new position descriptions for your organization.*

**Classification Title:** MnSCU Academic Professional 2
**Working Title:** Social and Community Resource Navigator

**POSITION PURPOSE:**
To ensure the College provides equitable and inclusive services to students through administration, oversight, and leadership to the Office of Equity and Social Navigation. To provide a range of professional social and community resource navigation services to College students. The goal of this position is to assist students in overcoming specific barriers through equitable and inclusive programmatic efforts, success strategies, financial aid advice, and referral to supportive services within the college community and the larger community in which the campus/student resides.

**Reports to:** Vice President of Student Affairs
**Supervises:** N/A
**Clientele:** Students, Student Affairs personnel, Local community service agencies serving college students, Faculty and administration

**PRINCIPLE RESPONSIBILITIES, TASKS, AND PERFORMANCE INDICATORS**
**1. Serve as the social navigator for students in need and at risk.**
Priority: A Discretion: A Percent of Time: 30%

Tasks:
1. Interview/meet with students in need to gather and analyze social history information related to the student's difficulties in the successful continuation of higher education.
2. Maintain interview/meeting records and notes in the Customer Relations Management (CRM) system.
3. Triage internal student referrals. Meet with faculty and staff to discuss student situation and provide information for coordinated care and success planning.
4. Interpret and communicate College policies, and state and federal laws to students, faculty, staff, parents, and family members.
5. Correspond with campus administration, college support providers, and others concerning their interest and previous contacts with the student.

Indicators:
1. Student records in the CRM will display contact date, student issue, recommendations, internal and external agencies/resources referrals and outcomes.
2. Student plans for assistance/service and success will be in the CRM for others to reference.
3. Annual report to the college community will present outcomes focused on data, noting number of student issues by category, number and type of internal and external referrals, and student persistence outcomes.

**2. Lead and manage the Early Alert process; College Assessment, Referral, and Education (CARE) Team; and other persistence and completion initiatives.**
Priority: A Discretion: A Percent of Time: 25%

Tasks:
1. Administer the Early Alert system for retention support using an electronic customer relations management (CRM) tool.
2. Manage the Early Alert process in collaboration with academic leadership.
3. Coordinate the Early Alert process through management of reach out to students on Early Alert. Collaborate with the Enrollment Advisors and Financial Aid Specialists, Student Support Services advisors, the Accessibility Services Coordinator, and other relevant team members to contact students on alert.
4. Lead the CARE Team and manage the student referral process while maintaining professionalism and confidentiality.
5. Champion other success initiatives.
6. Collaborate with the Office of Institutional Research to complete statistical analysis of the Early Alert process, CARE Team initiatives, and other success initiatives.

Indicators:
1. Maintains a keen understanding of the CRM to keep accurate records and provide professional development on the system to faculty and other college professionals.

2. Current and relevant information is provided to academic leadership to maintain and grow support of the Early Alert process.
3. The Early Alert call process is organized and delegated to appropriate Enrollment Advisors and Financial Aid Specialists, Student Support Services advisors, the Accessibility Services Coordinator, and other relevant team members.
4. Ensures calls/emails are documented in the CRM system in a timely and concise manner.
5. Analyzes Early Alert data and prepares reports in collaboration with the Office of Institutional Research.
6. Trains faculty, Enrollment Advisors and Financial Aid Specialists, Student Support Services advisors, the Accessibility Services Coordinator, and other college personnel on the Early Alert CRM, CARE Team submittal process, and other relevant procedures.
7. Students referred through the CARE Team and those who are generally of concern have their risks diminished through timely and proper intervention and referral.
8. Maintains knowledge and understanding of workflow processes, such as JIRA, for CARE Team administration and oversight.
9. Develops progression and success reports and communicates them to faculty and other college personnel in a professional, concise, and accurate manner.

**3. Promotes the Office of Equity and Social Inclusion and student social well-being and support through consultation with and education and resources to college personnel, students, families, and community agencies.**

Priority: A Discretion: A Percent of Time: 20%

Tasks:

1. Serve as college partner in educating faculty and staff on the needs of specific populations (i.e., poverty level, homeless, New Americans, single parents, under-represented students, abuse survivors).
2. Prepare and distribute to college personnel and students, hard-copy resources on shelter, food, clothing, fiscal management, social programs, transportation, and cultural centers.
3. Maintain a web presence, in collaboration with the Marketing and Communications team, on the College website to communicate the mission of the Office of Equity and Social Inclusion, social navigation, initiatives, and college and community resources.
4. Offer workshops to inform college personnel and students of resources available such as housing, food, clothing, financial assistance, personal counseling, and other support services.
5. Participate in various resource fairs on and off campus.
6. Coordinate Mobile Food Pantry and on-campus food shelf in collaboration with Student Life professionals.
7. Work with a multi-disciplinary team to develop, plan, and deliver programming.

Indicators:

1. Provides a minimum of one workshop opportunity per semester for college personnel and students.
2. Current and relevant information promoting supportive community resources will be available and maintained in the Enrollment Services and Student Life areas.
3. The web presence will be reviewed and updated annually, in collaboration with the Marketing and Communications team, or more frequently to reflect changes in internal and external resources.
4. Participates in a minimum of one resource fair per semester.
5. College's food shelf will be maintained and available to students.
6. Facilitates multi-disciplinary team meetings and acts with integrity and professionalism while maintaining confidentiality.

**4. Provide financial aid and financial literacy advising and workshops by accurately informing students of campus-based grant, loan, scholarship, and work-study funds including the ramifications of student debt.**

Priority: A Discretion: A Percent of Time: 20%

Tasks:

1. Assist students with financial aid applications and processes such as Federal Student Aid (FSA) ID, Free Application for Federal Student Aid (FAFSA), Stafford Loan, SEOG, post-secondary childcare grants, entrance/exit counseling, grants/scholarships/work study, dependent/independent verification, and consortium agreements.
2. Answer financial aid questions on status, award letters, aid disbursement, loan repayment and transferring to/from College.
3. Verify a variety of documents to determine financial aid eligibility.
4. Ensure correct application of campus-based grant, scholarship, and work-study proceeds to student accounts using proper procedures.
5. Provide financial literacy workshops on and off campus.
6. Participate in required and available professional training provided by government agencies and professional associations.
7. Research and respond to issues identified by Financial Aid professionals, college administration, and other stakeholders regarding the grant, scholarship, loan, and work-study programs.
8. Consider and refer student requests for emergency scholarships and other funding sources.
9. Guide students through the Student Academic Progress (SAP) requirements and appeal process. Meet with students to develop a College Success Plan following academic or financial aid probation or suspension.

Indicators:

1. Federal and state grants, scholarships, loans, and work-study program data and funds are accurately and efficiently communicated to students.
2. Student accounts are updated in an accurate and timely manner.
3. Federal and state grants, scholarships, loans, and work-study program funds returned in an accurate and timely manner.
4. Federal and state grants, scholarships, loans, and work-study program fund records are complete and accurate.
5. Provides a series of financial literacy workshops at least once per year on and off campus.
6. Maintains current and up-to-date level of knowledge regarding financial aid laws, regulations, rules, and issues through accessing resources and participation in affiliated training/workshops.
7. Responds professionally, promptly, and concisely to information requests.
8. Maintains current level of knowledge regarding software for campus-based grants, scholarships, and work-study program funds.
9. Students have clear understanding of SAP and the ramifications of such. They have a documented and thorough College Success Plan.

**5. Perform related tasks of benefit to students at the college, in support of the relationship management process.**
Priority: B Discretion: B Percent of Time: 5%

Tasks:

1. Participate in college events that promote enrollment goals: Open Houses, Student Orientation and Registration, community events, graduation, and other activities in support of college personnel and students.
2. Participate in continuous quality improvement within Student Affairs and the college community and communicate necessary changes.
3. Facilitate career planning based on student needs, goals, values, and resources.
4. Represent self and college within the community in a professional manner.
5. Update professional skills through membership in professional organizations and participation in professional conferences/meetings.
6. Other duties as assigned.

Indicators:

1. Participates positively and actively in special events such as Open Houses, High School Teacher and Counselor Breakfasts, and Student Orientation and Registration.
2. Provides a clear career plan for students.
3. Demonstrates flexibility and willingness to help when necessary.
4. Actively participates in, or seeks out, professional development opportunities.
5. Understands and complies with the college rules, regulations, and policies.
6. Completes other duties as assigned.

**NATURE AND SCOPE**

**Relationships:**

This employee will work cooperatively with admissions staff, enrollment advisors and financial aid specialists, financial aid professionals, accessibility services personnel, TRIO/Student Support Services professionals, student life personnel, administration, and faculty to provide support and advisement for students in need of social, success, and financial aid service. In addition, he/she will establish and maintain effective relationships with support agencies, educational facilities, and individuals in the community on behalf of the students and college.

**Knowledges, Skills, and Abilities:**

Minimum Qualifications:

- Bachelor's degree in social science, human services, or related field.
- Minimum of two years of experience working in social science, human services, community support services, student support services, or related field.
- Knowledge of current principles, practices, and techniques of the social and human service field.
- Knowledge of intervention techniques sufficient to meet the needs of the student population.
- Knowledge of community social and support resources.
- Knowledge of diverse, equity, and inclusion issues and ability to facilitate and manage students with such issues.
- Ability to manage crisis situations.
- Knowledge of local, state, and federal laws and regulations affecting social and accessibility services.
- Demonstrated ability in resolving complex and challenging situations.

Preferred Qualifications:

- Master's Degree in social science, human services, or related field.
- Experience working in a higher education setting.
- Experience working with various community social organizations.

- Knowledge of higher education policies and procedures including federal law and regulations relative to financial aid and accessibility services.
- Experience with financial aid and literacy programming and processes.

This position demonstrates a commitment to meeting the needs of students and college personnel and meeting their expectations by the ability to develop sound and professional working relationships on and off campus. Delivers welcoming messages, communicates clearly and effectively, uses active listening skills, and appropriately refers students to resources. Exhibits responsiveness, respect, empathy, and professionalism. Demonstrates a commitment to continuous improvement and teamwork in the area of student and college personnel service.

The ability to communicate orally with faculty, staff, students, and external stakeholders and resource professionals is essential for face-to-face, online, and telephone interactions and presentations. The employee must also be able to work with little supervision, understand the cyclical nature of higher education and effect on student interactions, and have good organizational skills.

**Problem Solving:**
A working knowledge of college, Minnesota State, local, state, and federal policies and procedures is important in problem solving and serving college personnel and students. The employee in this position must be able to apply policies consistently and fairly in each situation. Decisions are continually being made on how to meet the career, personal, and educational needs of students. Requires the ability to set job priorities, use analytical reasoning, and determine alternatives to a myriad of problems facing college students. The employee in this position must plan and organize multiple activities and meet deadlines while maintaining flexibility and prioritizing workload.

**Freedom to Act:**
The employee is free to act within federal and state guidelines, Minnesota State and College policies, and at the discretion of the Associate Vice President of Student Affairs, Vice President of Academic and Student Affairs, and the College President. The employee must be able to follow through on the assignments outlined in the position description and college planning documents. Must make recommendations to the Associate Vice President of Student Affairs as to the needs of program initiatives. Coordination and effective communication with Student Affairs personnel and faculty is essential.

*This description is intended to indicate the kinds of tasks and level of work difficulty required of the position. It is not intended to limit or modify the right of any supervisor to assign, direct and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar level of difficulty.*

*Minnesota State Colleges and Universities is an Equal Opportunity employer/educator committed to the principles of diversity.*

## Navigator Position Description: Example #3 (College)

*These position descriptions provide insight into the roles and requirements of various navigator positions across Minnesota, including those based at ABE Sites, Community-Based Organizations, and Colleges. They can be used to draft new position descriptions for your organization.*

**Department/Division:** Student Affairs
**Classification Title:** MnSCU Academic Professional 2
**Working Title:** Adult Learner Advisor

**POSITION PURPOSE** (why position exists; how it helps accomplish mission of the department/division)
This position delivers high quality, student centered, and culturally responsive support to returning adult students. This position directly supports adult learners' efforts to successfully transition to the college and reach their academic goals, providing advising to applicants and students who need additional support to navigate complex financial aid situations, admission, assessment or registration issues.

The Academic Advisor/Navigator will provide academic, admissions, career program, financial aid, registration and transfer-in advising services to adult learners. This position will provide strategic advising including tracking academic progress of grant participants, provide retention strategies, organize cultural and academic activities and workshops, provide referrals, and network with community agencies. In addition, they will assist Student Affairs with customer service and coverage.

**PRINCIPLE RESPONSIBILITIES AND RESULTS**
**1. Advise applicants and students with necessary information regarding academic programs, financial aid, and transfer advising to adult learners to maximize the student-advisor relationship.**
Provide engaged pro-active and strategic advising services aimed toward developing and maintaining working relationships with advisees to maximize student achievement, retention, persistence, and educational goal attainment. Provide advising to adult learners by utilizing knowledge of college curriculum, tutorial services and social activities to assist students in selecting appropriate developmental or academic courses, in obtaining tutoring assistance and in participating in campus activities to help them make a successful transition to college. Advise adult learners through walk-ins, appointments and workshops to assist students with enrollment processes, to resolve problems related to registration and their South Central College records, and to assist students in making schedule changes (drops/adds/withdrawals). Works directly with adult learners transferring to South Central College by providing advising for all program majors and Minnesota State Transfer Curriculum requirements to provide information to assist student in making appropriate career and program major decisions. Make referrals as needed for academic, career, personal-social counseling, online resources, the MN Career Information System, ISEEK, and other academic/career planning resources/materials.
**Priority: Essential Percent of Time: 35%**

**2. Provide assessment and other resources to guide and assist students for educational path selections.**
Provide assessment preparation resources, understand assessment scores, and interpret the results for course selection and/or Adult Learning (ABE) referral. Assists students with financial aid applications and processes. Strengthen the service relationship with incoming students by participating in new student advising and registration sessions, records preparation, and presentation facilitation. Interpret SCC, Minnesota State, and federal policies and guidelines and translate them into advising procedures, processes, and services. Maintain a thorough understanding of college programs, credit for prior learning, curriculum, policies, procedures, forms and website services to give accurate information to students.
**Priority: Essential Percent of Time: 30%**

**3. Develop and implement supportive activities to ensure retention and completion of grant participants.**
Develop, promote, and implement student support activities and services that promote success of program participants in higher education and to fulfill MN Reconnect program mission and objectives that include but are not limited to cultural enrichment activities, workshops, or individual sessions on interpersonal processes, stress management, time management, decision making, financial literacy, study skills, choosing a major, and any other workshops that would aid in the participants' success. In addition, identify and register qualified staff and students for participation and leadership roles in program events and maintain documentation of participant attendance. Refer students to academic support services, appropriate campus services and community resources as needed.
**Priority: Essential Percent of Time: 15%**

**4. Collaborate with the Director of Admissions & Financial Aid and support department efforts of Advising & Registration Center**
Perform outreach to adult learners who are eligible for the MN Reconnect program. Manage applicant and admitted not enrolled student lists and facilitates mailings, email and telephone campaigns to students. Follows up and reports on non-matriculating students. Assists Admissions with enrollment management events. Assists in providing customer service and advising services to all students in the Student Services area. Communicate with students regarding key registration related

advising services and policies such as: eTranscripts, eServices, Brightspace, registration dates, drop/add period, and the last day to withdraw information. Uses professional judgement when determining registration advanced overrides. Assists with graduate follow-up. Provide customer service and ensure the smooth daily operation of the registration process.
**Priority: Essential** **Percent of Time:** **10%**

**5. Perform related tasks of benefit to all new and current students at the college.**
Participates in college events that promote enrollment goals: job fairs, career fairs, college fairs, county fairs and parades, community events and other activities designed to recruit and retain students. Participates in continuous quality improvement within Student Affairs and the college community and communicates any necessary improvements or corrections. Provide other support such as covering incoming emails, phone calls, and drop-in student traffic. Assist with the development and implementation of college-wide enrollment services policies and department goals. Represents self and college within the community in a professional manner. Updates professional skills through membership in professional organizations and participation in professional conferences/meetings.
**Priority: Secondary** **Percent of Time:** **5%**

**6. Perform other duties as assigned to ensure the smooth functioning of the department and maintain the reputation of the organization as a viable business partner.**
Maintain a thorough understanding of college policy, procedures, programs, curriculum, and services to give accurate information concerning admission, registration, and progress towards graduation and/or transfer. Provides accurate and timely information to students using the appropriate means of contact. Ensure college data integrity, reliability and accuracy of student records. Identify and help resolve student record data integrity issues. Maintains the confidentiality of student information as required by FERPA. Organize and prioritize tasks to meet department deadlines in a high-traffic environment.
**Priority: Secondary** **Percent of Time:** **5%**

***Priority**: Essential=if responsibility is reason job exists, is a highly specialized task or one that requires special education or training licensure, requires a great % of time, has a high level of accountability (consequences are considerable to others or the institution if failure to perform), the responsibility is essential; Secondary=if not essential, then responsibility is secondary; **Discretion (optional)**: A-Employee investigates situations, makes decisions, takes appropriate action reports by exception and through normal review processes; B=…reports to supervisor immediately after action is taken; C=…makes decisions with supervisor….reports to supervisor immediately after action is taken; D=Employee discusses situations with supervisor before investigation, makes decisions with supervisor, takes appropriate action, and reports to supervisor immediately after action is taken.*

**KNOWLEDGES, SKILLS, AND ABILITIES**
**Minimum Qualifications** (expected to have to enter job)

- Bachelor's degree in education, social sciences, psychology, human services, business, organizational management or a related field
- Two or more years of experience working in Higher Education environment.
- Effective communication skills, including the use of social media, presentation skills and the ability to communicate and work effectively with diverse audiences
- Demonstrated solid public speaking skills with comfort in presenting to large groups.
- Proficient in Microsoft Office, word processing, spreadsheets, database management, electronic calendar management, data entry and maintaining accurate records
- Customer service practices and principles sufficient to identify each student's needs, meet quality standards for services, and evaluate student satisfaction.
- Work cooperatively with internal and external clients
- Demonstrated ability to learn new information quickly and to interpret information with attention to detail and accuracy.
- Able to plan, organize and administer multiple activities and meet deadlines.
- Problem solving skills sufficient to set priorities, reason analytically, determine alternative solutions, analyze and interpret information with a high degree of accountability and accuracy.
- Effective organizational and time management skills to manage multiple projects.
- Knowledge of Admissions, Advising, Financial Aid, Records & Registration and Support Services.
- This position requires a high level of knowledge of higher education policy and procedure. Have valid driver's license, good driving record and the ability to travel between campuses, area high schools, other work-related events, and overnight travel.

**Preferred Qualifications** (desired but not expected to have to enter job)

- Masters degree.
- Experience in working with student record systems, project management and specialty software. (Example: DARS, ImageNow, Right Now, SharePoint)
- Admissions or registration experience within a MnSCU agency.
- Multilingual or multicultural background or experience working with underserved populations.

**RELATIONSHIPS**
**This Position Reports to:** MnSCU Academic Supervisor 2 – Director of Advising & Registration
**Supervises**: Work study students

**Internal and External Clientele and Purpose of Contact** (the most significant job related contacts) This position works as a member of a team and must have excellent interpersonal skills. The students are their primary contact; however, they will work with counselors, other faculty, administration and staff and the general public. Must work to establish and implement positive procedures in dealing with unexpected problems and complex work assignments. The employee in this position must be able to apply college policy consistently, working with students in establishing their educational path and working closely with counselors for any issues that go beyond the students educational needs.

**Problem Solving:**
This position requires the ability to independently interpret policies and procedures, identify and solve problems and/or recommend solutions for helping students determine their educational path. Requires the ability to set job priorities, use analytic reasoning, and determine alternatives to problems facing college students while establishing their educational schedules and their educational goals. They must have the ability to differentiate between what is appropriate to take action to resolve within the educational planning sessions and those personal needs which may need to be referred to supervisor for resolution.

**Freedom to Act:**
Free to act and make decisions within areas of principal responsibilities. Operates independently on a day-to-day basis within established policy, procedures, processes and practice, articulation agreements, and higher education institution requirements. The freedom to act is imbedded within the policies and procedures of both the college and the system. Institutional integrity requires adherence to standards. Coordination and communication with Student Services staff is essential. However, the inevitable issues associated with unique student needs requires the position holder to be able to recommend possible exceptions to students, staff, faculty, Registrar, and administration. Externally imposed controls are MnSCU policies, College policies, state and federal law and union contracts.

This description is intended to indicate the kinds of tasks and level of work difficulty required of the position. It is not intended to limit or modify the right of any supervisor to assign, direct and control the work of employees under his/her supervision. The use of a particular expression or illustration describing duties shall not be held to exclude other duties not mentioned that are of similar level of difficulty. Minnesota State Colleges and Universities is an Equal Opportunity employer/educator committed to the principles of diversity.

# How Colleges Can Champion Adult Learners

## Faculty Champions and Professional Development on Campus

- **Cultivate faculty champions (or become one!) for adult learners.**[24] Faculty champions serve as an on-campus source of knowledge on academic options for adult learners, including CPL, assessment, guided self-placement, and articulation agreements. They assist faculty who are new to these things and identify opportunities to expand their use on campus. Any faculty who has some experience with CPL, assessment, etc. is a good candidate to become a faculty champion. These champions should engage faculty union representatives and academic leadership early on in their work to gather input and buy-in. Campuses can support faculty champions by providing them with professional development opportunities and release time.

- **Pursue and/or offer small grants to support faculty work and professional development.** Grants can help afford faculty the time and resources to develop and carry out assessments, build out crosswalks to existing community-based trainings, and support collaborations with internal and external partners. Small grants can also facilitate professional development by paying for trainings and release time for faculty.

## Making Campus More Friendly to Adult Learners

- **Make sure all student-facing staff are aware of resources available to adult learners.** This could include academic opportunities like CPL, but should also focus on other supports. For instance, every campus has a basic needs office and a food pantry. Most campuses have a Parent Center. Some provide resources around transportation and childcare. Most campuses have a Foundation that provides some forms of emergency assistance.

- **Ensure that every adult learner has at least one person on campus they can turn to for guidance.** This could be an academic or career advisor, faculty, or staff from an on-campus support program such as TRIO.

- **Ensure Access to Mental Health Resources** and work to reduce stigma.

- **Offer evening and weekend classes as well as online and accelerated courses and provide childcare and transportation assistance.** Even if a course is online, often a small number of students will come to campus to use the computer labs because they may not have access to the technology for an online course. These students may also need childcare and transportation.

- **Ensure that basic services are available outside of regular work hours.** Including the business office, the registrar, scheduling.

- **Connect adult students to on-campus employment opportunities.** This can help satisfy on-the-job training requirements, also appears to help boost student retention and feelings of connection to the campus.

- **Develop or update procedures (e.g., scheduling, transcripting, paying fees) to be friendly to adult learners.** Improving these processes can benefit all students and generate administrative

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[24] The "faculty champion" concept is covered in depth in *Credit for Prior Learning: A Practical Guide for Community Colleges* by Dr. Marsha Danielson (available at https://southcentral.edu/images/departments/CPL/CPL_Implementation_Guide) in the context of CPL, but has been generalized here to apply to other strategies for supporting adult learners.

savings over time. See page 115 for guidance and an example of how to create a student-centered "process maps".

- **Hire new staff and faculty who are empathetic to adult learners**, understand their needs, and are supportive of efforts to better support adult learners.

- **Make criteria for transfer, articulation, and entrance clearer.** This may involve actually clarifying policies, but often simply involves improving existing informational resources, like websites and admissions packets. This can also involve more pro-active outreach, such as having admissions staff visit education/training partner sites to present to prospective students, answer questions, and even help with the admissions process.

- **Consider co-locating Adult Basic Education, community-based training programs, and other services for adult learners on campus.** Co-locating services can help foster relationships and trust between college faculty/staff and staff from other programs. It can also give students involved in those programs greater familiarity with a college campus and help them envision themselves as college students.

- **Re-assign work responsibilities to maximize advisor/navigator effectiveness.** By moving transactional, process-oriented tasks off of advisors' and navigators' plates and into the purview of other administrative staff, advisors and navigators are afforded more time to do student-centered advising and/or navigational work.

- **Host Events Specifically for Adult Learners.** This can be a way to share information on campus resources, help adult learners build community, and get input from adult learners. Providing child care, food, and swag bags can help boost attendance.

- **Review and improve the college website, informational materials, and other communications** to ensure they are accessible, easy to find, written clearly, and culturally responsive. Re-write form letters to students to be less formal and more positive in tone. For email correspondence, use students' personal email addresses, since many students do not check their college accounts.

- **Review and improve college policies and procedures** to ensure they are accessible, easy to find, written clearly, culturally and gender responsive, and supportive of adult learners.

- **Put student needs first, and use student feedback to improve.** For example, you can use pre and post surveys to collect feedback, which can be used to understand student needs and make decisions about future programming. Campuses should consider aligning programming (e.g., its time, location, and calendar / length) to student needs rather than staff or institutional needs.

- **Do not assume that all students have access to technology and tech literacy.** Make resources available to students either on-campus, via loan, in other formats, or for free/reduced price.

- **Make sure required books are available on reserve at the library**. Many adult students cannot afford to buy textbooks and are unaware of Z degrees, which help students avoid the cost of textbooks when enrolled in certain Z degree-designated courses (www.minnesota.edu/z-degree).

- **Review policies around record/financial holds**. At some colleges, even a small balance due can result in a financial hold that blocks a student from registering for classes or graduating. Consider increasing the threshold at which a financial hold occurs, or offer students options for paying off their balance over time.

# Money Stuff: Tips on Financial Aid and Financial Holds

An entire book could be written about the ins and outs of financial aid. A number of tools and online resources can provide more in-depth information, and a college's financial aid office is often the best place to go regarding specific questions. That said, in this section we'll relay a number of facts and tips we gathered from the field.

## Financial Holds, Record Holds, Procedural Holds

A financial hold (or record hold) can be applied to a college student's account if an outstanding balance is owed. A procedural hold is similar, but can be applied when a particular procedure has yet to be completed (this can be something as mundane as having overdue library books).

- As long as the hold is in place, the student is unable to do basic things like register for classes or graduate. In addition, financial holds can follow a student across colleges in the Minnesota State system.
- Financial holds are often a major barrier to student progress. If a student has prior college experience, often a financial hold will be waiting for them as soon as they re-enroll in college.
- If a student cannot afford to pay their outstanding balance, there may be other options for removing the hold. There is an appeals process, but this process can be onerous. It helps to have a navigator to help facilitate the process.
- Colleges can reduce the threshold at which financial holds take place. For instance, as part of the MN Reconnect Program, participating colleges increased their financial hold threshold from $250 to $500, meaning that financial holds would only be placed on student accounts owing more than $500. This reduced the number of student accounts placed in "hold" status.
- Both colleges and CBOs should consider using financial resources to help students pay down financial holds.

## Fees and Waivers

An adult learner may encounter a whole host of fees in addition to tuition. Many of these fees are unexpected and can be enough to impede a student's progress. A navigator can play an important role in identifying whether there is flexibility or opportunity to waive fees, and if so, provide support for the waiver process.

## Federal Financial Aid

**Pell Grant Considerations.** Pell Grants are the primary source for financial aid among college students; they are ideal because, as grants, they do not need to be paid back. But it's important to note that many adult learners are not eligible for Pell Grants. This is because Pell Grants are primarily targeted at full-time students, as well as students who have very low incomes. If an adult learner works—and most do—they are likely to have income that jeopardizes their eligibility; they are also likely to attending school part-time, which further jeopardizes their eligibility.

**Avoiding FAFSA Pitfalls—Start Early.** The FAFSA (Free Application for Federal Student Aid) is a form used to determine eligibility for federal (and state) financial aid programs. The main thing to know about the FAFSA is that it can be daunting. It's smart to get started early on the FAFSA with students, to ensure they pull together all the required information and documentation with time to spare. Completing the FAFSA can be a major barrier for students, as they often wait until the last minute to fill out the form, which is risky.

**Loan Rehabilitation.** Another barrier that adult learners might face is having outstanding student loan debt that they have defaulted on. In this case, loan rehabilitation might be an option. It is a one-time option that allows students to pay back their student loan debt in small installments, which puts the student back in good standing, allowing them to become eligible for further federal financial student aid.

**Net Price Calculators.** Colleges are required have "net price calculators" on their websites that allow prospective students to enter information about themselves to find out what students like them paid to attend the institution in the previous year, after taking grants and scholarship aid into account.  Note that Foundations manage scholarship dollars and often have fewer applications than funds available.

# Ability to Benefit

Ability to Benefit (AtB) is a provision in the Higher Education Act (HEA) that

- allows a student who has not received a high school diploma or equivalent (HSD/E) to be eligible to enroll, and also to receive Title IV Federal student aid,
- requires enrollment in an approved career pathway,
- requires continued progress towards the high school credential and college career pathway,
- requires participation in supportive services, e.g., orientation, career guidance.

There are three AtB pathways that adults with no high school diploma or equivalent may use to show ability to benefit from a college education, allowing them to enroll at a college campus. These are:

1. Pass the AtB acceptable academic assessment (ACCUPLACER) or other entrance exam
2. Complete six college credits, usually funded by the student
3. Meet the requirements of the Minnesota State Ability to Benefit Process, approved in August 2022 — includes the above options, plus multiple measures and Guided Self Placement (GSP)

Prospective students may wish to complete both a high school diploma or equivalency while completing a career pathway on a college campus. The diploma/equivalency programs available through ABE are Credit Completion, Standard Adult Diploma and GED and will soon include the Hi-SET. This kind of dual enrollment may represent a critical pathway that tens of thousands of Minnesotans could take advantage of, gaining needed academic skills, a high school credential, and working toward workforce preparation leading to a living wage job.

**Why is the AtB provision important in Minnesota?**

- Approximately 304,899 Minnesotans aged 18 years and older have not earned a high school diploma or equivalent (HSD/E).[25]
- Disproportionately, those without an HSD/E are Black, Native American and Hispanic.[26]
- Adults without an HSD/E earn half the average of those with a bachelor's degree.[27]
- Minnesota is "[f]acing a workforce shortage of 239,000 workers" and at the same time "has some of the most dramatic disparities in employment by race and ethnicity in the nation."[28]
- The 2015 Minnesota Legislature enacted a state goal that says 70 percent of Minnesota adults (age 25 to 44) will have attained a postsecondary certificate or degree by 2025.[29]

AtB can make a critical difference in the life of an adult with no HSD or equivalent.

This case study example, from https://sites.ed.gov/octae/2015/06/05/new-guidance-on-ability-to-benefit/, describes the difference the AtB enrollment option can make in a prospective student's life.

> *"At age 21, Tony is the oldest of five children in a single parent household. He had to drop out of high school at age 17 to work full-time in order to help support his younger brothers and sisters. For the next four years he had a succession of minimum wage jobs to help his family make ends meet. This experience reinforced what he had always heard—that in today's job market there is a need for postsecondary education and training in order to land a good job. So Tony met with an advisor at a local community college to explore his education options. To his dismay, Tony found that he would not be able to receive federal financial aid because he did not have a high school diploma or other*

[25] 2019 U.S. Census data for Minnesota
[26] Minnesota Office of Higher Education, 2016, Educating for the Future
[27] National College Transitions Network, https://www.collegetransition.org/career-pathways/featured-projects/ability-to-benefit/
[28] MNCompass, https://www.mncompass.org/data-insights/articles/minnesotas-workforce-shortage
[29] Minn. Laws 2015 Chapter 69 Article 3 Sec. 6, cited in Minnesota Office of Higher Education, 2016, *Educating for the Future*

*high school credential, such as a GED. Discouraged by this news, Tony gave up hope of being able to help his family better its circumstances."*

Instead, imagine that Tony knew about and pursued the AtB provision at his local community and technical college.

*"Tony went back to the community college and was told he could enroll in a career pathways program and receive Title IV federal financial aid if he met certain prerequisites. He had the option of taking a U.S. Department of Education-approved, independently administered test, or he could pay for and complete at least six credits (or 225 clock hours) counting toward a degree or certificate at the community college. Tony decided to take the test and scored high enough to meet ATB alternatives requirements. He then completed the financial aid application process and was found to be eligible to receive aid. Finally, Tony enrolled in an eligible career pathways program, which included counseling and support services to help him identify and attain his academic and career goals. The program also provided articulated, contextualized (i.e., relevant to his field of study) course sequences that allowed Tony to consistently advance to higher levels of education and employment. It was structured very efficiently—everything Tony studied prepared him to be successful in his new field, as well as to earn industry-recognized credentials and an associate degree. The program was developed in collaboration with local employers in Tony's field, as well as workforce and economic development partners, and was filling a vital need in Tony's region. As part of his career pathway, Tony enrolled in and completed an adult education program that helped him prepare to be successful in work and in life."*

Note in this example that the ACCUPLACER test levels to qualify as a AtB students are not the same as levels set for traditional course enrollment. This is because of the additional services and partnership with Adult Basic Education in serving these students. Students using ACCUPLACER to qualify for AtB must achieve the scores below in all three areas to quality. In Minnesota, the current Ability to Benefit levels when testing with ACCUPLACER are:

Next-Generation ACCUPLACER:

- Reading Comprehension (233)
- Sentence Skills (235)
- Arithmetic (230)

Classic ACCUPLACER:

- Reading Comprehension (55)
- Sentence Skills (60)
- Arithmetic (34)

College staffs and their partners need to consider the above scores carefully when advising students. Programs should be identified that are accessible to AtB students. It is feasible, that students may get sufficient ACCUPLACER scores to be accepted into college, but not score high enough to register for needed classes. Planning and advising of students can prevent this situation. The newly approved Minnesota State Ability to Benefit Process provides increased flexibility for colleges, ABE partners and students in accessing and managing AtB.

**Policy/ Procedure information is available in Minnesota State System Procedure 3.14.**
*For more information on Ability to Benefit in Minnesota State, contact* ***Jess Niebuhr,*** *System Director for Strategic Partnerships, at jess.niebuhr@minnstate.edu*

# Recruiting Students: Considerations, Best Practices, and Examples

Despite statistics that large increases in the adult learner population and in labor market demand for their skills, one of the biggest challenges reported by pathways partnerships is a lack of students to fill courses. There are many reasons for this mismatch, from COVID to system shortcomings to the profound barriers adult learners face. While other parts of this toolkit address those challenges, here we focus directly on how we engage and recruit adult learners.

## Strategies for Engagement: How and Where to Find Adult Learners

- **Leverage learner word-of-mouth.** Ask current and former students to engage their communities. For instance, students can make announcements at their places of worship or at other community groups; have staff attend these meetings to answer questions. You can also encourage students to talk to their families and friends and refer them to your program.

- **Build partnerships with other organizations serving working learners**. Think about who serves and/or interfaces with adults and families in your community, and engage them. Present at their meetings, build relationships, provide program information, and create referral processes. Some examples:
    - Libraries and community centers
    - WorkForce Centers (CareerForceMN.org)
    - Career fairs
    - Community restaurants, coffee shops, and gathering spots
    - Other departments within your own organization
    - Social services agencies
    - Neighborhood organizations
    - Culturally-specific organizations
    - Minnesota State Centers of Excellence (see www.minnstate.edu/coe/)
    - Organizations serving veterans and servicemembers (see page 113)

- **Engage or build "onramps."** Have ABE instructors or CBO trainers whose courses could feed into yours promote your program in their classes. Consider offering bridge courses that could engage new populations and bridge into your existing program(s).

- **Engage employers, trade organizations, unions, and industry groups.** Current employees are good population to draw from, often with distinct training needs and clear opportunities for employment and/or advancement.

- **Use social media.** Invite students to follow or like the program's social media accounts. Spotlight partnerships and student successes on social media as a way to reach their networks. Create incentives for students to mention your program on social media. Get photo releases so you can readily share photos and video.

- **Outreach to Traditional Media.** Press releases around specific events and stories (announcements of new partnerships, graduations, compelling student success stories) are a great way to drum up interest from traditional media (newspapers and TV news). Make sure to think past the largest outlets and publications to smaller, community-oriented ones.

- **Be Present at Community Events.** Have booths at popular events around the year to educate the community about what your program offers. Engage students as spokespeople for your organization.

## Crafting the Message

- **Use testimonials.** Adult learners are more likely to listen to someone they relate. Testimonials can be anything from short quotes to longer pieces (print or video) that tell a student's story and demonstrate the effectiveness of your program.

- **Avoid jargon.** Make sure to use clear and simple language, avoiding jargon wherever necessary. Jargon can be hard to spot, so ask a friend from a completely different field to review your communications. Also, make sure to put things in real-world terms that adult learners can understand. For instance, instead of saying, "this course offers X credits", say "this course lasts X weeks and is equal to a semester-long college course".

- **Create an "elevator pitch".** You might be able to talk at length about the virtues of your program, but it's important to be able to distill the main points down to something as short as 30 seconds. Put yourself in the place of your audience. What are the 1-2 main things you would want them to come away with? If you had, say, three minutes, what more would you say then? Having "pitches" of varying length can come in handy, and the same goes for written versions as well. You might have a full-page handout for most occasions, but what if you can only submit one paragraph for a community newsletter?

- **Acknowledge the needs of adult learners.** To the extent your program addresses the needs of working learners, make sure your communications do to, Think about the primary things on an adult learner's mind, and make sure to address each. For instance:
    - **Saving time and money:** "Our program helps you get through college in less time, which also means less money for tuition." "Our program helps you master basic college skills at no cost, so you can save your money for more advanced classes."
    - **Flexibility and convenience:** "Our courses are taught on evenings and weekends (or online) and you can we are located on the Metro Transit 21 Bus line." "You can complete your work at your own pace."
    - **Relevance.** "Our classes teach you skills that are in high-demand and lead to high-paying jobs" "Our program is tailored to your individual interests and skills." "Our program includes an internship where you'll get real-world experience and connections to local employers." "Our program is designed to teach important math and reading skills in relation to a number of specific career fields."
    - **Support and Empathy.** "Our program is designed for busy students balancing family and job responsibilities." "Our classes are tailored students who may have struggled in school; we offer additional academic support and one-on-one tutoring." "Our program helps you find your path to college, providing supports like childcare and tuition assistance so you succeed."
    - **Building on Real-World Experience.** "Our program gives you credit for your work experience so you can jumpstart your college studies." "Our program builds on what you already know, so you're learning valuable skills on day one."

- **Be specific.** Make sure to detail the skills students will learn, as well as the commitment required by the program.

## MN Forward Together: Addressing Adult Learner Questions and Concerns

*Minnesota's Forward Together initiative (www.mnforwardtogether.com) helps train volunteer ambassadors to spread the word about educational and training opportunities for adults, acting as catalysts who open the door to a conversation with someone who may not have known how—or with whom—to start the conversation themselves.*

We encourage you to learn more about MN Forward Together; in the meantime, here is a helpful passage from the MN Forward Together Ambassador Toolkit that identifies and answers common concerns from adult learners[30]:

***"I'm afraid I won't fit in."***
There are more people just like you on college campuses than ever before. There are many talented and accomplished individuals who never went to college or who started but for some reason or another were not able to complete their degree. For many, earning that degree can make a significant difference in their professional and personal life, but the idea of returning to school after a long absence can present quite a challenge. Here is a look at today's college student:[31]

- 37% of college students are 25 or older
- 46% are first-generation college students
- 40% of college students work full-time
- 24% of college students have children or other dependents
- 6% serve or have served in the U.S. armed forces

***"I had a bad experience in college the first time around."***
You should know that many things have changed since you first attended college. First, *you* have changed. You may not have felt ready for college when you attended right out of high school, but at this point you've lived life, you have responsibilities and motivation, and you've made sacrifices along the way. That makes you more ready now than you've ever been.

Second, colleges have changed. Colleges in Minnesota are working on ways to make their campuses friendlier for adults. Many are offering support in the form of financial and academic planning, career assessments, peer advising, and web access to important campus resources such as financial aid and computer skills workshops.

***"School just doesn't fit into my life right now."***
There has never been a better time for adults in Minnesota to complete a certificate or degree. Minnesota institutions have a variety of flexible degree options and many are focused on supporting adult learners. Employers are also looking for individuals who can demonstrate concrete skills for their higher paying positions.

***"I don't have time to go back to school."***
There are many different programs and options for adults interested in furthering their education. Institutions also have flexible course and degree offerings such as online classes, accelerated programs, adult degree completion programs and branch campuses which offer more convenience to fit your schedule.

***"How much will college cost, and how will I pay for it?"***
Unfortunately, there is no perfect equation to figuring out how much college will cost you. That's because your college costs will depend on what school you choose to attend, what type of credential you choose to pursue, and how much assistance you receive through scholarships and financial aid.

Be sure to check out "net price calculators" on college websites. Institutions are required to provide this information, and these calculators provide an estimate of what your college costs might actually be at that college as it takes into account grants and scholarships you may receive.

Here is an example of one such calculator from Minnesota State Community and Technical College:
https://www.minnstate.edu/admissions/calculator/msctc.html

***"What is financial aid?"***
Financial aid is intended to fill the gap between the actual price of the school and what students (and, in the case of dependents, their families) can realistically contribute from savings and income to pay for this education. This is called financial need. It allows students to attend schools that they otherwise might not be able to afford. The student, the student's family, and taxpayers (through financial aid) share responsibility for paying for higher education.

[30] https://mnforwardtogether.com/
[31] https://www.luminafoundation.org/campaign/todays-student/

Financial aid is available to most students and comes in three forms:

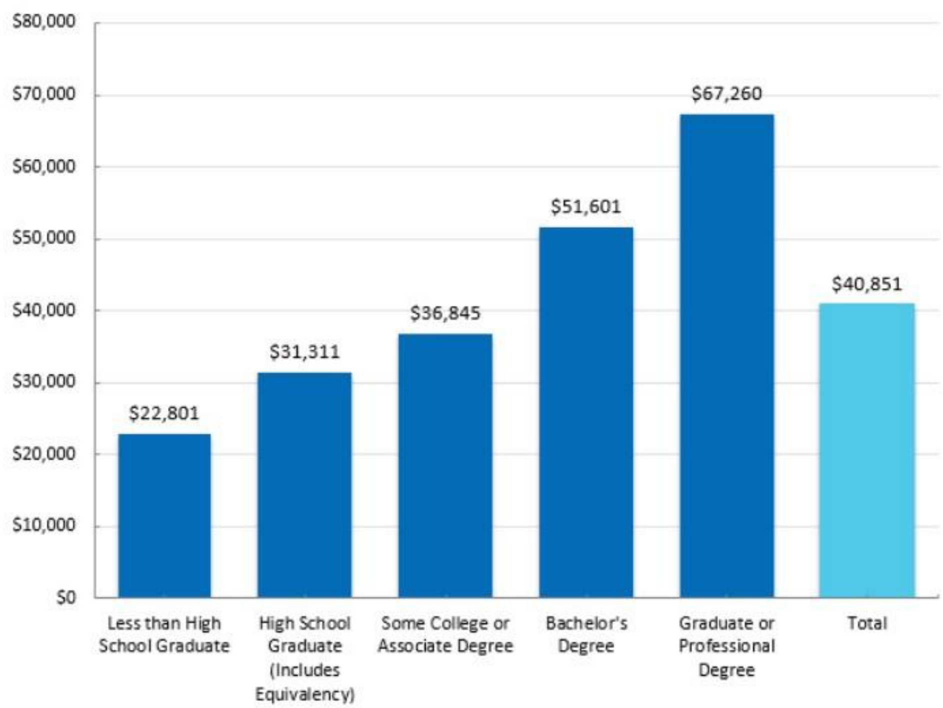
- Financial aid you don't repay (grants and scholarships): http://www.ohe.state.mn.us/mPg.cfm?pageID=1296
- Financial aid you must repay (loans): http://www.ohe.state.mn.us/mPg.cfm?pageID=1297
- Financial aid you earn (work study and community or military service): http://www.ohe.state.mn.us/mPg.cfm?pageID=1298

Most students receive a combination of these in what's called a financial aid package that is put together by the school the student plans to attend or is attending.

***"How will continuing my education affect my career, job prospects, and other outcomes?"***
Data show that as educational attainment increases, so does income (Figure 1). Additionally, the employment rate also increases with educational attainment.

## Median Income Increase with Educational Attainment

*Minnesotans Age 25 and Older, 2015*



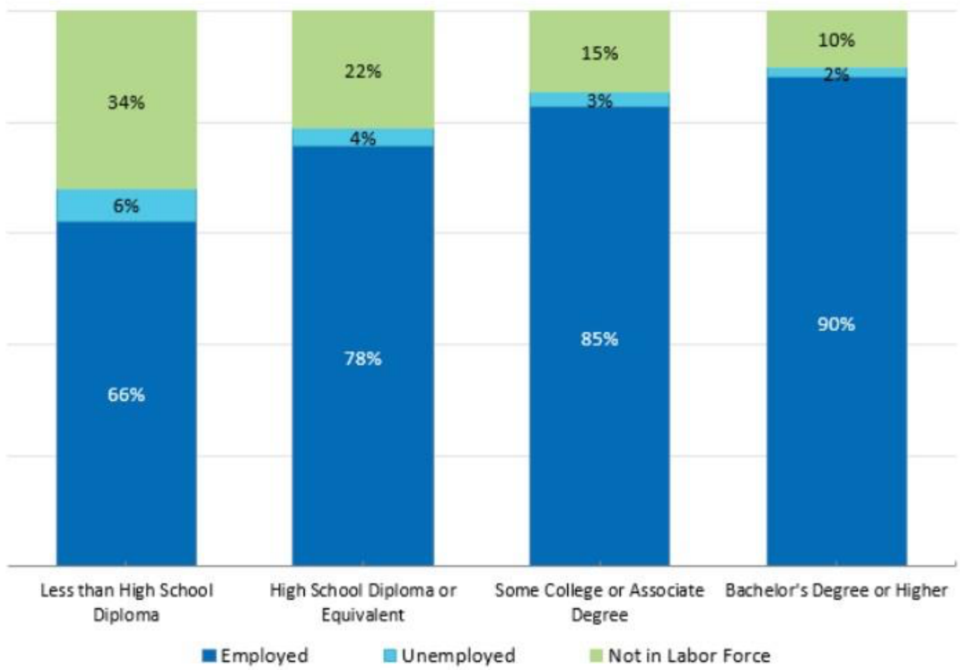

Note: "Some College" also includes those who completed one- or two-year certificate programs.

Median income in the past 12 months in 2015 inflation adjusted dollars.

Source: U.S. Census Bureau, 2015 American Community Survey 1-Year Estimates

## Employment Rate Increases with Educational Attainment

*Minnesotans Age 25 to 64, 2015*




Note: "Some College" also includes those who completed one- or two-year certificate programs.

Source: U.S. Census Bureau, 2015 American Community Survey 1-Year Estimates

Individuals with a postsecondary degree or certificate have a higher ability to withstand a poor economy with a secure job. In the country's 2008 recession, workers with a high school education or less lost more than 5.6 million jobs, while workers with an associate degree or some college lost 1.75 million jobs. Those who already had postsecondary education also recovered more quickly from the recession. In 2015, individuals with only a high school diploma made about $35,000. Compare this to individuals with associate degrees, who made about $41,000, and individuals with bachelor's degrees, who made $59,000.[32]

Getting a degree can also have a generational effect: "one-third of first-generation students dropped out of college after three years, compared to 14 percent of their peers whose parents had earned a degree."[33]

***"I don't know if I am ready to return to school."***

Going back to school as an adult can be a daunting experience, but it is also a very worthwhile one.

In fact, there are more people just like you on campuses in Minnesota than ever before. There are many talented and accomplished individuals who never went to college or for some reason or another were not able to complete their degree. For many, earning a degree or credential can make a significant difference in their professional and personal life, but the idea of returning to school after a long absence can present quite a challenge.

In Minnesota, there are many resources within your community and at our public and private not-for-profit institutions to help assist you in your decision and support you through to completion.

Search this map for Minnesota colleges and career schools: http://www.ohe.state.mn.us/sPages/instMap.cfm

[32] https://cew.georgetown.edu/cew-reports/recovery-job-growth-and-education-requirements-through-2020/

[33] https://www.insidehighered.com/news/2018/02/08/students-postsecondary-education-arcs-affected-parent s-college-backgrounds-study

# Curriculum Alignment and Course Design

Adult pathways partnerships almost always involve the alignment of curriculum and learning outcomes, usually between a non-credit training and a college-credit bearing course or program. In turn, the alignment of curriculum tends to be accompanied by efforts to design or re-design courses, often augmenting existing educational offerings to ensure they are well-aligned to credit-bearing equivalents.

Here are a few examples of curriculum alignment and course design:

- A CBO working with a college to alter and enhance its training curriculum/instruction to provide successful students an opportunity to earn college credit via CPL assessment.
- An ABE provider working with a college to translate its learning outcomes and syllabus in terms of college learning outcomes, to facilitate the placement of successful ABE participants into a specific college course or program.
- A college crosswalking one of its courses to an existing CBO training in order to build a pathway into the college, ensuring prospective students are likely to succeed with further college study.
- A CBO working with an employer and a local college to design an internship program that is credit-bearing.

Curriculum alignment work can ensure that one course flows into another, or to demonstrate that two courses are equivalent, or to aid in the development of assessments and placement agreements (see page 97).

## Identifying Opportunities for Curriculum Alignment

For partners looking for opportunities to align education and training offerings:

- **Leverage Industry-Recognized Credentials.** Cross-walking courses is easier if both courses are designed to culminate in the same industry-based credential.

- **Adapt to the College.** ABE and CBO partners can take an initial step toward alignment by incorporating curriculum and materials used by the college, building trust in the quality of their content and instruction and demonstrating their commitment to partner. At the same time, college partners should seek to understand ABE perspectives and objectives, helping them to present their curriculum in a college context, for example by helping ABE partners to learn how to write a course syllabus.

- **Look at Existing Assessments.** Non-college partners can also start by looking at existing assessments used by colleges and analyzing how well they align to current training offerings.

- **Consider the Industry.** Alignment work is often easier when attuned to a specific industry, particularly those that have a lot of stackable credentials and transferable skills. For instance, one local partnership decided to build a program around the OSHA 30 certification because:
    - It articulates/leads into a number other fields, such as welding, construction, and HVAC, including at multiple colleges in the area.
    - It's an industry-recognized credential that contributes immediately to participants' job-readiness without further postsecondary education.
    - It builds nicely on the common OSHA 10 class.
    - More success aligning to college progs more specifically attuned to industry, like auto and construction, where there's already lots of stackable creds

- **Consider Student and Employer Demand.** Alignment work is often most successful when it serves the interests of both students and employers. Look for opportunities to create adult learner pathways in fields desirable to students and in high-demand from employers.

## Course Design Tips and Considerations

- **Align to College Calendars.** Moving instructional calendars to a semester calendar can be helpful. It allows non-college courses to align more readily to campus classes and schedules. It may also be a better fit for adult learners, who may prefer courses with longer timeframes and fewer hours required per week in order to better manage family and work responsibilities.

- **Rolling Enrollments and "Onesies."** Some colleges and other training providers have explored allowing rolling enrollments to allow students to join a class at any point in time. Others have moved toward offering some courses as "onesies"—online training/education offerings that can be administered to single students, a la carte style. Both of these approaches are dependent on the nature of the curriculum and instruction being considered.

- **Create Bridges and On-Ramps.** Partners can better serve learners who need additional pre-college-readiness skills by creating an "on-ramp" class with easier academic benchmarks to serve as a bridge into an existing program. Having a bridge-level class may enable more learners to take advantage of the existing program.

- **Combine Training and Navigation Coursework.** Navigation is crucial to college readiness and success (see page 41), so it makes sense to integrate into college readiness coursework. Usually, such a course will focus more on instruction at the beginning, with navigation increasing toward the end of the course, as students approach college enrollment.

  - Some content areas—especially those that are industry-specific—lead to a very specific set of college programs and thus require less navigation. Conversely, other areas of study—"leadership", for instance—are more general and can lead to a variety of postsecondary options, which can make navigation work more time consuming.

- **Modular, Stackable, Mastery-Based.** Masterly-based learning[34] is a promising approach that is highly-personalized and honors learners' assets and experiences. Students take ownership of their learning and receive differentiated instruction based on their interests and needs. Often, mastery-based learning is modular and/or stackable in design. Semester-long courses are organized into smaller chunks based around learning outcomes, with assessments and standards for each. Modules can be completed at the learner's pace, working with faculty to set timeframes and deadlines.

- **Re-Thinking Deadlines.** Course deadlines are important, but can also be stumbling block. "Suggestive deadlines" can be helpful to adult learners by providing flexibility, but they should be used thoughtfully and with a focus on learner outcomes. Working with each student individually to set deadlines can provide a venue for getting to know the student (and their needs and strengths) better, which can inform instruction and assessment.

- **Traditional vs Mastery-Based Learning**. Increased mastery-based instruction being offered (alongside traditional instructional options as well), spurred on by increased online course-taking. Let students show what they know. Break down class into modules, which are in order.

- **Partner with Other Instructors and Navigators**. Take time to work with your colleagues to share promising practices, observe each other's instructional approaches, and workshop learner issues as they arise.

[34] For Washington State's statutory definition of mastery-based learning, see https://www.sbe.wa.gov/faqs/mastery_based_learning. Another useful summary is available at https://portal.ct.gov/SDE/Mastery-Based-Learning/10-Principles-of-Mastery-Based-Learning

# Building Crosswalks

Crosswalks are documents (often spreadsheets) that clearly compare and analyze the learning outcomes of two or more educational offerings, focused on identifying both equivalencies and gaps in learning outcomes. Crosswalks help partners:

- Assess early on whether two educational offerings are good candidates for further curriculum alignment work.
- Determine, in specific terms, the extent of alignment between two educational offerings, and identify where curriculum needs to be developed to achieve greater alignment.
- Inform the development of assessments of learning outcomes and serve as the basis for placement agreements between partners (see page 97).
- Match an industry credential to a course for the purposes of placement or assessment for credit for prior learning.

## Translation Work

As a preliminary step, non-college partners may want to "translate" their course descriptions, learner outcomes, and syllabi into terms college faculty can understand and work with.

**Common Course Outlines (CCOs)**

Minnesota State Colleges and Universities use Common Course Outlines (CCO)[35] to "translate" and compare their own courses, by identifying their fundamental building blocks in a standard way. CCOs are required for accreditation, and available on the web for all Minnesota State courses. CCOs provide the following information on a course:

- A brief course description
- Major content areas covered by the course
- Learning outcomes of the course
- Methods for evaluating student learning

**CCOs as a Template and Resource**

CCOs are useful for non-college partners—they can help you find a college course to crosswalk, and they can help you translate your own courses. They provide a good template for clearly defining and communicating your courses in a way that will be immediately familiar to college faculty. College course syllabi can be similarly instructive.

## Crosswalking Steps

As illustrated in the graphic on the following page, the basic steps of creating a crosswalk are:

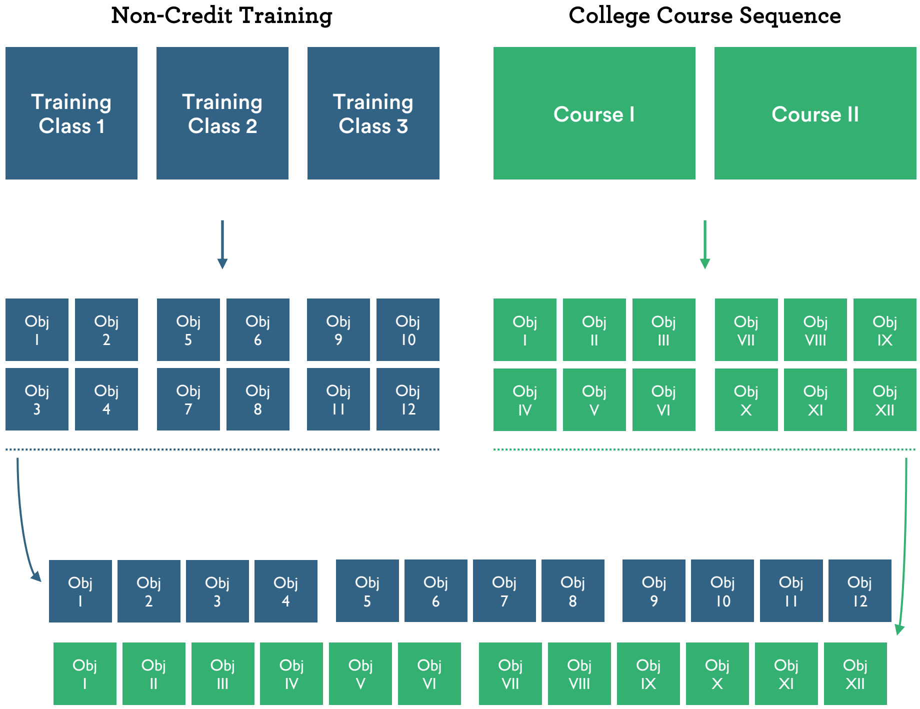
- **Step 1.** Break down the given classes into their learning outcomes and/or major content areas.
- **Step 2.** Put the learning outcomes side-by-side, to facilitate analysis. There are a few ways to do this, but typically a spreadsheet is used to create a matrix of learning outcomes (see page 78 for examples)
- **Step 3.** Analyze how the learning outcomes correspond. Indicate where learning outcomes coincide, and where there may be gaps or misalignment. In particular, look for college course outcomes that are not currently addressed by the other, non-credit training program.
- **Step 4.** Use the analysis to identify opportunities to align curriculum to facilitate placement pathways and/or opportunities for credit for prior learning. For instance, the training provider might augment or adapt its training classes, or the college might re-structure or modularize its

[35] Terminology can vary from campus to campus. Some institutions use the term "Master Course Outline" or simply "Course Outline" instead of "Common Course Outline."

curriculum to enhance alignment. A third option might be to pursue partial credit strategies—awarding successful training participants partial college credit, or placing them mid-course.

Along the way, the college needs to determine the percentage of alignment needed for the college to accept the non-credit-bearing training as CPL. For example, RCTC requires that 75% of the credit course learning outcomes must be present and assessed in the non-credit training.

# Building a Crosswalk: An Illustrated Guide

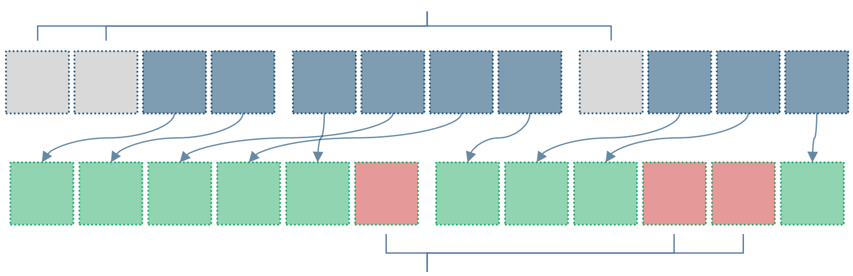



In this example, a sequence of non-credit training classes is being crosswalked to a two-course college program. The crosswalk will help us determine how aligned the two programs are, informing further curriculum alignment, course design, placement and assessment design work.

**Step 1.** Break down the given classes into their learning outcomes—the fundamental building-blocks of curriculum. Education providers use a variety of frameworks to express their learning outcomes, from College and Career Readiness Standards (CCRS) in ABE, to Common Course Outlines (CCOs) used by all Minnesota State Colleges and Universities.

**Step 2.** Put the learning outcomes side-by-side, to facilitate analysis. There are a few ways to do this, but typically a spreadsheet is used to create a matrix of learning outcomes (see the following pages for examples).

These learning outcomes don't correspond to any in the credit-bearing courses. One option might be to pull these out and combine them into a "onramp" course offered before the existing training sequence.

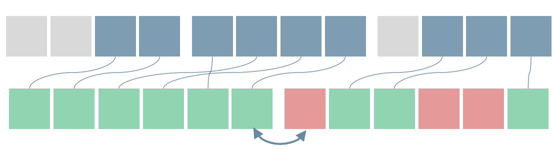


These learning outcomes are not addressed by the existing non-credit trainings.

**Step 3.** Analyze how the learning outcomes correspond. In an ideal world, there would be a one-to-one correspondence for every learning outcome, meaning that the non-credit training could be considered equivalent to the college course sequence. But this is rarely the case.

In this example, there is some misalignment. For instance, there are three training outcomes (in grey) that do no correspond to any of the college course outcomes. And there are three college course outcomes (in red) that are not currently addressed by the non-credit training program.

The training provider could consider adding content to one of its classes to fill in these gaps. Alternatively, the college might consider re-organizing its courses so that all learning outcomes of Course I are fully addressed, like this:



In this case, learning objectives VI and VII are swapped. Trainings 1 & 2 are now equivalent to Course I.

**Step 4.** Use the analysis to identify opportunities to align curriculum to facilitate placement pathways and/or opportunities for credit for prior learning. The training provider might augment or adapt its training classes. The college might re-structure or modularize its curriculum to enhance alignment. A third option might be to pursue partial credit strategies—awarding successful training participants partial college credit, or placing them mid-course—though existing college policies and procedures may affect the feasibility of these options.

## Crosswalk Example #1: IIMN-TPI-Minneapolis College Professional Leadership to Business Management Pathway

**About the Professional Leadership to Business Management Pathway**
The Professional Leadership Pathway is a semester-long training program offered by International Institute of Minnesota (IIMN), combining a three-month paid internship offered by TPI Hospitality and the opportunity for students to earn college credit in three courses that can count towards Minneapolis College's Business Management degree programs. The partnership uses CPL equivalency and assessments (completion of the leadership class and internship earn students 1 college credit. The leadership class also prepares students to take an external assessment (optional) for three additional courses: BUSN 1140 – Intro to Business, BUSN 1150 – Business Computers and BUSN 1154 Business Communications) and builds on the transfer credit model to award college credit to successful participants in the program.

Building the partnership involved comparing existing curricula and learning outcomes, folding in relevant job descriptions from TPI, and augmenting the IIMN curriculum as necessary (including an internship at TPI) to ensure its equivalency with one college course and to prepare students to take assessments in three additional college courses

Here we provide an example of how a crosswalk analysis was used to assess pre-existing alignment between to the two training programs and the TPI job description, and identifying "gaps" in curriculum that needed to be filled to make sure the course lined up tightly, allowing students to earn college credit via CPL.

**Step 1: Identify Learning Outcomes of Existing Courses**
On the college side, learning outcomes were identified for Minneapolis College's Entrepreneurship Certificate Program, both program-wide learning outcomes as well as outcomes for the individual courses in the program:

Entrepreneurship Certificate Program Learning Outcomes

| **Program Learning Outcomes** | Utilize team building and project management skills. | Demonstrate entrepreneurial spirit that leads to success of real life business creation. | Analyze organizational strengths and weaknesses that demonstrates the competitive environment when launching a new company, product, or service. | Communicate ethically and effectively to maximize productivity, profitability and motivation. | Apply the planning, leading, organizing and controlling functions of a business. | Develop a professional marketing plan that involves the launch of a new product or service that benefits society. |
|---|---|---|---|---|---|---|

Learning Outcomes for Entrepreneurship Certificate Courses (19 credits)

| **BUSN1140**<br>**Introduction to Business** | **BUSN1154**<br>**Business Communications** | **BUSN2306**<br>**Business Internship** |
|---|---|---|
| Explain the business environment both locally, nationally, and internationally | Expresses concepts efficiently and effectively both in oral and written form | Apply previous coursework to a real-world setting |
| Understand how business are formed and organized | Manipulate and write various correspondence in multiple mediums | Develop professional communication skills in real-world setting |
| Evaluate key skills to managing an enterprise | Explain and apply the four keys of effective communication (audience, purpose, message, style and tone) in various situations | Evaluate project's outcome |

| | | |
|---|---|---|
| Appreciate the role of labor within an organization | Select an appropriate medium and channel for communication | |
| Explore the importance of customer relationships | Employs high quality individual and group presentations | |

At the same time, learning outcomes for the IIMN's existing Professional Leadership Training program were identified. These learning outcomes were developed by working with IIMN's employer partner, TPI Hospitality, and based on TPI's Assistant General Manager job descriptions:

| IIMN Learning Outcomes |
|---|
| Define economics and describe types of economic systems |
| Identify ethical concerns in business |
| Apply business ethical standards to case studies |
| Identify the economic basis for international trade |
| Describe the extent of international business and outlook for world trade |
| Describe the advantages and disadvantages of sole proprietorships, partnerships and corporations |
| Describe the advantages and disadvantages of owning and operating a small business |
| Define Management |
| Explain leadership theories |
| Describe different types of organizational structures |
| Describe the primary functions of the HR Department |
| Identify how marketing adds value by creating utility |
| Describes major perspectives on motivation |
| Describes the components of a marketing mix |
| Recognize the importance of strong customer relationships |
| Differentiate between managerial and financial accounting and related career roles |
| Interpret Financial statements |
| Describe advantages and disadvantages of different methods of debt and equity financing |
| Define key business terms |
| Analyze the components of a business plan |
| Demonstrate effective presentation skills |
| Apply standards business communication techniques |

| Assistant General Manager Job Duties |
|---|
| Maintains a safe working environment and assure the safety of associates |
| Receive department-related guest complaints and ensure corrective action is taken |
| Meets or exceeds the highest standards and expectations of franchisors |
| Understands, endorses, teaches and enforces the TPI Hospitality Mission Statement, Vision Statement, philosophy, policies and procedures. |
| Participates in the review and evaluation of the performance and initiates pay changes |
| Participates in the orienting, training and development of personnel in his/her area |
| Achieves budgeted revenues and expenses, maximizing |
| Assures that room yield management attains the highest possible revenue per available room |
| Supervises, directs and motivates the efforts of personnel as directed |
| Identifies the need for disciplinary actions and participates in disciplinary activities as needed. |
| Increases the level of guest satisfaction by delivering an improved product through associate development, job engineering and high-quality image |
| Receives department-related guest complaints and ensures corrective action is taken |
| Audits and monitors all Front Desk Reports |
| Develops, gains approval of and implements budgets for his/her area of responsibility |
| Achieves budgeted revenues and expense, maximizing profitability |
| Follows and updates procedures for credit control and handling of financial transactions |
| Promotes the Organization, its plans, programs and achievements to the public and associates at all times. |
| Meets or exceeds the highest standards and expectations of franchisors |
| Final Paper |
| Final Presentation |
| Elite Mentorship Program |

### Step 2: Creating and Analyzing Crosswalks

Once learning outcomes are identified, they are combined into a matrix to identify areas of alignment and assess where further alignment will be necessary. Because this partnership involved two educational programs *and* an employer partner's position description, more than one spreadsheet was required. In this case, the crosswalk analysis was done by college faculty.

### Minneapolis College Curriculum <-> TPI's Position Description

Here, job duties are in the leftmost column, and for each, related learning outcomes from each of college course are identified, row-wise, in the remaining columns. Every populated cell denotes an area of alignment across one or more courses.

| Asst GM Job Duties | Business management Program Learning Outcomes | BUSN1140 | BUSN1154 |
|---|---|---|---|
| Maintains a safe working environment and assure the safety of associates | Apply the planning, leading, organizing and controlling functions of a business. | Explain the business environment both locally, nationally, and internationally | |
| Receive department-related guest complaints and ensure corrective action is taken | Communicate ethically and effectively to maximize productivity, profitability and motivation. | | Expresses concepts efficiently and effectively both in oral and written form |
| Meets or exceeds the highest standards and expectations of franchisors | Communicate ethically and effectively to maximize productivity, profitability and motivation. | Evaluate key skills to managing an enterprise | |
| Understands, endorses, teaches and enforces the TPI Hospitality Mission Statement, Vision Statement, philosophy, policies and procedures. | Communicate ethically and effectively to maximize productivity, profitability and motivation. | Evaluate key skills to managing an enterprise | Select an appropriate medium and channel for communication |
| Participates in the review and evaluation of the performance and initiates pay changes | Apply the planning, leading, organizing and controlling functions of a business. | Appreciate the role of labor within an organization | |
| Participates in the orienting, training and development of personnel in his/her area | Apply the planning, leading, organizing and controlling functions of a business. | Evaluate key skills to managing an enterprise | Expresses concepts efficiently and effectively both in oral and written form |
| Achieves budgeted revenues and expenses, maximizing | Apply the planning, leading, organizing and controlling functions of a business. | Evaluate key skills to managing an enterprise | |
| Assures that room yield management attains the highest possible revenue per available room | Apply the planning, leading, organizing and controlling functions of a business. | Evaluate key skills to managing an enterprise | |
| Supervises, directs and motivates the efforts of personnel as directed | Apply the planning, leading, organizing and controlling functions of a business. | Appreciate the role of labor within an organization | Explain and apply the four keys of effective communication (audience, purpose, message, style and tone) in various situations |
| Identifies the need for disciplinary actions and participates in disciplinary activities as needed. | Apply the planning, leading, organizing and controlling functions of a business. | Appreciate the role of labor within an organization | Explain and apply the four keys of effective communication (audience, purpose, message, style and tone) in various situations |

*Note: This example is for illustrative purposes; the full spreadsheet is not shown here.*

### Minneapolis College Curriculum <-> IIMN Professional Leadership Training

Similarly, learning outcomes from IIMN's training program are identified in the left column, with college courses again in the following columns. Here, you'll notice that an analysis is shown in the table's headers—specifically, the extent to which each college course's outcomes are addressed by the IIMN training. For instance, all of BUSN1140's learning outcomes are addressed by the IIMN training. For BUSN1154, three course outcomes are not addressed, suggesting that additional content/instruction may need to be added to the IIMN training to ensure the programs align. At the bottom, you can see which learning outcomes are not addressed for each college course.

| IIMN Outcome | Business Management Program Learning Outcomes (1 Outcome not addressed/covered) | BUSN1140 (all Course Outcomes minimally addressed/covered) | BUSN1154 (3 Course Outcomes not addressed/covered) |
|---|---|---|---|
| Define economics and describe types of economic systems | | Explain the business environment both locally, nationally, and internationally | |
| Identify ethical concerns in business | Communicate ethically and effectively to maximize productivity, profitability and motivation. | | |

| | | | |
|---|---|---|---|
| Apply business ethical standards to case studies | Communicate ethically and effectively to maximize productivity, profitability and motivation. | | |
| Identify the economic basis for international trade | | Explain the business environment both locally, nationally, and internationally | |
| Describe the extent of international business and outlook for world trade | | Explain the business environment both locally, nationally, and internationally | |
| Describe the advantages and disadvantages of sole proprietorships, partnerships and corporations | | Identify key trends and tools in business technology | |
| Describe the advantages and disadvantages of owning and operating a small business | Analyze organizational strengths and weaknesses that demonstrates the competitive environment when launching a new company, product, or service. | Understand how business are formed and organized | |
| Define Management | Apply the planning, leading, organizing and controlling functions of a business. | Evaluate key skills to managing an enterprise | |
| Explain leadership theories | | | |
| Describe different types of organizational structures | | Understand how business are formed and organized | |
| Describe the primary functions of the HR Department | | Appreciate the role of labor within an organization | |
| Identify how marketing adds value by creating utility | | | |
| Describes major perspectives on motivation | | | |
| Describes the components of a marketing mix | Develop a professional marketing plan that involves the launch of a new product or service that benefits society. | | |
| Recognize the importance of strong customer relationships | | Explore the importance of customer relationships | |
| Differentiate between managerial and financial accounting and related career roles | | | |
| Interpret Financial statements | | | |
| Describe advantages and disadvantages of different methods of debt and equity financing | | | |
| Define key business terms | | Explain the business environment both locally, nationally, and internationally | |
| Analyze the components of a business plan | Demonstrate entrepreneurial spirit that leads to success of real life business creation. | | |
| Demonstrate effective presentation skills | | | Employs high quality individual and group presentations |
| Apply standards business communication techniques | Communicate ethically and effectively to maximize productivity, profitability and motivation. | | Expresses concepts efficiently and effectively both in oral and written form |

| **NOT ADDRESSED/COVERED** | | | |
|---|---|---|---|
| | Utilize team building and project management skills. | | Explain and apply the four keys of effective communication (audience, purpose, message, style and tone) in various situations |
| | | | Manipulate and write various correspondence in multiple mediums |
| | | | Select an appropriate medium and channel for communication |

*Note: This example is for illustrative purposes; the full spreadsheet is not shown here.*

The Crosswalk and pathway are described below, including points of connection with the employer and college:

# Professional Leadership Pathway

**Where Life, Learning and Leadership Connect**

***A partnership of International Institute of MN, TPI Hospitality and Minneapolis College***

## Pre-College Connection Point

Location: International Institute of MN
Length of learning: 1 semester - Professional Leadership Training
Admission requirements:

- Foreign born
- Advanced English proficiency
- At least 6 months work experience in US
- Recommendation from teacher or supervisor

Competencies to be achieved:

- Understand and use level appropriate English grammar, punctuation, spelling and grammar
- Identify leadership style
- Digital Literacy through completion of NSDL modules.
- Learn and practice professional email and phone etiquette
- Understand Emotional Intelligence and it significance in the work place
- Be introduced to the basics of scheduling and forecasting
- Be introduced to inventory tracking and its importance
- Develop a philosophy of giving feedback
- Develop a philosophy of Customer Service
- Understand and practice the basics of teaching and training
- Develop and practice public speaking and presentation skills
- Learn and practice the basics of interviewing potential employees
- Conduct an Informational Interview
- Financial Coaching and budgeting basics
- Job Search basics; Interviewing, resume writing, goal setting for supervisor positions

Pathway Connecting points

- Be introduced to Minneapolis College Business programs through visit to College or Admission Counselor visit to classroom
- Be introduced to TPI Internship program through visit to TPI property and presentation by HR Specialist

## Employment Connection Point

Location: TPI Hospitality
Length of learning: 3 month paid internship
Admission requirements:

- Recommendation of TPI supervisor or IIMN staff
- Completion of Professional Leadership Course
- Foreign born
- At least 6 months work experience in US
- Interest in career in hospitality or food service
- Advanced English proficiency

Competencies gained:

- Real life work experience (minimum of 20 hours a week for 12 weeks)
- Gain experience in the hospitality industry by cross training across multiple areas in a hotel setting. Areas would include: Front desk, housekeeping, laundry, breakfast, maintenance, Human Resource shadowing (if interested), waterpark management (if able to travel to Maple Grove
- Gain leadership skills through TPI ELITE mentorship program
  - Be matched with a TPI Mentor
  - Meet twice a month with mentor to discuss goals and learning (1 hour per meeting)
  - Be engaged with leadership materials and resources suggested by mentors
- Completion of internship and all required approvals will be awarded 1 college credit at MCTC

## College Level Connection Point

Location: Minneapolis College
Length of time: To be completed within 1 year of internship completion date
Admissions Requirements:

- To be determined

Competencies that can be achieved

- BUSN1140 - Intro to Business (3 credits)
- BUSN1150 - Business Computers (3 credits)
- BUSN1154 - Business Communication (3 credits)

**Credits will be awarded after completion of assessments that are evaluated by faculty and staff*

Requirements:

- Completion of Professional Leadership Class
- Completion of TPI Hospitality Internship
- Completion and approval of Credit for Prior Learning Assessments
  - Student will be supported by IIMN staff throughout process
  - Students will connect with TPI staff and mentors who will support student in completion of assessments
  - Assessments will be approved by MCTC faculty

**Step 3: Building Out Curriculum and Assessments**
At this point, partners have the essential analysis needed to decide if and how to move forward. Sufficient alignment existed to pursue the development of a training pathway. College faculty worked with their Dean and other Continuing Education and Workforce Development (CEWD) staff at Minneapolis College to make some initial decisions:

- Successful completion of the IIMN training could be eligible for college credit via CPL learning assessment. Specifically, three courses were identified as equivalent to the IIMN training, with some augmentations made to curriculum to ensure sufficient alignment.
- An internship with TPI could also be eligible for CPL credit.
- The partnership applied for a small grant from Minnesota State's *All Learning Counts* initiative, which supported the development of CPL assessments (see page 106)

These complicated connections can be challenging to explain to prospective students.  IIMN developed a video for such purposes – video link.[36]

## Lessons Learned

Along the way, a number of lessons were learned:

- There were lots of unknowns, i.e., there is and no pre-defined process to follow, so partners had to create their own—persistence and continual learning are key.
    - For example, partners had to define a process for registering the IIMN students as a cohort, since the students did not individually apply to the college and were not already students there.
    - In this case, partners chose to build on the transfer credit model, where IIMN does the assessment and agreements define how assessment performance aligns with placement and the awarding of college-level credit.
    - Other processes that required definition included processes for submitting assessments for grades and how college credits are paid for.
    - At each step along the way, the process is being developed, tested, and refined—partners are continually learning and improving their work. For instance, after the first few students went through the IIMN program, partners were able to gauge if assessments needed tweaking and if college readiness outcomes were achieved. In turn, curriculum and instruction were bolstered and refined as needed.

- Terminology can be ambiguous or misleading, so it's important to unpack them early on to make sure everyone is on the same page.
    - In this case, partners wanted to use portfolios (with targeted assessments over each section of the portfolio) as their assessment method. But college policy required an "exam" for assessing external students, like those from IIMN.
    - It was unclear at first that "exam" is broadly-defined to include forms of assessment including portfolios. Once this was clarified, the partners' plan to use a portfolio-based assessment approach was able to proceed.

- The work of doing curriculum alignment and pathway-building was made possible by ongoing, active involvement by all partners, supported by modest grant funding and the willingness of college faculty to do work.

[36] https://www.youtube.com/watch?v=GVHGwMuv3XE

## Crosswalk Example #2: Digital Badging at Rochester Community and Technical College

College faculty at Rochester Community and Technical College (RCTC) used sabbatical time and a grant from the Minnesota State *All Learning Counts* initiative to develop "digital badges" for existing non-credit Microsoft Excel trainings to give students and opportunity for college-level credit via credit for prior learning (CPL).

RCTC's Administrative/Executive Office Professional (AOP) academic program offers credit-bearing courses leading to either an AOP Diploma or an AAS degree. Part of the AOP curriculum focuses mastery of Microsoft Excel skills.

At the same time, RCTC's Center for Business and Workforce Education (BWE), Winona State University's Adult and Continuing Education (ACE), and Hawthorne Education Center (ABE) offer a number of non-credit Microsoft Excel training courses.

Faculty from RCTC's AOP program set out to see if the existing non-credit trainings align sufficiently enough with AOP learning outcomes to facilitate the possibility of awarding college credit to successful completers through the use of CPL assessment.

As a first step, AOP faculty worked with partners to identify learning outcomes from BWE Office Technology Rep trainings. Then, spreadsheets were developed to crosswalk those learning outcomes with those of the credit-bearing AOP 1360-Microsoft Excel course.

In this first table, major with major content areas (MCAs) and learning outcomes (LO) from the three-credit AOP 1360-Microsoft Excel course are listed. For each, areas of alignment to BWE trainings are identified, by level (the BWE training is divided into three courses, or levels):

| AOP 1360, Microsoft Excel | |
|---|---|
| **RCTC Major Content Area** | **LO Alignment** |
| 1. Fundamentals of Microsoft Excel | Level 1 |
| 2. Entering data | Level 1 |
| 3. Formatting workbooks, worksheets, and data | Level 1 & 2 |
| 4. Basic formulas and functions | Level 1 |
| 5. Create and utilize templates | Level 2 |
| 6. Linking workbooks | Level 2 |
| 7. Charting | Level 1 |
| 8. Reorder and summarize data | Level 3 |
| 9. Beginning data analysis tools | Level 3 |
| | |
| **Learning Outcomes** | |
| 1. Describe spreadsheet software usage/applications | Level 1 |
| 2. Create workbook and worksheets | Level 1 |
| 3. Insert and format visual data objects such as, but not limited to, Charts and Sparklines | Level 1 |
| 4. Format worksheets to present data in a clear and concise manner | Level 2 |
| 5. Compute basic calculations utilizing functions and formulas | Level 1 & 3 |
| 6. Import and export data | Level 3 |
| 7. Print and save workbooks | Level 1 |

In this table, learning outcome alignment is viewed through the lens of the BWE excel training; it shows the same correspondences as the table above, but provides more detail on the learning outcomes of each level of the BWE training:

| BWE Excel Training | | |
|---|---|---|
| **Excel Level 1 LO** | **MCA Alignment** | **LO Alignment** |
| Design and organize worksheets | MCA #3 | LO #2 |
| Make editing easy - copy, move, delete, insert or replace | MCA #2 | LO #2 |
| Format Worksheets to meet your needs | MCA #3 | LO #4 |
| Master basic Formulas and Functions | MCA #4 | LO #5 |
| Create charts to show data in visual formats | MCA #7 | LO #3 |
| | | |
| **Excel Level 2 LO** | | |
| Easily work with large worksheets and data sets | MCA #3 | LO#2 |
| Use existing templates and create your custon templates | MCA #5 | LO#2 |
| Protect your workbooks and worksheets with passwords and protect cells | | LO#2 |
| Use and manage multiple worksheets and link cells between worksheets | MCA #6 | LO#4 |
| Create, edit and remove hyperlinks | | LO#4 |
| | | |
| **Excel Level 3 LO** | | |
| Create a PivotTable and a PivotChart to filter how data is displayed | MCA#3 | |
| Create, change and run a macro | AOP 2360 | |
| Use data analysis tools | MCA #9 | LO#3 |
| Create advanced formulas with IF Functions | MCA #9 | LO#5 |
| | | |
| MCA: Major Content Area | | |
| LO: Learning Outcomes | | |
| AOP: Administrative Office Professional | | |
| BWE: Business Workforce Education | | |

Through this crosswalking analysis, college faculty determined the following correspondences, with the potential of adding content to BWE's Excel training to ensure sufficient alignment:

1. BWE Excel Level 1 equates to 1-credit AOP Excel
2. BWE Excel Level 2 equates to 2-credit AOP Excel
3. BWE Excel Level 3 equates to 3-credit AOP Excel

### Digital Badges

Digital badges are a form of portable training credential than can be recognized by employers. The RCTC Marketing department created icons for three digital badges (level 1, level 2, and level 3 super badge). These badge icons were submitted, along with other course information, to WSU-ACE and the Credly/Acclaim platform, which facilitates a digital badging management system for students.

**Pilot Trainings**
The *All Learning Counts* grant was used to host a non-credit, fully-online pilot training in collaboration with BWE. The college's RCTCLearn was used as the learning platform for the three trainings.

The training was offered to all AOP and HCOP (Healthcare Office Professional) advisory committee members, resulting in a cohort of 36 participants. Each trainee was asked to complete the one module of their choosing, take an assessment using the Cengage Learning SAM Challenge online assessment platform, and claim their digital badge.

**Credit for Prior Learning the Challenge of Partial Credit**
Awarding credit for prior learning has been a challenge in cases of partial credit (less than three credits), i.e., when only a level 1 or 2 badge is earned. Existing college policy and procedure do not offer a clear path to awarding partial credit. College faculty explored several options for awarding partial credit via CPL:

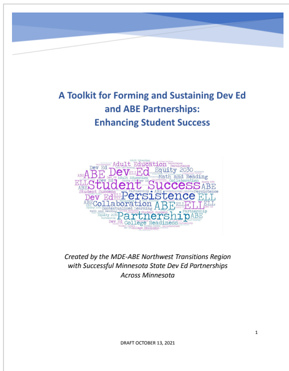
- **Variable Credit**
    - Allows students to register and pay for credit-bearing course for only the credits they need to complete. All registrants participate in the same course but work on and receive credit for the content they need to complete.
    - **Example:** A student earns a Level 1 Excel Digital Badge and enrolls in the AOP program
        - Student sends digital badge transcript to faculty or advisor
        - Faculty or advisor approves student to register in 2-credit AOP 1360 course and only pays for 2 credits
        - Faculty awards points for modules aligned to the Excel Level 1 training. Student is only required to complete modules aligning to the last two credits of the course.
        - Transcript shows full three credit course with a grade.
    - Resistance to the Variable Credit approach stems from the processes regarding faculty pay, course scheduling, and registration, which are extensive.

- **Course Substitution**
    - In this approach, the digital badge would be accepted as an elective transfer to the program.
    - Student would then use additional CPL options to earn the additional credit.
    - Then, faculty would approve the course substitution as an elective and use CPL to arrive at full course credit.
    - However, this option was not acceptable due to the transfer policy that external and internal assessments cannot be combined for a full course transfer

- **Tuition or CPL Fee Waiver** (for one or two credits for digital badge)
    - In this approach, faculty would review the digital badge information and determine the number of credits that could be awarded.
    - The, the student would register for the full course and be awarded a tuition waiver for number of credits already awarded.
        - The student then completes only the portion of courses not covered by the digital badge

      **Or**
    - Student requests to use a CPL Portfolio.
    - Faculty would then request a CPL fee waiver for credits awarded via the digital badge.
        - Student would only pay for and be assessed for content not included in the digital badge assessment.
    - However, this option was not found to be acceptable due to transfer policy on internal and external assessments.

# Additional Curriculum Alignment / Course Design Resources

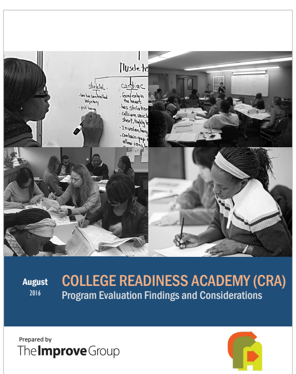



### A Toolkit for Forming and Sustaining Dev Ed and ABE Partnerships: Enhancing Student Success

https://atlasabe.org/dev-ed-abe-toolkit/

This Toolkit is a valuable resource to help train and support Minnesota State campuses and Adult Education programs in forming and sustaining a Developmental Education/Adult Basic Education (Dev Ed/ABE) partnership. The partnership model utilizes national and statewide best practices in collaborative teaching models to improve student outcomes for all students enrolled in development education courses.

This toolkit has been developed specifically for practitioners within the Minnesota State system and Minnesota Adult Basic Education (ABE). However, the practices and information contained in this Toolkit should assist anyone regardless of their campus or Adult Education program location.




### College Readiness Academy (CRA): Program Evaluation Findings and Considerations

https://iimn.org/programs/education/college-readiness-academy/

Launched in January 2015, CRA offers free-of-charge college preparatory classes and wrap-around navigation (advising) services for three partner sites in St. Paul, Minnesota. This qualitative evaluation, based on program data and interviews with staff and students, illustrates the inner-workings of an adult career pathway program. It shows that the program appears to improve students' postsecondary entry, retention, and completion rates by ensuring that they are academically prepared, are familiar with the college system, and have the personal supports to manage college life.

*College Readiness Academy (CRA): Program Evaluation Findings and Considerations.* The Improve Group. (August 2016). St. Paul, MN

# Assessment, Placement, and Credit for Prior Learning

Placement is often a challenge for adult learners. Adult learners have often been out of formalized learning for extended time and may find high stakes testing intimidating. Adult learners may also lack recent practice with math or writing depending upon their current occupations. These factors often lead to adult learners being placed disproportionately into developmental education classes which extend the time to an award in addition to instilling a feeling that they are not ready for college coursework. Developing adult learner placement policies that incorporate adult learners' experiences and knowledge while placing them in the most appropriate courses is critical to helping adult learners succeed in post-secondary education.

*Note: Minnesota State Colleges do not use placement for college acceptance. Placement determines which courses are open to prospective and current students.*

Current practices in the Minnesota State system are established as Multiple Measures Course Placement based on two measures or just the ACCUPLACER ™ if other measures are not available. High School Grade Point Average (HS GPA) and standardized tests including the ACT, SAT, MCAs, and ACCUPLACER ™. The full placement policy is available on the Minnesota State web site.[37]

Multiple Measures for course placement has gained attention and adoption over the last several years to address concerns over standardized testing not providing adequate information for successful placement of students. The Center for the Analysis of Postsecondary Readiness (CAPR) provides the following explanation:[38]

[37] https://www.minnstate.edu/board/procedure/303p1.html
[38] https://postsecondaryreadiness.org/modernizing-college-course-placement-multiple-measures/

*Colleges have traditionally placed students into developmental courses based on their performance on standardized tests. But research shows these placement tests are poor predictors of students' success in college-level classes, and as many as one-in-three test takers is placed incorrectly. Most of the misplaced students are assigned to developmental courses that are below their ability and whose credits do not count toward a degree. As a result, these students encounter an unnecessary hurdle on their path to graduation and their progress is potentially blocked altogether.*

*Meanwhile, studies have found that alternative measures such as high school GPA are significantly better predictors of which students will succeed in college-level courses. Combining high school GPA with other measures including state graduation tests, writing assessments, and noncognitive assessments yields more predictive power, according to the studies. This approach, often called multiple measures placement, is gaining traction at colleges across the country, and more than half of community colleges use measures other than standardized tests to assess academic readiness.*

CAPR also highlights studies related to one that was conducted at four Minnesota community colleges.[39]

Multiple Measures continues to present challenges for adult learners in Minnesota as the measures are typical of recent high school graduates. Adult will not have a recent GPA or they may have undergone significant changes that make their GPA a poor representation of their current ability to succeed in college-level courses. Additionally, those new to the U.S. may have trouble accessing high school or previous college transcripts. Guided Self Placement or GSP is a relatively new placement strategy that engages students, with advising, in the placement process and provides flexibility to include input from ABE and workforce training instructors, work-readiness based examinations learners may have already taken, sample questions from local course exams and more. Minnesota began allowing the use of GSP as a placement strategy for those without other measures during the pandemic, when remote ACCUPLACER™ testing proved difficult and in-person felt unsafe for prospective students. The strategy, along with allowing placement with HS GPA only, proved popular.

Minnesota began a pilot project in 2021 to that has supported most colleges and universities participating in a pilot through the 2022 – 2023 academic year that allows for institutions to use HS GPA alone or Guided Self-Placement (GSP).

The Minnesota State pilot that emerged from the interim guidance during Covid-19 when it was not possible to have large numbers of students taking the ACCUPLACER™ is defined by the following from Ron Anderson, Senior Vice Chancellor for Academic and Student Affairs:

MEMORANDUM
Date: May 17, 2021
To: Presidents
From: Ron Anderson, Senior Vice Chancellor for Academic and Student Affairs
Subject: Assessment for Course Placement

Due to the COVID-19 pandemic and the implementation of stay-at-home orders in March 2020, campus closed their physical facilities and students were no longer able to access placement testing centers. At that time, the only available option for completing course placement assessment was via paid online proctoring. In response to these barriers, ASA issued guidance on course placement assessment that provided for additional methods to place students into college-level courses. These additional methods included the use of stand-alone GPA, and the use of guided self-placement. Since that time, campuses have been able to resume on-site testing, and no-cost online proctoring has become available. As a result, the initial guidance was scheduled to sunset September 2021.

[39] https://postsecondaryreadiness.org/lessons-learned-multiple-measures-assessment/

Over the past few months, however, concerns have been raised about inequities resulting from the use of standardized placement tests and presidents expressed the desire to continue the assessment for course placement pandemic guidance. In response to these concerns and after extensive discussion and consultation with the Chancellor, we are extending the current guidance for two additional years (through September 2023), as a systemwide pilot project, under System Procedure 1A.1.2: Pilot Programs. This extension will provide additional time to collect data on the impact of different placement approaches on student success including first college-level course completion, subsequent retention, and early program completion. This data will be used to inform decision-making on possible revisions to Board Policy 3.3: Assessment for Course Placement and to System Procedure 3.3.1: Assessment for Course Placement in FY23.

What this means for campuses

1. Placement Method Alternatives

   a. Campuses are still expected to fully implement the multiple measures course placement process by the end of fall semester, 2021. This extends traditional placement based on standardized test score(s) to include high school GPA as a mediating factor for test scores falling within a specified band. Students with standardized test scores and high school GPAs should be placed using this method.

   b. High school GPA may be used as a standalone measure for students without standardized test scores.

   c. Guided self-placement may be used for students without standardized test scores or a high school GPA.

2. Identification of Placement Method

   a. Campuses must identify which of the above three methods was used to place students into courses within the areas of reading, writing, and mathematics.

   b. A common approach for coding this information will be developed by Academic and Student Affairs, in consultation with campuses.

   c. Once developed, each campus will be trained on the coding scheme and how to implement it.

Informed self-placement (Guided Self-Placement) has been defined by the system in the following way:

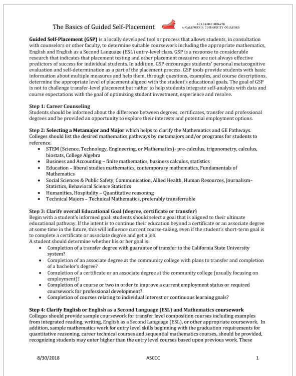
Informed Self-Placement

a. Colleges and universities may allow students who are unable to take the ACCUPLACER and who are without a reportable or valid cumulative high school GPA to register for courses up to and including the college-level gateway course within the disciplines of reading, writing, and mathematics through a locally developed informed self-placement model.

b. Colleges and universities may accept scores from alternative assessments for learners without HS GPA, including but not limited to the following:
   i. The Test of Adult Basic Education (TABE)
   ii. General Education Development (GED)
   iii. Comprehensive Adult Student Assessment System (CASAS)

c. To the greatest extent possible, students who qualify for informed self-placement should meet with an advisor prior to registration as outlined below.

Guided Self-Placement is an important tool for placement of adult learners. Students coming out of K-12 recently likely have a recent GPA and some standardized testing results—which allows multiple measures to work effectively as they have more than one measure and it is recent. However, adult learners often do not have recent High School GPAs or standardized test scores for placement.  Adult learners are also less likely to be accustomed to standardized testing and may be out of practice especially regarding mathematics.  Guided Self-Placement allows adult learners to offer alternative measures, recommendations from trusted partners, or to be introduced to course content to determine their familiarity with it to allow them to make an informed choice. Most importantly, GSP puts the ultimate decision with the student and requires trust of the student's judgment as to how best to be successful while still offering them information to make that decision rationally.  This is especially critical for adult learners who are likely to have greater life experiences and reasonably expect a more collaborative advising process.



## The Basics of Guided Self-Placement

https://asccc.org/sites/default/files/The%20Basics%20of%20Guided%20Self_8_30_2018final.pdf

The Academic Senate for California Community Colleges offers this strong primer on the basics of guided self-placement.

Placement is a critical tool in success for adult learners as placement in developmental education courses is often a barrier to students who then must take additional coursework that result in a longer pathway to a degree and more students not completing a degree. Initial findings from the Fall 2020 semester indicate GSP is no worse than other placement tools overall and seem to demonstrate improvement over other methods for racial and ethnic subgroups that are non-white.

In cases where students are on the bubble between developmental and college level coursework, additional supports can be provided to enable student success including organized tutoring, Peer-Led Team Learning (PLTL), academic pathways, and co-requisite courses that provide additional academic support.[40]

Below are four examples of placement systems that are commonly used. The first is the current Minnesota State practice. Below that are three diagrams that are more general but describe alternative placement pathways.

For the set of three general diagrams, the first of those is like what Minnesota State utilized prior to the introduction of MMCP. Students might qualify for an exemption such as an AP or IB test in a specific subject area or previous college work in the relevant area, but all other students took the ACCUPLACER™. Nationally most colleges and universities placing students used a similar process unless they had a locally developed tool as an alternative.

The second general diagram is like what is occurring under the current pilot for HS GPA and GSP. Students present their GPA and if it qualifies for college level course work, they are enrolled in college level work. If their GPA does not qualify, they may then take the ACCUPLACER™ to qualify for college level courses. GSP may be substituted for HS GPA. Minnesota State does not utilize non-cognitive assessments as part of that process, though they may be utilized as a part of GSP.

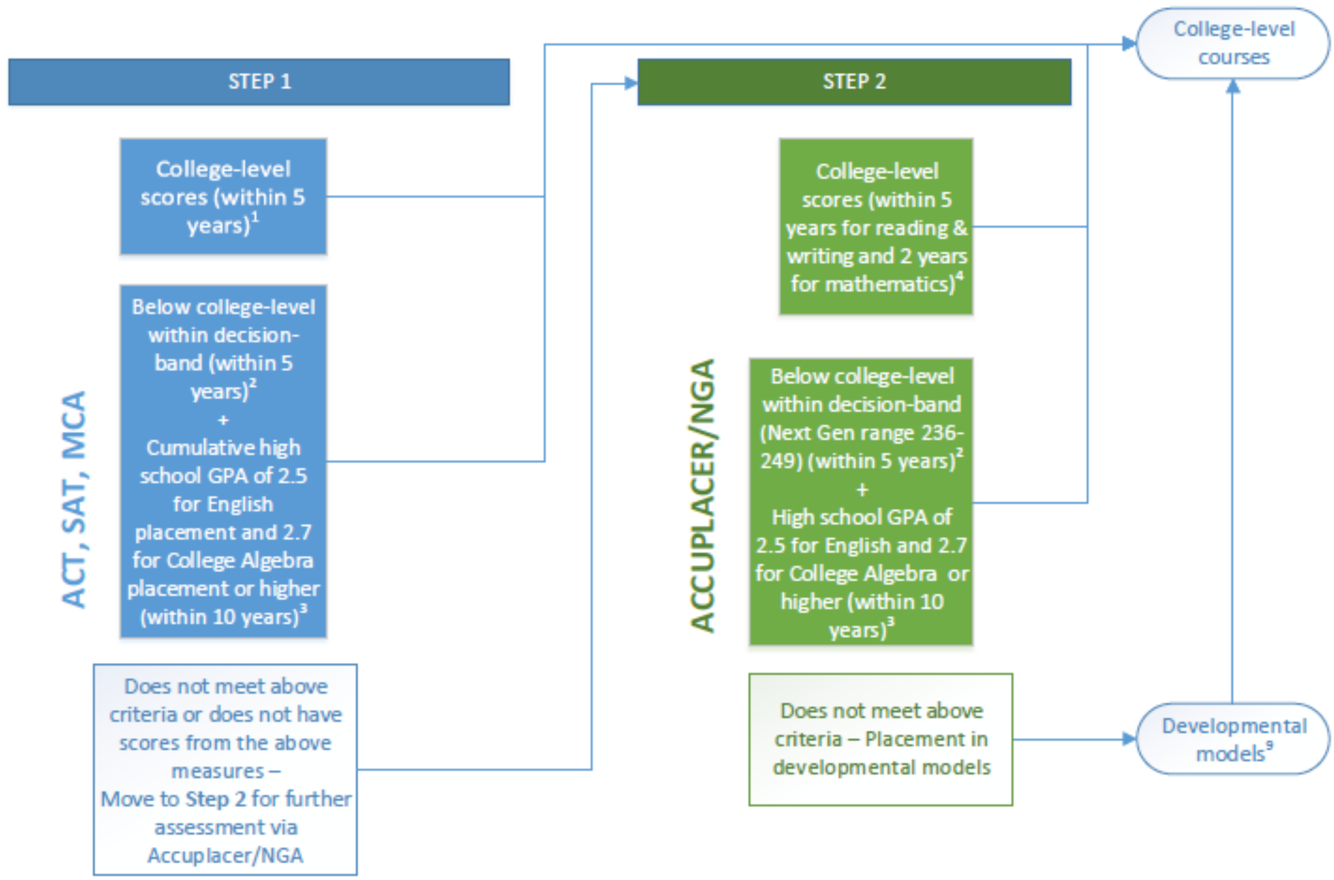
Finally, the third diagram is most like Minnesota State policy under MMCP with some changes in the decision process. Directly below is the Minnesota State Multiple Measures Course Placement Program (MMCP). Students who enroll were required to report their High School GPA and provide scores from several standardized tests including Minnesota Comprehensive Assessments (MCAs), ACT, and SAT and then ACCUPLACER™ if it the others are not available. In Step 1 the student's test scores from ACT, SAT, or MCA are evaluated alone and a recommendation of college level is given to the student if the score is high enough. If the test scores are in a band of scores, but below qualifying automatically for college level,

[40] https://ccrc.tc.columbia.edu/research/developmental-education.html

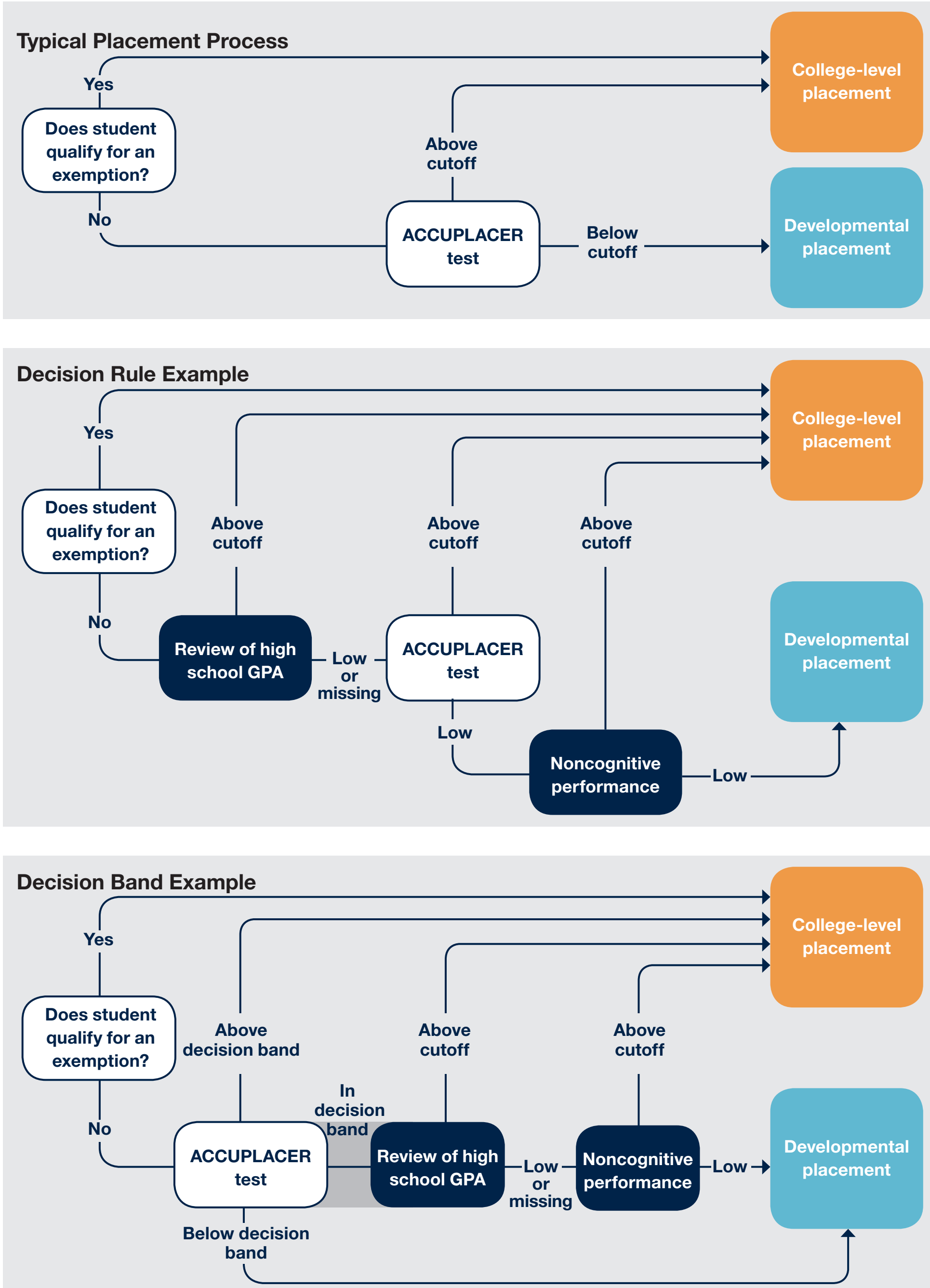
the HS GPA is added to determine if the student is ready for college level coursework. If a test within 5 years or HS GPA within 10 years are not available, then students are moved to Step 2 and the same evaluation is done for ACCUPLACER™ which has the validity limited to two years from date of testing.

### Multiple Measures Course Placement Program – Phase 1

*Implemented by Fall 2021 for Spring 2022 Enrollees*



## Examples of Placement Systems




*From "Toward Better College Course Placement: A Guide to Launching a Multiple Measures Assessment System." Community College Research Center (CCRC). Teachers College, Columbia University. July 2018. Available at: https://www.mdrc.org/sites/default/files/2018_Multiple_Measures_Guide.pdf*

The justification for the pilot which allows students to rely on High School GPA or GSP, is that the High School GPA is often the most predictive measure of how students will perform.[41]

A fourth type of placement system, where a Memorandum of Understanding (MOU) is used to define a specific arrangement, such as college-level placement upon completing an ABE course and a specific placement test, is illustrated with an example on the following page.

[41] https://postsecondaryreadiness.org/modernizing-college-course-placement-multiple-measures/

## Placement Agreement Example: ABE to Saint Paul College

These placement agreements, developed by Saint Paul College and local Adult Basic Education Providers, clarify the proficiencies needed to achieve placement into college level reading and writing courses. The agreements are the product of hours of conversation and buy-in between college Reading and English faculty; ABE instructors and navigators at the International Institute of Minnesota, Hubbs Center, and Harmony Adult Education; Saint Paul College's Title III team; and the college's Dean of Career and Technical Education, who shepherded the process. Saint Paul College compensated faculty for their time using grant funds.

This first agreement shows criteria for placement from ABE/ESL into Dev Ed Level I.

### Adult Basic Education Partnership: Articulated Placement Agreement Checklist

Saint Paul College will place students in Reading 1 (READ 0721) and/or Writing 1 (ENGL 0921) if the following conditions are met:

1. The student scores between 0 and 37 on the Accuplacer Reading test, or,
2. The student scores between 200 and 224 on the NGA Reading test, **AND**
3. The student is deemed to have mastered the following checklist of competencies by attending either HUBBS, Harmony, or College Readiness Academy:

**A. SENTENCE FLUENCY**

- ☐ Identify, write, and say (produce) grammatically correct (complete) sentences
- ☐ Writes a short (five-to-seven sentence) paragraph in class with 80% grammatical accuracy and stays on topic
- ☐ Self-identify and correct basic errors in one's own writing

**B. VOCABULARY**

- ☐ Recall explicitly taught academic words at fifth-to-seventh grade level
- ☐ Determine word meaning from context, word parts and word family

**C. COMPUTER SKILLS**

- ☐ Create, name, and save a file
- ☐ Attach a file to an e-mail
- ☐ Write and respond via e-mail appropriately
- ☐ Conduct basic image and information searches

**D. READING COMPREHENSION**

- ☐ Summarize main idea and key points from a one-page article (at a fifth-to-seventh grade level)
- ☐ Make connections between the text and other experiences and infer beyond what is stated (at a fifth-to-seventh grade level)
- ☐ Read and process a 20-to-50 page text

**E. TEXT STRUCTURE AND GENRE**

- ☐ Identify text types (fiction, non-fiction, and opinion)
- ☐ Identify common organizational structures
- ☐ Use text features including those in a textbook chapter

**F. STUDENT SKILLS**

- ☐ Follow spoken and written directions
- ☐ Complete homework on time
- ☐ Attend class regularly and on time
- ☐ Shows awareness of needs and asks for support

**G. SPEAKING**

- ☐ Participate in small and large group discussions
- ☐ Clearly express ideas orally
- ☐ Ask clarifying questions

Student: ______________________________

Instructor: ______________________________

Signature: ______________________________

Institution: ______________________________

Phone Number: ______________________________

SAINT PAUL COLLEGE
A Community & Technical College

## Placement Agreement Example: ABE-to-Saint Paul College (continued)

This second agreement reflects criteria for placement from the ABE College Readiness Academy into Dev Ed Level II.

# Adult Basic Education Partnership: Articulated Placement Agreement Checklist

Saint Paul College will place students in Reading 2 (READ 0722) and/or Writing 2 (ENGL 0922) if the following conditions are met:

1. The student scores between 38 and 59 on the Accuplacer Reading test, or,
2. The student scores between 225 and 239 on the NGA Reading test, or,
3. ABE placement into Level 1 **AND**
4. The student is deemed to have mastered the following checklist of competencies by attending either HUBBS, Harmony, or College Readiness Academy:

**A. WRITING FLUENCY**

- ☐ Write, revise and edit paragraphs for thorough development and effective organization
- ☐ Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience
- ☐ Write an objective summary of a two-to-five-page text in a paragraph with a topic sentence; multiple claims, evidence and rational sentences (support sentences); and concluding sentence
- ☐ Write narratives in which they recount two or more appropriately sequenced events, include details regarding what happened, use temporal words to signal event order, and provide closure
- ☐ Accurately compose simple, compound, complex and compound/complex sentence structures with correct interior and end punctuation
- ☐ Revise and edit sentences to correct sentence-level errors such as sentence fragments and run-on errors
- ☐ Demonstrate subject/verbs, pronoun/antecedent and verb tense agreement
- ☐ Use transitional words, phrases, and clauses (because, therefore, since, for example) to connect ideas in a paragraph

**B. VOCABULARY**

- ☐ Demonstrate 70% accuracy of vocabulary appropriate for Level 1 Writing
- ☐ Apply vocabulary-building strategies, such as word parts analysis and guessing in context in reading and writing

**C. READING COMPREHENSION**

- ☐ Recall with at least 70% accuracy on a closed-book assessment based on a full length chapter appropriate for a lexile range of 925-1,100 for both fiction and nonfiction
- ☐ Read and be able to retell key points (both written and orally) from fiction and nonfiction passages of both articles (two pages) and longer texts (10-50+ pages)
- ☐ Read and process a novel (100+ pages)
- ☐ Determine central idea of text and major supporting details
- ☐ Apply strategies to annotate a text
- ☐ Engage in small and large group discussion based on a text

Student: ______________________________

Instructor: ______________________________

Signature: ______________________________

Institution: ______________________________

Phone Number: ______________________________

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A Community & Technical College

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## IIMN College Readiness Academy Checklist

*This survey/checklist was developed by instructors at International Institute of Minnesota for the College-Ready Academy course funded by a grant from the Lumina Foundation in 2019 for the Minnesota State Colleges and Universities All Learning Counts Project. The checklist details criteria for assessing successful completion of the ABE college readiness program and subsequent placement into the College at college-level in reading and writing, per the Partnership Agreement on page 31.*

*This survey/checklist can be used by any community-based organization to help prospective college students self-assess their readiness for college-level work on 32 college-level skills.*

**Scale**

For each of the college-level skill below, assess using this four-point scale, then sum them to get an overall score. The closer the overall score is to 128, the more confident a student is in their ability to successfully pursue college-level work.

1. **Not confident**: *I cannot do this without a navigator or teacher helping me.*
2. **Somewhat confident**: *I am working on this, but I am not very comfortable doing this by myself yet.*
3. **Mostly confident**: *Most of the time, I can do this without a navigator or teacher helping me.*
4. **Very confident**: *I know I can do this on my own.*

**I. English skills for college success**

___ I can write simple, compound and complex sentences without grammar errors.
___ I can edit, revise and format my sentences, paragraphs and essays.
___ I can write a four-paragraph synthesis essay with direct quotes and citations.
___ I can follow the writing process.
___ I can read a novel from beginning to end.
___ I can read a college-level text and remember important details and main ideas.
___ I can write a summary paragraph of a college-level text, which contains a clear topic sentence, support sentences, evidence, and concluding sentence.
___ I can speak about a new topic for 30 seconds to 2 minutes.

**II. Study skills**

___ I can annotate a textbook chapter, noting all the main ideas and vocabulary.
___ I use English regularly outside of class.
___ I am confident that I will be able to manage my time and responsibilities in college.
___ I know how to set up my study time and space.
___ When I need help with an assignment, I know where and how to find support and help.

**III. Classroom engagement**

___ I understand the instructor's instructions in class.
___ I actively participate in pair and group discussions.
___ I can be respectful towards other people who might not have the same opinions as me.
___ I am able to collaborate with classmates on projects: presentations, group discussions, and other kinds of group work.

**IV. Computer skills**

___ I can use and learn how to use different computer programs for my classes.

___ I'm comfortable typing a polite email and typing my written assignments.
___ I can manage all of my accounts and passwords.
___ I can navigate websites even if they are new to me.
___ If I need to conduct research or find information, I know how to conduct a search (using Google, etc.)

**V. Financial planning**

___ I have a plan to balance my college classes with my work schedule and time to care for family members.
___ My family and I have planned and budgeted for college.
___ I have access to my taxes and other documents necessary to complete financial aid applications.
___ I know what types of financial aid I am eligible for (FAFSA, scholarships, loans, and grants), and I have concrete plans to apply for them.
___ I know the difference between loans, scholarships and grants, and I understand how each will impact my financial situation (For example, failure to repay loans will impact my credit score).

**VI. Persistence and support**

___ I know how to ask for help and I feel comfortable doing so.
___ I know where to ask for help. If I don't know the answer, I can find someone who does.
___ I am able to keep going, even when things get difficult (work load, personal issues, etc.).
___ I am able to set short-term, medium, and long-term goals, and work towards them, keeping the big picture in mind.
___ In general, I feel emotionally and mentally healthy, and capable of taking on the added stressors of college.

*Total score =* ____________

# Credit for Prior Learning: An Overview

Credit for Prior Learning (CPL) is the evaluation and assessment of learning gained outside a traditional academic environment for college credit. Educators assess student knowledge, skills, and abilities acquired through work, professional training, military education and occupations, and other learning experiences. CPL includes a variety of assessment methods, including standardized examination, challenge exams, individual assessment, and evaluation of non-college education and training.

As the demand for adults who have earned a higher education degree continues to increase, many institutions are establishing or expanding CPL offerings as a tool to accelerate and increase degree completion. And studies show that students who earn CPL credit are roughly twice as likely to earn a postsecondary degree[42] and have significantly higher retention, GPA, and credit accumulation.[43]

## Creating CPL Opportunities on Campus

There is a wealth of resources (see below) that go into great depth on implementing CPL, and we encourage readers explore them. Very briefly, building out CPL opportunities at an institution involves:

- **Forming an advisory group** to craft CPL policies and procedures
- **Gathering examples** of current and former CPL practices at the institution
- **Scanning the environment** for CPL practices and policies at peer institutions
- **Identifying and developing faculty leaders.** Faculty are central to the promotion and execution of CPL at their institution. Roles they play include:
    - **Champion:** Faculty promote CPL to both students and their peers. They refer adult learners who are candidates for CPL to the campus CPL Coordinator. They also make the case for CPL at their institution, educating faculty and staff about the benefits of CPL to students, employers, and the institution itself. (See page 17 for tips and info on making the case.)
    - **Advisor:** Faculty advise learners on CPL eligibility, processes and assessments.
    - **Designer/Evaluator:** Faculty design and use CPL assessment rubrics to measure learner competencies against course or program competencies. They determine a learner's CPL grade and complete evaluation forms so CPL credit can be transcripted by their institution.
- **Sharing CPL information** with faculty and students - and creating formal channels to do so.
- **Formalizing CPL policies and processes**, including the creation of a **CPL Coordinator** position on campus.
- **Supporting CPL activities and professional development opportunities** for faculty and staff around CPL development, including venues for creating processes, assessments, and crosswalks.

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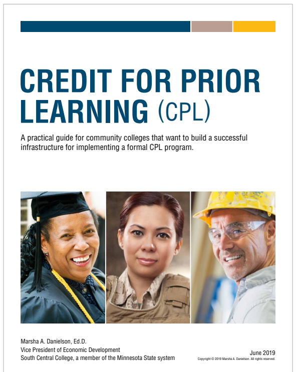
[42] Klein-Collins, R. (2010). Fueling the race to postsecondary success: A 48-institution study of prior learning assessment and adult student outcomes. Chicago, IL: The Council for Adult and Experiential Learning. SEE ALSO Hayward, M. & Williams, M. (2015). Adult Learner Graduation Rates at Four U.S. Community Colleges by Prior Learning Assessment Status and Method. Community College Journal of Research and Practice, 39:1, 44-54.

[43] Schutz, G. and Gibson, J. (2012, Fall). Promoting prior learning assessment policy: discovering evidences for state and institutional decisions. [Presentation.] Southern Association for Institutional Research Annual Conference.

# CPL Resources and Tools




### Credit for Prior Learning: A Practical Guide for Community Colleges

*Dr. Marsha Danielson*
https://southcentral.edu/images/departments/CPL/CPL_Implementation_Guide.pdf

This guide is designed for community college faculty, staff, and administrators who have some familiarity with CPL and want to learn "how to" implementation strategies. It takes the reader from the research and planning stage through marketing and public relations. Throughout the process, it provides guidance about administrative support, faculty, staff, and student engagement, and offers best practices. It also provides a wealth of practical resources, including:

- Faculty Compensation Schedule
- Pricing Models and Fees Summary
- CPL Assessment Grant Proposals Form
- Advisor Training PowerPoint
- Sample CPL Process
- Process/Conceptual Map
- CPL Assessment Request Form
- CPL Assessment Confirmation Agreement Form
- Evaluator Response/Rating Rubric Form

### C-PLAN: Minnesota's Credit for Prior Learning Assessment Network

https://www.minnstate.edu/admissions/cplan.html
C-PLAN is a Minnesota State collaborative that supports colleges and universities in credit for prior learning (CPL) implementation, cultivating a community of practice, sharing best practices, and providing a wealth of technical and practical resources. *See page 110 for more information.*

### The American Council on Education

https://www.acenet.edu/Programs-Services/Pages/Credit-Transcripts/Awarding-Credit-for-Prior-Learning.aspx
The American Council on Education (ACE) provides a number of resources on CPL implementation and best practices. *See page 103 for the ACE CPL Implementation Matrix.*

### The Council for Adult and Experiential Learning (CAEL)

https://www.cael.org/lp/pla
CAEL leads the way in making the case for expanding CPL, and details strategies for doing so. They also have a "We Help You Build It" model that supports individual institutions in building out their own CPL programs and policies.

### PLA Inside Out: An International Journal on the Theory, Research, and Practice in Prior Learning Assessment

www.plaio.org
PLA Inside Out (PLAIO) is the first scholarly online journal entirely devoted to the recognition and assessment of prior experiential learning.

## ACE Credit for Prior Learning Implementation Matrix

*The American Council on Education (ACE) developed this matrix as a tool for colleges to evaluate and advance their work on CPL policy and practice in the areas of faculty engagement and development, student outreach and support, and campus infrastructure. For each area, the matrix identifies essential actions.*

American Council on Education®

# Credit for Prior Learning Implementation Matrix

| INSTITUTIONAL STAGES | NEW/EMERGING STAGE | DEVELOPING STAGE | EFFECTIVE PRACTICE STAGE |
|---|---|---|---|
| | Has general understanding and information on prior learning, with demonstrated institutional interest. | Acknowledges the role of prior learning in postsecondary pathways. Begins to develop standard policies and procedures. | Has broad and deep understanding of credit for prior learning policies and uses that knowledge to integrate, and sustain systematic and accessible CPL practices. |
| **DEFINITIONS AND ACTIVITIES** | | | |
| FACULTY ENGAGEMENT AND DEVELOPMENT | Forms advisory group to craft policy and practice; attends conferences; invites experts to provide overviews. | Creates venues for information- sharing across institutional constituencies; involves faculty groups in developing and vetting policies/practices, such as crosswalks and articulations. | Provides professional opportunities for faculty and staff, including conferences, research, and writing; encourages faculty to include CPL activities in annual reviews, and promotion/tenure evaluations; implements incentives and areas of recognition. |
| STUDENT OUTREACH AND SUPPORT | Directs students to current CPL options through academic advising and program coordination. | Shares information on website and uses other venues to communicate with students, such as orientation and advising. | Informs students of CPL options prior to admission; provides expert advising about prior learning assessment; uses all types of communication tools to share information with students, from outreach with potential students to graduation. |
| INFRASTRUCTURE, POLICIES, AND PROCESSES | Scans the landscape for current and informal institutional CPL practices; seeks policy and practice models among peer institutions. | Expands current policy and practice; puts people and structures into place to manage programs; begins to coordinate CPL-related programs and services. | Selects appropriate CPL tools that fit institutional context and curriculum that recognize diversity of learners and their experiences; promotes active use of CPL in all degree areas, including major requirements and general education; well-managed with established policies and practices. Embeds CPL within other programs, such as competency-based learning. |



Download the matrix at https://www.acenet.edu/Documents/Credit-for-Prior-Learning-Infographic.pdf

## South Central College Credit for Prior Learning Action Plan

*South Central College (SCC) used the ACE Matrix as a basis for creating its own detailed Credit for Prior Learning (CPL) and Prior Learning Assessment (PLA) Action Plan. CPL Leaders at SCC proposed engaging SCC faculty and staff in a series of stages in alignment with the Matrix. This outline serves as a working document for SCC to be revised as progress is made.*

**Stage 1:** Foster institutional interest, ensure compliance with MnSCU policies, understand and promote current options to faculty, staff, and students.

Faculty/Staff Involvement

- Training and Professional Development
  - To enhance discipline-appropriate faculty, administrators and staff awareness of CPL/PLA
  - To increase ability of faculty and staff to carry out CPL/PLA roles and responsibilities
- Form an advisory group including representation from areas including Faculty, Deans, Registrar, Business Office, Advisors, Recruitment, Admissions, Financial Aid, Center of Business & Industry, Transfer Coordinator, Senior Associate to the President, Marketing, and Students if possible
- Attend conferences and workshops to learn more
- Information gathering and sharing about current and future CPL options at SCC
- Develop definitions for Competence, Credit for Prior Learning, Competency-based Education (See Appendix B for state-wide Competency Certification/Credit for Prior Learning (CCCPL) committee definitions)
- Identify primary contact for CPL/PLA at South Central College
  - CC/CPL Workgroup Formation
  - Toolkit for Scale-up
  - Professional Development
  - Capacity Building Resources
    - Institutional Support
    - System Support
  - Policy and Procedure Development

Infrastructure, Policies and Processes

- Review Minnesota State CPL/PLA policies and procedures; identify with advisory group gaps that need addressing in SCC's policy
- Review the recommendations of the state-wide MnSCU task force (CCCPL)

Student Outreach and Support

- Facilitate discussions with faculty and departments to determine what SCC is currently doing informally and formally to award CPL
- Conduct gap analysis to determine development strategies for expanding CPL opportunities
- Update website on current offerings
- Update advisors/recruiters of current CPL offerings to inform students

**Stage 2:** Create ways to share and gather information among faculty, share information with current and prospective students, develop a policy and practice model that will work for South Central College.

Faculty/Staff Involvement

- Review acceptable methods for awarding CPL at SCC (advisory board task) Potential methods include:
  - Standardized exams such as AP, CLEP, DANTES Subject Standardized Test (DSST), Excelsior College Exams, International Baccalaureate (IB) Diploma Programme, Thomas Edison State College Examination Program, and others
  - Third-party evaluation providers such as the American Council on Education's recommendations for military and other education (CREDIT), National College Credit Recommendation Service (NCCRS), and Industry Training and Experience
  - Individualized assessments including portfolios, demonstrations, oral interviews, or a combination of methods
  - Institution-led exams or assessments - Test-outs/Challenge exams
- Establish working groups for each approved method of CPL/PLA
- Determine specific training needs, continue to attend workshops, conferences, etc. surrounding CPL/PLA
- Assess whether CPL/PLA workshops and/or course for credit would be appropriate/feasible for students

Infrastructure, Policies and Processes

- Determine SCC standards for awarding CPL/PLA (advisory board task)

- Develop CPL/PLA credit limits - consistent with SCC Residency and MnSCU CPL policies
    - Determine types of CPL experiences SCC will award credit for
    - Determine minimum exam scores for standardized tests
    - Determine acceptable timeframe requirement for experiential learning (ex. last 5 years)
    - Determine equivalent and non-equivalent course credit
    - Determine guaranteed credit cross walks and develop matrix (pre-approved pathways)
    - Set policy for treatment and acceptance of CPL/PLA from other institutions to SCC
- Develop and refine CPL/PLA policies and procedures in accordance with MnSCU policies and procedures
    - Review and develop assessment fee structure for students seeking CPL
    - Determine policies and procedures surrounding faculty compensation for assessments
    - Determine process for appealing CPL decisions
    - Determine system for coding, documentation, transcription and transfer in accordance with MnSCU system policies (attach faculty assessment summary)
    - Determine how CPL/PLA aligns with graduation requirements
    - Determine financial aid and benefits for veteran implications with CPL
    - Identify and document student/instructor/staff steps and procedures for assessing and awarding CPL
    - Identify and document student and faculty responsibilities surrounding CPL

Student Outreach and Support

- Develop written criteria and process steps on the website
    - Promote credit crosswalk matrix (pre-approved pathway)
- Offer information workshops for students on CPL
- Incorporate identification of potential CPL candidates in advising
- Develop an internal and external marketing plan (BeginAgainTN.org; GoBackMoveAhead; FlexPath; Fast-Track)
    - Recruitment efforts

**Stage 3:** Integrate and sustain systematic and accessible CPL practices.

Faculty/Staff Involvement

- Include CPL/PLA activities in annual reviews, and promotion/unlimited evaluations
- Implement incentives and areas of recognition
- Periodic review of program at departmental level through stakeholder engagement

Infrastructure, Policies and Processes

- Create metric to evaluate impact and success of CPL/PLA programs
    - Student persistence
    - Completion of degrees and certificates
    - Cost model metrics for Return on Investment
- Periodic review of CPL/PLA processes and fees through stakeholder engagement
- Embed CPL/PLA within other programs, such as competency-based learning

Student Outreach and Support

- Inform students of CPL/PLA options prior to admission as well as when they are admitted
- Promote CPL to students and parent (for themselves) at orientation
- Use communication tools to share information with students (social media, website, orientation, etc.)

## For Reference / Further Information

South Central College CPL Policies and Procedures

- https://southcentral.edu/About-CPL/about-credit-for-prior-learning.html
- https://southcentral.edu/About-CPL/general-cpl-procedure.html

Additional Examples of CPL Forms and Processes from South Central College, see:

*Credit for Prior Learning: A Practical Guide for Community Colleges*
https://southcentral.edu/images/departments/CPL/CPL_Implementation_Guide.pdf

# CPL Assessment Example: Business Management Pathway

## About the Business Management Pathway

*The Professional Leadership Pathway is a semester-long training program offered by International Institute of Minnesota (IIMN), combining a three-month paid internship offered by TPI Hospitality and the opportunity for students to earn college credit towards three courses in Minneapolis College's Business Management AS or AAS Program. (See page 79 to learn more about the pathway, including lessons learned and an example crosswalk.)*

*The partnership developed the following CPL assessment options for students completing the IIMN Professional Leadership Training, including the TPI internship. Upon successful completion of the training and internship, students are able to pursue college credit via CPL using the following assessment options, and faculty use the following rubric to determine whether credit is awarded.*

### BUSN1140 Credit for Prior Learning Assessment Options

**Course Description:**
This course is designed to give students an understanding of the functional areas of business. Major emphasis is placed on business ownership, business decision making, management, marketing, finance, budgeting, production, and the relationship between business, government, and labor.

**Course Objectives:**
Students should be able to:

1. Explain the business environment both locally, nationally, and internationally
2. Understand how business are formed and organized
3. Evaluate key skills to managing an enterprise
4. Appreciate the role of labor within an organization
5. Explore the importance of customer relationships
6. Identify key trends and tools in business technology

**Option 1: Portfolio**
Students choosing the Portfolio must supply materials/evidence to evaluate for each of the six Course Objectives listed above. Portfolio evidence can include:

- SWOT Analysis
- Business Plan
- Marketing Plan
- Managerial Experience Performance Appraisals
- Employment Staffing Plans
- Small Business Performance Evaluation Documentation
- Customer Relationship Management Program Assessment
- Business Technology Evaluation

Other documentation can also be submitted that demonstrates the Course Outcomes. This evidence should all be from previous positions, experiences, or similar coursework (aka not created for this assessment).

Include with the Portfolio submission a brief Reflection on your experiences with Business, specifically addressing each of the Course Outcomes. Identify within the Reflection how the specific evidence corresponds to the Course Outcomes and where to find the primary evidence for each Course Outcome.

**Option 2: Comprehensive Project**
Students choosing the Comprehensive Project will complete a paper that addresses the six Course Objectives listed above. The Comprehensive Project should include the following sections in APA style and include outside research (cited in APA style preferred).

- External Analysis (about 2-3 pages)
    - Evaluate the external business environment for a chosen industry, must include a full PESTEL Analysis and based on current (aka within the last 6 months) conditions in the marketplace.
- Customer Demographics (about 1-2 pages)

    - Demographics/Statistics detailing a potential customer base (geographic, demographic; what defines/describes the people in this customer base).
    - Why are you choosing this customer base? Give concrete evidence and a basis for this customer group – including buying power, size, need to be met, etc.
- Business (2-4 pages, must include the following sub-sections) – this can be an existing company that you will be proposing a new product/service for or a new company that you will be writing a "mini-business plan" for.
    - History/Culture/Description of Business/Organization (if new company, what is your history that qualifies you to open this company)
    - Strengths & Weaknesses: Internal capabilities/issues of company – specifically address/analyze each of these (if a new company, detail how you intend to structure and develop each of these):
        - accounting, finance (including financial statement/stock analyses), management, human resources, labor relations, marketing, technology, communication, and other major internal/functional aspects of firm
    - Current responsibility position of company (ethical statements, social responsibility initiatives, and actual practices) (if new, define responsibility – ethics, social responsibility, sustainability philosophies)
    - Current products and competencies (what do they currently do, who are their current customers, what do they do best, etc.) (if new, define what this business will intend to make, who their customers will be, and what will set them apart from the competition)
    - Opportunities & Threats: External areas of growth/risk – specifically address/analyze each of these:
        - competition, economy, culture, technology, ethics/law, environment, and other external areas which will impact the ability of this company to solve the issue
- Proposal
    - Propose a solution (product, service, etc.) for this business to address a specific customer need and at least one specific issue in the external environment (aka bring together the External Analysis, the Customer Demographics, and Business sections)
    - Support your proposal with specific details and be sure to show comprehensive impact on the business/organization's internal structure: **address the financial, marketing, management, human resources, technology, and other internal resources needed to implement this proposal**.
    - Address how this proposal supports Responsible Management – specifically ethics, social responsibility, and sustainability.
    - Be sure that this proposal is realistic and supported – be specific with evidence.

### Assessment Rubric

| Objective | Met (Objective met at an 85% level or greater) | Not Met (Objective does not meet at an 85% level) |
|---|---|---|
| 1. Explain the business environment both locally, nationally, and internationally | Realistic and relevant external analysis, shows ability to explain the major forces in the business environment | Unrealistic or irrelevant external analysis, does not explain at least 85% of the major forces in the business environment |
| 2. Understand how business are formed and organized | Demonstrates major business formation types and displays understanding of how businesses are organized (major functions, structures, etc.) | Does not clearly demonstrate formation types or business organizational principles at an 85% level |
| 3. Evaluate key skills to managing an enterprise | Management functions described and evaluated, shows clear understanding of issues in managing others, demonstrates managerial skills | Is not able to describe management functions or demonstrate managerial skills, does not show an understanding of issues in managing others at an 85% level |
| 4. Appreciate the role of labor within an organization | Understands what labor is and how to manage others, demonstrates responsible management (ethics, social responsibility, sustainability) within scope of relations with employees/labor | Does not demonstrate understanding of labor or management, cannot describe responsible management practices at an 85% level |
| 5. Explore the importance of customer relationships | Clearly communicates importance of customer relationships, understands basic marketing principles | Does not communicate importance of customer relationships or have the basics of marketing demonstrated at an 85% level |
| 6. Identify key trends and tools in business technology | Describes current trends, issues, and tools related to business technology | Does not demonstrate trends, issues, or tools related to business technology at an 85% level |

## CPL Documentation Template for Campuses and Partners

*This is a template that campuses, CBOs, ABE, and other training providers can use to document their CPL process and facilitate the transcripting of CPL credits as they are attained, so that they are on-record. It is based on a template provided by Metropolitan State University and used with a number of the University's CBO partners. To use, replace the instructions (in italic) with the content described.*

# *(Community-Based Organization Name)* Documentation

*At the start of the document, provide a brief description of the partner organization and what the organization's training program includes. For example:*

- *Links to campus and or training provider website(s) that provide detail*
- *Date the agreement began – duration of the agreement, if appropriate*
- *Name of the training course provided by the partner organization*
- *Number of college credits granted upon completion*
- *Name the specific course or goal area matched as campus equivalencies to the training*

### How to earn your Campus Credits

*Here, list the specific steps that a student would need to complete to have the credits transcripted onto their campus transcript.*

1. Participate in and complete *the course or courses in the CBO agreement.*
   *List out specific details such as – needs to successfully complete 75% of the course or 6 of 8 sections…*
2. Students will receive a Certificate of Completion from the organization.
3. Apply to campus
   *Include a specifically designed Visiting Student Form – or potentially a generic Visiting Student Form that is utilized by the campus for multiple CBO agreements.*
4. Submit application and Certificate of Completion to Admission Office or Transfer Office
   *(whatever is set up at the campus for processing flow)*
5. *Campus will award credit by entering information on the Education Tab of the ST1001UG screen using the CBO as the "Institution Name". The campus will provide information to students about their campus transcript and how to request a copy. Could also add clarification of the transcription being of no cost to the student here.*
6. *Disclaimers:*
   - *the credit is only for the partnership agreement and that to apply to a degree program, the student would need to be fully admitted to the campus in a degree program that will utilize the specific credits rather than in visiting student status.*
   - *clarify that the credit would not be counted toward residency credit requirements at the campus*
   - *Express that the credit may not transfer to another higher education institution. Transfer acceptance decisions are up to the receiving institution.*
7. *Use the concluding paragraph to tie the specific earned credit to a campus program of study or describe how it may be best utilized in a program of study at the campus to encourage the student to continue taking courses to be able to utilize the credits.*

### Process Documentation

*Here, include specific details, including screenshots and instructions, to document processes such as:*

- *Creating the student's record in ISRS from the visiting student application*
- *Encoding the course in uAchieve, and the credit award on the student's ISRS record*

*To be specific, include screenshots that clearly demonstrate:*

- *Students being admitted as a code 31 – "Visiting Student"*

- *The specific CBO Cohort Code to code the record with for tracking*
- *How the information should be entered on the Education Tab*
- *What a student's transcript will look like after the credit is coded*
- *Specifics on how to enter information in uAchieve so if/when the student becomes a degree-seeking student, the course will display properly on the student's degree audit report and the student planner.*
- *Images of what the Certificates of Completion look like for that agreement*
- *An Image of what the CBO-specific Visiting Student Application looks like.*
    - *The mini-application form includes:*
        - *A note for the student to submit the Certificate of Completion at the same time as the Visiting Student Application.*
        - *Information for where to send documents.*
        - *the disclaimer that private data is being collected and they are not legally required to provide it.*
        - *Contact information for accessibility resources for an alternative format form.*

# C-PLAN: The Minnesota Credit for Prior Learning Assessment Network

The Credit for Prior Learning Assessment Network (C-PLAN) is a Minnesota State collaborative that supports colleges and universities in credit for prior learning (CPL) implementation. C-PLAN's campus partners contribute to the successful implementation of credit for prior learning at Minnesota State by developing and sharing best practices.

C-PLAN welcomes all Minnesota State colleges and universities to learn more about contributing to CPL implementation at Minnesota State and participating in the Network's CPL activities.[44]

https://www.minnstate.edu/admissions/cplan.html

C-PLAN initiatives and resources include:

- **CPL Academy:** A free, online, interactive course offered throughout the year, the CPL Academy offers feedback by expert CPL faculty, and benefits cross-functional teams with a wide array of information and resources on CPL assessment and implementation. An advisory group is facilitating the expansion of the Academy to include content and communities of practice for CPL stakeholders.

- **Certificates to Credits (C-to-C):** The C-to-C Program, developed by a faculty team across programs and institutions, provides guides, rubrics, and checklists to institutions for evaluating industry- and community-based certificates and training. C-to-C has also developed resources for external partners, including checklists, self-assessments, and a toolkit for CBO partners. A workgroup meets bi-monthly to identify opportunities for expanding C-to-C crosswalks.

- **CPL Web Platform:** C-PLAN is facilitating the development of a CPL web-based platform to assist potential and current students in navigating CPL options at Minnesota State. The platform will also host CPL resource guides for faculty, advisors and other campus stakeholders, and external partners and help campuses streamline the CPL process. (See page 111 for more information.)

- **Professional Development.** Knowledge-sharing and technical assistance facilitated by:
  - Bi-monthly Ask C-PLAN webinars that offer campuses CPL information and opportunities to share best practices.
  - C-PLAN facilitated, faculty-led webinars that highlight examples of CPL assessments.
  - C-PLAN workshops and technical assistance for individual campuses upon request.

Through an advisory council and workgroups in subjects such as policy, procedure, coding, and transcription, C-PLAN and contributing campuses develop and share models and guidelines for CPL assessments, student advising and navigation, data analysis, and other areas.

[44] To learn more, fill out the brief contributor interest form at https://mnscu.co1.qualtrics.com/jfe/form/SV_1LzfwoSWYckee6a

# MinnesotaCPL Website

MinnesotaCPL (www.MinnesotaCPL.com) is a single portal for South Central College students, faculty, evaluators, CPL coordinators, and deans to manage the whole Credit for Prior Learning (CPL) process, from request to assessment to decision. The platform was developed by and for South Central College, but plans are in the works to launch the website statewide in the near future.

**For Adult Students**

- **Guided:** Gain valuable insight for prior learning experience through a wizard-style interface
- **Collaborative:** Connect with faculty evaluators and CPL coordinators in a centralized online location
- **Transparent:** Track CPL request progress and receive alerts when further action is needed

**For CPL Coordinators and Academic Deans**

- **Balanced:** Set the process in motion, managing requests via a queue that generates notifications
- **Interactive:** Track all conversations from request through decision in a central, collaborative location
- **Managed:** Relay tasks and 'action required' alerts to students, faculty, CPL coordinators, and deans

**For Faculty Evaluators**

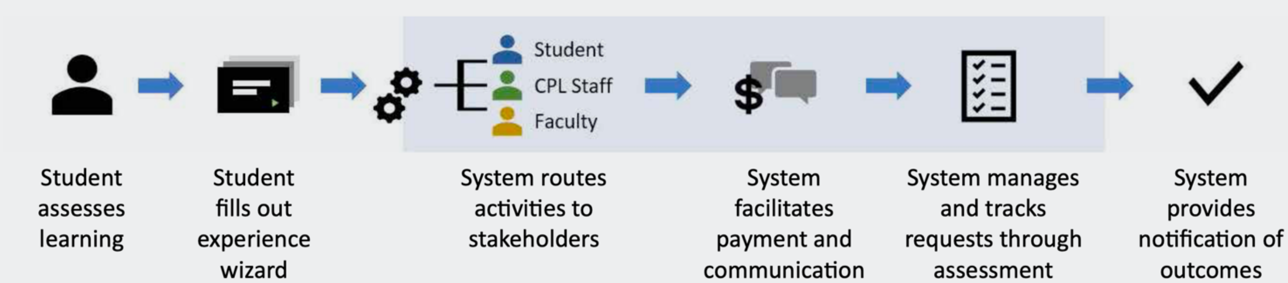
- **Centralized:** Collaborate on documentation, feedback and materials with students and evaluators
- **Efficient:** Receive 'action required' alerts — including requests, submissions, updates and more
- **Accountable:** Track assigned requests in a queue, and receive real-time notifications for tasks due

*Graphic Courtesy of South Central College*

MinnesotaCPL aims to simplify the process for students and empower college faculty and staff with collaborative tools to manage assessments and other administrative workflows around CPL. In addition to a more cost-effective and user-friendly process, the platform facilitates data analysis about CPL activities and outcomes.

### How MinnesotaCPL Works[45]

A centralized, collaborative, web-based interface manages the assessment workflow - from request to decision - serving students, faculty, CPL coordinators, and deans. By tracking the flow of requests, the process is simplified for students - and provides college faculty and staff with a powerful toolset to better manage timelines, accountability and interactions throughout the assessment process.

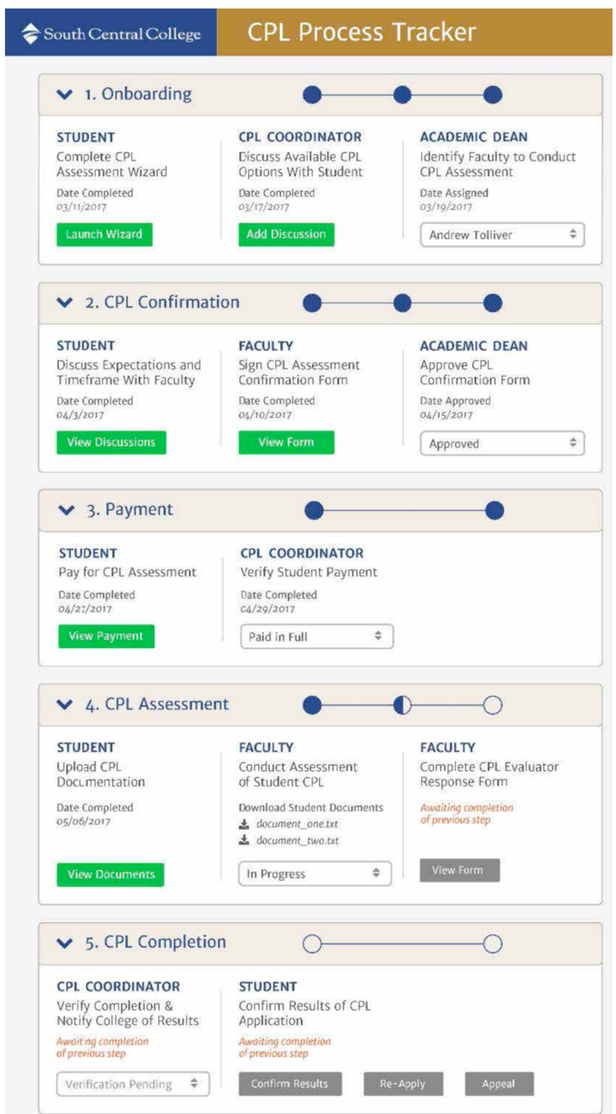



*Graphic Courtesy of South Central College*

1. The Credit for Prior Learning Wizard guides students through a small set of questions about their prior knowledge and helps them identify program(s) of interest and relevance to them.
2. When the student completes the Wizard, the responses are sent to the CPL Coordinator

[45] See page 112 for a more in-depth look at this process and an example of learner "journey mapping".

3. The CPL Coordinator analyzes the responses and reaches out to the student, working with them to determine the courses most appropriate to assess.
4. When an assessment for a course has been identified, a notification is emailed to the Dean of the program. The Dean chooses a faculty to do the assessment, who is notified in turn.
5. The faculty logs into the Wizard and can either accept or decline to perform the assessment. If they decline, the Dean is notified via email and they need to choose someone else.
6. If the faculty accepts, they must then connect with the student. Together, they determine how the assessment is to take place, and they fill out a CPL Assessment Confirmation Form.
7. This form is sent to the CPL Coordinator and the Business Office, which puts an assessment fee on the student's account.
8. When the student pays the assessment fee, the faculty is notified to proceed with the assessment.
9. Upon completion of the CPL assessment, the faculty uses the Wizard to select a grade for the student if the student was successful. If the student was unsuccessful in their assessment attempt the faculty selects that option and also gives a reason why.
10. The CPL Coordinator, the Dean, and the student are all notified of the assessment results via email. An email is also generated to the administrative assistants of the Deans so that they can go process the faculty's pay in Faculty Workload Management (FWM).




*Graphic Courtesy of South Central College*

# Veterans, Service Members, and CPL

Military veterans and service members have a variety of specialized skills, though many have only a high school diploma (or equivalent). This makes them uniquely well-positioned to benefit from credit for prior learning assessment.[46]

Establishing military crosswalks is often a comfortable first step into offering CPL, as college faculty and staff are generally committed to serving veterans and service members by recognizing the knowledge and skills they have earned while serving in the military.

## Joint Services Transcript

Assessing credit for prior learning starts with the Joint Services Transcript (JST). The JST is a uniform transcript of all military training and experience for service members of all branches except the Air Force (which has its own, regionally accredited transcript via Air University/Community College of the Air Force). The JST provides ACE credit recommendations and detail on:[47]

- Military course completions
- Military occupations
- Other learning experiences
- Results from assessments including CLEP and DSST Exams

## ACE Recommendations on College Credit

The American Council on Education (ACE) reviews military courses and on-the-job experiences (military occupations) and makes credit recommendations to colleges on their eligibility for college credit based on their content, scope, and rigor. These recommendations are developed by college and university faculty around the country actively teaching in the areas they review, and they appear on the Joint Services Transcript. Minnesota State colleges and universities are required by State Statute 197.775 (Higher Education Fairness)[48] to consider ACE recommendations, but faculty and transfer offices have some flexibility in how the recommendations are applied to general education courses, program requirements, program electives, or general electives.

**ACE Military Guide Online.**[49]

The ACE Military Guide Online is a resource that enhances the Joint Services Transcript and assist faculty to evaluate educational experiences in the military. It is an online web application that presents credit recommendations and detailed summaries for formal courses and occupations offered by all branches of the military, which can be analyzed against an individual's Joint Service Transcript (JST). Additional information on the ACE Military Guide for courses are minimum passing score, learning outcomes, instructional strategies, and methods of assessment. For military occupations, the ACE Military Guide provides additional information on learning outcomes.

In April 2021, the ACE Military Guide was modernized and now allows colleges and universities to create an account to upload JST, view equivalencies from colleges and universities across the country, and save equivalencies.

[46] CAEL Credit for Prior Learning Brief, available at https://www.cael.org/lp/cpl-pla
[47] For an example Joint Services Transcript, see: https://www.acenet.edu/Documents/Army-JST-Sample.pdf
[48] See https://www.revisor.mn.gov/statutes/cite/197.775
[49] The ACE Military Guide Online is available at: https://www.acenet.edu/news-room/Pages/Military-Guide-Online.aspx

## Military-Friendly Policies at Minnesota State

Minnesota State Colleges and Universities has implemented an accelerated process for awarding credit to service members and veterans.

- The accelerated approach starts with the ACE recommendations, correlating them to specific courses offered by the college or university. Faculty review and evaluate the credit recommendations from ACE and analyze if the recommendations align to courses taught at their institution.
- **Veterans Education Transfer System (VETS).**[50] Course equivalencies are submitted into the u.achieve platform and displayed in the Veterans Education Transfer System (VETS), an online service that helps veterans and service members determine how their military training and experience might translate into college credit within the Minnesota State system. VETS shows how many academic credits veterans and service members will earn for their military occupation prior to admissions, connects them to support services, and allows them to request a transfer evaluation. Additional credits could be awarded for military courses which are not displayed in VETS.

Other military-friendly policies at Minnesota State Colleges and Universities include:[51]

- **Application Fee Waivers** for active-duty service members and veterans.
- **"Call to Active Duty" Procedures** that help military personnel called to state and federal active duty get tuition refunds, retake courses at no charge, or obtain a passing grade if warranted by coursework completed prior to departure.
- **In-state Tuition Rates** for veterans and active duty military in Minnesota, their spouses and dependents.

## Other Resources for Veterans and Service Members

- The Minnesota Department of Veterans Affairs (MDVA) has Higher Education Regional Coordinators on each campus across the state to help veterans navigate resources and benefits.
- MDVA also hosts the site Mymilitaryeducation.org, which help veterans and service members navigate resources and provides checklists and other helpful tools, including a live chat line.
- Counties also provide Veterans Services Officers that can provide resources and support to ensure veterans and their families receive all the benefits and services to which they are entitled.
- All colleges and universities of Minnesota State have a Veterans Resource Center, and some retain a full-time staff person dedicated to serving veterans and service members.
- Every college and university as a "School Certifying Official" that facilitates military education benefit certification for veterans and service members.
- A number of Minnesota State colleges and universities are "Yellow Ribbon" Campuses, a designation proclaimed by the State of Minnesota that coordinates resources and infrastructure to proactively support service members and military families.[52]

[50] VETS can be found at https://www.minnstate.edu/college-search/public/military/

[51] For more information, see https://www.minnstate.edu/military/policies.html and System Procedure 3.35.3 - Military Courses and Occupations at https://www.minnstate.edu/board/procedure/335p3.html

[52] Learn more at https://www.minnstate.edu/military/yellowribbon.html

# Using Service Blueprints and Journey Maps

**Service Blueprints** and **Journey Maps** are two ways visualize processes and the learner experience of them. Whether you are designing an adult learner pathway, updating campus CPL processes, or mapping out services for learners, these tools can help you take a more student-centered approach. They originate from the field of "service design thinking"[53] which rests on the following principles reminiscent of our work in building adult learner pathways:

1. **User-Centered.** Services should be experienced through the customer's eyes.
2. **Co-Creative.** All stakeholders should be included in the service design process.
3. **Sequencing.** The service should be visualized as a sequence of interrelated actions.
4. **Evidencing.** Intangible services should be visualized in terms of physical artifacts.
5. **Holistic.** The entire environment of a service should be considered.

A **service blueprint**, sometimes called a process map, is a tool for specifying and detailing each individual aspect of a process or service. They are usually developed as a visual schematic incorporating the perspectives of both the end-user (the learner) and the relevant partners providing the service. They show both points of customer contact and behind-the-scenes processes.

- **Cultivating Teamwork.** Service blueprints are often produced collaboratively, and are an excellent venue for starting conversations between partners or the "siloes" of an organization. Creating a service blueprint collaboratively promotes co-operation and teamwork.
- **Improving Processes.** They can be used to streamline processes, highlight gaps in service or areas of duplication or coordinate people and resources.

A **journey map**, often part of a larger service blueprint, helps you zoom in on the learner's point of view, helping partners understand a current or future process in those terms. In particular, a journey map can help answer these questions:

- Where is action or initiative required on the part of the student? Where might there be risks of the ball being dropped, whether by the learner or the service provider(s)?
- Where are information gaps, assumptions about prior knowledge, and chances for confusion/ambiguity from the learner's perspective. What are the learner's informational needs?
- Where are "pain points" for learners, including uncertainties and unpredictabilities?
- What are the critical pieces of "physical evidence" experienced by the student (forms, instructions, email notifications, marketing materials, et cetera)?

Partners can use service blueprints to map the **"current state"** of a process in order to understand the student experience and gaps in service. That can also be used to map the **"future state" or "ideal state"** of a process helps you reinvent and improve the process.

Service blueprints should be seen as living documents, facilitated by an iterative process that invites inquiry, insight, and collaboration. Often the process of service blueprinting follows these steps:

1. **Collecting Data.** What do we know about the process, and the learner's experience of it? What can we observe to learn more? Is it possible to measure or quantify parts of the process?
2. **Finding Patterns.** What trends or behaviors emerge from our picture of the process?
3. **Gathering Insights.** What can we learn from the data and patterns we observe? What is working well, and what could be improved?
4. **Applying Insights.** What improvements will we make, and what is our plan for making it happen. Once we've made changes, we go back to step one, and repeat.

[53] For more information and resources, see www.thisisservicedesignthinking.com

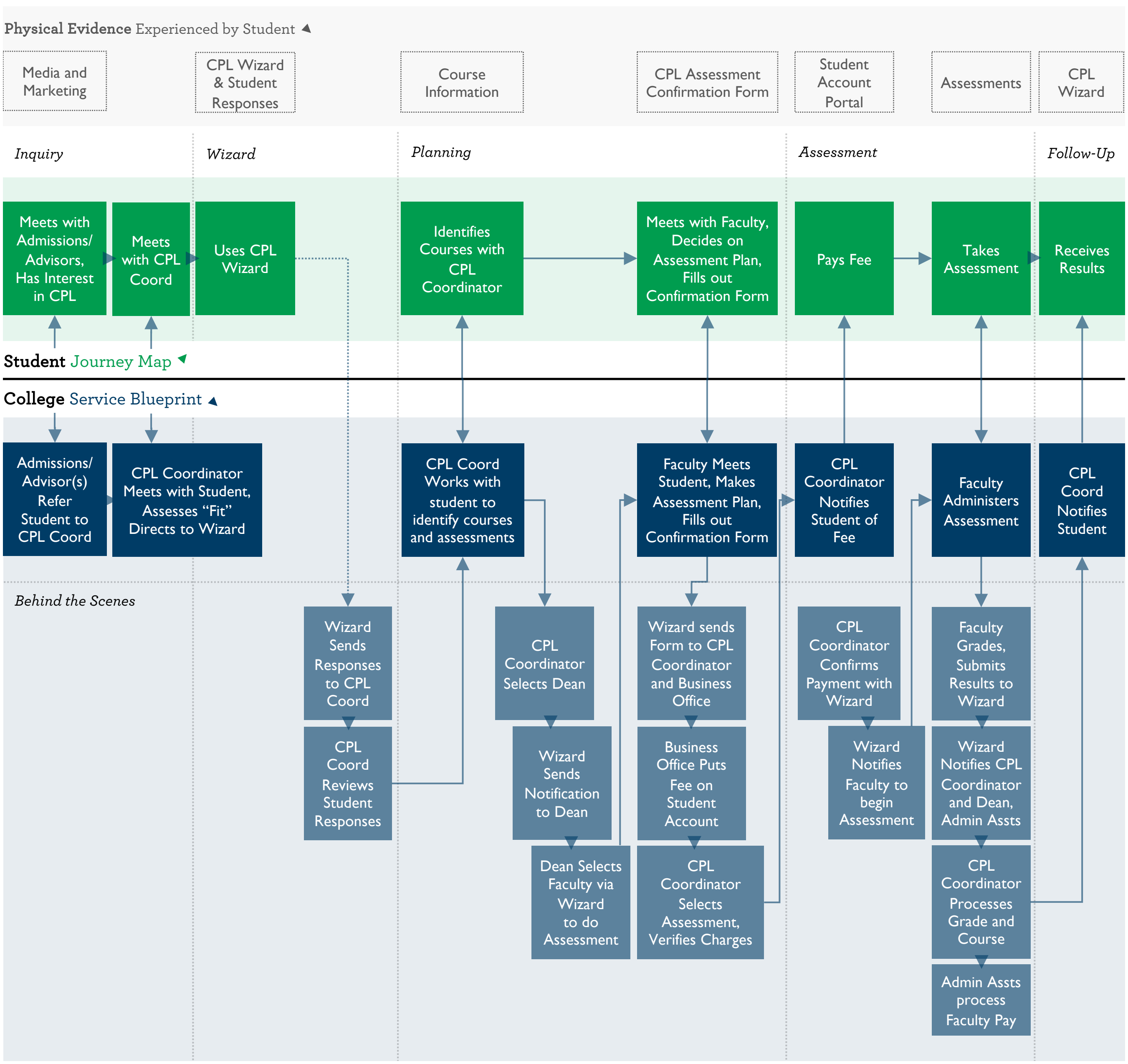
## Service Blueprint Example: South Central College CPL Process

*This is an example service blueprint and journey map, based on a process developed at South Central College (SCC) for handing the credit for prior learning process via the online wizard available at MinnesotaCPL.com.*

*Initially, the process was mapped in outline form by SCC staff (see the next page). The service blueprint was derived from that outline by the author, to show the reader what a service blueprint looks like, and to demonstrate the value of service blueprints in helping partners communicate, understand, and learn from existing or prospective processes/services.*

*What observations and questions come to mind as you examine the blueprint?*

### Service Blueprint and Journey Map: South Central College CPL Process



# South Central College CPL Process Outline

**Credit for Prior Learning Process (CPL)**

I.) The Student Inquiries
  a. There are several ways a student learns about CPL
    i. Admissions: Some students working with the admissions advisors will learn about CPL and then inquire about the process from there
    ii. Academic Advisors: Students meeting with an academic advisor will also learn about CPL during their meetings
    iii. Faculty Advisors: Students meeting with their faculty advisors will also learn about CPL from them
    iv. Media: There has been some media reporting on CPL
    v. Marketing: SCC and Minnesota State has had marketing campaigns where students learn of the CPL availability
  b. Once a student has learned about CPL
    i. Students are often referred to the CPL Coordinator for more information on the CPL process
      1. The coordinator then communicates with the student and helps to determine if they are a good candidate
      2. The coordinator also guides the student to www.minnesotacpl.com to complete a student profile
    ii. Some faculty work directly with the student before sending them to the CPL Coordinator. They have the student fil out their profile on the wizard, the online profile software for students to create a personal profile on the website www.minnesotacpl.com

II.) The student profile comes through
  a. Background on The Wizard: The Credit for Prior Learning Wizard will guide students through a small set of questions that will help us to learn about their prior knowledge and to determine the college and program(s) that interested them.
  b. The process
    i. Once the student has completed the Wizard questions, the CPL Coordinator is emailed their responses. The CPL Coordinator then can analyze the data and reach out to the student to work with them to determine which courses would be most appropriate to be assessed.
    ii. When an assessment for a course has been determined, the coordinator selects the appropriate Dean of the academic area.
    iii. The Dean of the program is sent a notification via email that someone needs to be assessed for that particular course. The Dean is then obligated to choose a faculty to do the assessment. This is all done through the Wizard and is completed within the software.
    iv. The faculty are listed in order of seniority within the Wizard
    v. Once the Dean chooses the faculty member, that faculty is sent an email to inform them of that decision.
    vi. The faculty logs into the Wizard and can either accept or decline to perform the assessment.
      1. If they decline, the Dean is notified via email and they need to choose someone else.
      2. If the faculty accepts, the faculty is then tasked with connecting with the student, determining how the assessment is to take place, and they fill out a form called the CPL Assessment Confirmation Form.
        a. This form is then sent to the CPL Coordinator and the Business Office so that the assessment fee can be put on the students account.
    vii. Once the CPL Assessment Confirmation Form is completed the faculty can upload it onto the student's profile within the Wizard, or the email it to the CPL Coordinator
      1. The CPL Coordinator then selects the appropriate assessment type and makes sure the charges are correct
      2. The coordinator then clicks the request payment under the CPL Types
    viii. The Business Office puts the charge on the student's account and uses one of the 4 assigned cost centers determined by academic area
    ix. The Coordinator is notified via email from the Business Office that the fee is on the account
    x. When the student pays the fee
      1. There is no automated notification because of the software we use at this time
        a. The coordinator checks the student's account record in ISRS to see if the fee has been paid
        b. The student emails the coordinator to notify them the fee has been paid
      2. When the fee has been paid, the coordinator clicks the payment confirmation button within the Wizard. This sends an email to faculty and the student that the assessment can begin
    xi. The student and faculty complete the assessment
      1. Upon completion of the CPL assessment, the faculty uses the Wizard to select a grade for the student if the student was successful.
      2. If the student was unsuccessful in their assessment attempt the faculty selects that option and gives a reason why.
      3. The faculty also list the competencies
        a. Whether the competency is mandatory to pass

    b. The percentage of passing each competency

  4. The faculty submits their findings and the grade

xii. The CPL Coordinator, the Dean, and the student are all notified of the assessment results via email.

xiii. An email is also generated to the administrative assistants of the Deans so that they can go process the faculty's pay in Faculty Workload Management (FWM).

xiv. The coordinator then processes the grade and course

xv. Finally, the coordinator archives the student's profile in the Wizard.

# Appendices

# Relevant Minnesota State System Policies and Procedures

Board Policy 3.35 - **Credit for Prior Learning**
https://www.minnstate.edu/board/policy/335.html

System Procedure 3.35.1 - **External Assessments**
https://www.minnstate.edu/board/procedure/321p1.html

System Procedure 3.35.2 – **Internal Assessments**
https://www.minnstate.edu/board/procedure/335p2.html

System Procedure 3.35.3 - **Military Courses and Occupations**
https://www.minnstate.edu/board/procedure/335p3.html

Board Policy 3.21 - **Undergraduate Course and Credit Transfer and the Minnesota Transfer Curriculum**
https://www.minnstate.edu/board/policy/321.html

System Procedure 3.21.1 - **Transfer of Undergraduate Courses, Credit, Associate Degrees & Minnesota Transfer Curriculum**
https://www.minnstate.edu/board/procedure/321p1.html

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# Glossary

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| Ability to Benefit (ATB) | Ability to Benefit (AtB) is a provision in the Higher Education Act (HEA) that (1) allows a student who has not received a high school diploma or equivalent (HSD/E) to be eligible to enroll, and also to receive Title IV Federal student aid, and (2) requires enrollment in an approved career pathway, and (3) requires participation in supportive services, e.g., orientation, career guidance. See page 66. |
| Academic Credit / Credit Hour | The unit of measurement an institution awards when the determined course or subject requirement(s) is fulfilled. A "credit hour" is defined federally (34CFR 600.2; 11/1/2010) as an amount of work represented in intended learning outcomes and verified by evidence of student achievement that is an institutionally-established equivalency that reasonably approximates not less than (1) One hour of classroom or direct faculty instruction and a minimum of two hours out-of-class student work each week for approximately 15 weeks for one semester hour of credit, or the equivalent amount of work over a different amount of time; or (2) At least an equivalent amount of work as required in paragraph (1) of this definition for other activities as established by an institution, including laboratory work, internships, practica, studio work, and other academic work leading toward to the award of credit hours. |
| Academic Programs | A cohesive arrangement of college-level curricular requirements leading to a certificate, diploma or degree. Academic programs often have admissions requirements in addition to those of their college or university. |
| Adult Basic Education (ABE) | Minnesota Adult Basic Education (ABE) is a state-wide system that serves approximately 65,000 adults annually. ABE students are working towards a high school credential, learning English, improving basic skills such as literacy and math, and/or preparing for post-secondary education or employment. ABE is funded with both federal and state funds, and services are delivered through a network of 39 consortia comprising all Minnesota school districts as well as other partners including the correctional system and community-based organizations. |
| American Council on Education (ACE) | A membership organization that mobilizes the higher education community to shape effective public policy and foster innovative, high-quality practice (American Council on Education [ACE], About ACE, n.d.). |
| Articulation Agreement | An agreement created between workforce development training programs and college programs. Most often these are program specific. Agreements generally are used to outline process for receiving program admittance or credits based on completion of workforce program. Usually developed as a unique agreement between a college and CBO. |
| Assessment | The use of standardized instruments, interviews, or other means to determine factors that may contribute to the success of students in career and technology programs. These factors may include interest, aptitude, academic achievement, work experience, learning style, work values, and other traits. Assessment may also be administered to determine progress attained by students during training or areas of need to address through remediation. See also "External Assessments" and "Internal Assessments". |
| Basic Skills | Basic academic and tutorial services designed to increase literacy levels, upgrade literacy, and improve listening and speaking skills. |

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| Braided Funding | Braided funding is a funding and resource allocation strategy that taps into existing categorical funding streams and uses them to support unified initiatives in as flexible and integrated a manner as possible. Braided funding streams remain visible to program operators but invisible to the participants benefiting. Braided funding maximizes the strengths of each partner and builds an overall more effective system. Each public funder maintains responsibility for tracking and accountability of its funds. |
| Bridge Programs | Programs designed for individuals whose skills do not meet minimum requirements for degree certificate programs. Bridge programs allow learners to start from their current skill level and develop the basic skills they need to begin the training program that is their ultimate goal. Pre-college "bridge" programs provide low-skilled adults with "on-ramps" (entry points) to postsecondary education and training. These are generally accelerated or contextualized programs that integrate adult basic education (including, as appropriate, English language learners) with occupational skills training and result in credit- bearing certificates and degrees that are valued by employers and can be applied toward additional education or training. |
| Career Academies | Operating as schools within schools, career academies are small learning communities, which are organized around such themes as health, business and finance, computer technology, and the like. Academy students take classes together, remain with the same group of teachers over time, follow a curriculum that includes both academic and career-oriented courses, and participate in work internships and other career-related experiences outside the classroom. Over time, improving the rigor of academic and career- related curriculum has become an increasingly prominent part of the career academies agenda. |
| Career Ladder/Career Lattices | Career ladders and lattices consist of a group of related jobs that make up a career. They often include a pictorial representation of job progression in a career, as well as detailed descriptions of the jobs and the experiences that facilitate movement between jobs. Career ladder/lattices are not necessarily organization-specific; they frequently span multiple organizations because movement within one organization may not be possible. Career ladders display only vertical movement between jobs. In contrast, career lattices contain both vertical and lateral movement, and may reflect more closely the career paths of today's work environment. |
| Career Navigator | A common role with workforce development organizations, the career navigator expands upon the traditional career counselor role to provide wholistic and highly personal services. Often a navigator is assigned to individuals at intake and guide them through a process of assessment, career counseling, skill attainment and education, job search, job placement and transitioning to work. |
| Career Pathways | The term "career pathway" means a combination of rigorous and high- quality education, training, and other services that: (1) Aligns with the skill needs of industries in the economy of the state or regional economy involved; (2) Prepares an individual to be successful in any of a full range of secondary or postsecondary education options, including registered apprenticeships; (3) Includes counseling to support an individual in achieving the individual's education and career goals; (4) Includes, as appropriate, education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster; (5) Organizes education, training, and other services to meet the particular needs of an individual in a manner that accelerates the educational and career advancement of the individual to the extent practicable; (6) Enables an individual to attain a secondary school diploma or its recognized equivalent and at least one recognized postsecondary credential; and (7) Helps an individual enter or advance within a specific occupation or occupational cluster. |

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| Career Technical Education (CTE) | Career and technical education is a term applied to schools, institutions, and educational programs that specialize in career-focused programs that prepare students both for college and careers. Career and technical education programs offer both academic and career-oriented courses, and many provide students with the opportunity to gain work experience through work-based learning, such as internships, on- the-job training, and industry-certification opportunities. Career and technical education programs provide a wide range of learning experiences spanning many different career fields and industry sectors. Career and technical education may be offered in middle schools, high schools, vocational-technical schools, or through community colleges and other postsecondary institutions and certification programs. |
| Case Management | Case Management is the responsibility for directing and managing a student's participation in the program, which typically includes non-instructional activities such as recruitment, retention, program component navigation, life skill or life issue assistance, academic, career or personal counseling, financial aid guidance, and other supportive services. |
| Certificate | An academic credential earned by acquiring competence(s) through a set of learning outcomes and formal assessment that is recognized by business and industry, workforce and training organizations, and accredited higher education institutions (Minnesota State system, CCCPL Team Report, 2015). |
| Cohort Model | Providing services, including training or education services to a distinct group that progresses through a program or series of services together. This is a closed enrollment model that generally includes recruiting and assessing participant interest and readiness prior to being "assigned" to the cohort. |
| Common Course Outlines | Minnesota State Colleges and Universities use Common Course Outlines to "translate" and compare their own courses, by identifying their fundamental building blocks in a standard way. CCOs are required for accreditation, and available on the web for all Minnesota State courses. CCOs provide the following information on a course: (1) A brief course description, (2) Major Content Areas covered by the course, (3) Learning Outcomes of the course, and (4) Methods for Evaluating Student Learning. See page 73. |
| Competency-Based Education (CBE) | A focus on learning and the application of that learning, rather than on the time spent in class or on materials. Progress is measured by learners demonstrating what they know and can do through a system of rigorous assessments (Minnesota State system, CCCPL Team Report, 2015). |
| Contextualized Instruction | Instruction that embeds traditional academic content (e.g., reading, writing, mathematics) within content that is meaningful to students' daily lives and/or interests. Information is usually related to general workplace skills or a specific field or trade. |
| Council for Adult and Experiential Learning (CAEL) | A national nonprofit organization that works within the higher education, public, and private sectors to ensure institutions are successful in supporting adult students in reaching their educational goals. CAEL's "Standards for Assessing Learning" serve as a guide for institutions to use in creating, implementing, and evaluating assessment strategies. |
| Course Equivalency Credit | Credit awarded when prior learning is assessed based on the documented achievement of course specific learning outcomes or competencies. |

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| Credentials | There are many different types of credentials offered or awarded by various types of organizations. Within the context of education, workforce development, and employment and training for the labor market, the term credential refers to a verification of qualification or competence issued to an individual by a third party with the relevant authority or jurisdiction to issue such credentials (such as an accredited educational institution, an industry- recognized association, or an occupational association or professional society). The range of different types of credentials includes: (1) Educational diplomas, certificates, and degrees; (2) Registered apprenticeship certificates; (3) Occupational licenses (typically awarded by state government agencies); (4) Personnel certifications from industry or professional associations; and (5) Other skill certificates for specific skill sets or competencies within one or more industries or occupations (e.g., writing, leadership, etc.). |
| Credit by Examination/Test Out | Credit by Examination/Test Out is an opportunity for a student to demonstrate college-level learning through course-specific examination designed by college faculty in areas including Composition and Literature, World Languages, History and Social Sciences, Science and Mathematics, and Business. |
| Credit for Prior Learning (CPL) | Credit earned by a learner who demonstrates knowledge, skills, and abilities acquired through work, professional training, military education and occupations, and other learning experiences and assessed by academically sound and rigorous processes (Minnesota State system, CCCPL Team Report, 2015). This term is often used interchangeably with Prior Learning Assessment (PLA), for the purposes of this guide CPL is used. See page 101. |
| Credit for Prior Learning Assessment | College or university assessment methods and processes used by Minnesota State faculty members to assess students' demonstrated learning and/or competence. Such assessments determine competence-to-credit comparability, course-equivalency or individualized subject status, and application to degree requirements or electives. CPL internal assessment types may include, but are not limited to, credit by exam, prior learning portfolio assessment, individualized subject-area assessment, group or seminar assessment, and competency-based assessment. |
| Credit Hours | Credit hours are the building block components of educational credentials (diploma, certificate, and degree). See "Academic Credit / Credit Hours". |
| Crosswalk | A side-by-side comparison between competencies attained outside the traditional classroom and the learning outcomes of a specific college course or program. A crosswalk is created when faculty map competencies to curriculum credit in order to communicate pre-approved course or program equivalents. See page 76. |
| Customized Training (also known as "Workforce Solutions") | Customized training is designed by colleges and universities to meet the special requirements of an employer or group of employers, often short-term, not-for-credit, and conducted with a commitment by the employer to employ all individuals upon successful completion of training. The employer often pays for a significant share of the cost of the training. |
| Data Sharing Agreement | To share data, partners should have a detailed data sharing agreement in place that demonstrates the partners' legal basis for collecting and sharing the data vis-à-vis the Minnesota Data Privacy Act, FERPA, and other applicable laws. Data sharing agreements also stipulate the data to be collected, data security measures to be taken, how data will be reported and handled, and other details. See page 37. |

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| Dean | Deans manage faculty, teaching, advising, and course scheduling. Deans often interface with a wide array of offices, individuals, and interest groups—including faculty unions—on campus, and their role is often to balance the interests of those groups while making progress on day-to-day operations and broader strategic initiatives. See page 25. |
| Dual Enrollment/Dual Credit | Postsecondary enrollment option that allows secondary students to enroll in courses at institutions of higher education. The intent of the program is two-fold: (1) to provide students with opportunities for additional academic challenges and rigor, and (2) to offer an alternative educational setting, which may stimulate interest and motivation in learning. |
| Eligible Training Provider List (ETPL) | Includes Minnesota training providers that are approved by the Minnesota Office of Higher Education. Approval requires a Physical location in Minnesota and that providers are licensed, registered or exempt from OHE. Courses and programs are certified, rather than schools, institutions or providers. Additionally, courses on ETPL must be open to the public versus a closed enrollment course (such as open only to employees of a business) |
| External Assessment | Assessment methods and processes at the colleges or universities of Minnesota State that could result in credit for prior learning achieved and assessed through a nationally recognized third-party assessment agency or organization, regionally or nationally accredited postsecondary institution, or noncredit instruction. Students demonstrate a level of proficiency that is recognized through curriculum, instruction, program or a standardized exam. CPL external assessment types may include, but are not limited to, AP, IB, CLEP, and other national standardized assessments, world languages seals and certificates, industry recognized credentials, licenses, and certifications, and noncredit instruction in programs such as registered apprenticeships, continuing education, and customized training. |
| Faculty | Faculty includes the professors, teachers, and lecturers of a university or college. Generally, the faculty is responsible for designing and disseminating the plans of study offered by the institution. The term is also used at the secondary system. |
| Formal Learning | Intentional learning that happens in college classes or professional training (The Council for Adult & Experiential Learning [CAEL], The Hidden Classroom of the Workplace, 2014). |
| Industry Credential | A credential that is either (1) developed and offered or endorsed by a nationally recognized industry association or organization representing a sizeable portion of the industry sector, or (2) a credential that is sought or accepted by companies within the industry sector for purposes of hiring or recruitment, which may include credentials from vendors of certain products (Ohio Department of Higher Education, Certificates and Credentials, n.d.). |
| Industry or Sector Partnership | A workforce collaborative convened by or acting in partnership with a state board or local board that: (1) Organizes key stakeholders in an industry cluster into a working group that focuses on the shared goals and human resources needs of the industry cluster and that includes, at the appropriate stage of development of the partnership, a broad base of representatives including businesses, institutions of higher education, representatives of government, workforce agencies, labor organizations, and workforce boards, and (2) May also include representatives of state or local government; state or local boards, state or local economic development agencies, state workforce agency other state or local agencies, business or trade associations, economic development organizations, nonprofit organizations, community-based organizations, philanthropic organizations, and industry associations. |

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| Informal Learning | Experiential learning that occurs when someone is exposed to situations that facilitate acquiring knowledge or a new skill (CAEL, The Hidden Classroom of the Workplace, 2014). |
| Institutional Research Board (IRB) | Institutional Research Boards review and approve program evaluation and research projects to ensure that all human subjects protections are in place in instances where information gathering involves contact with recipients, or when personal data is requested by external researchers. See page 38. |
| Integrated Student Records System (ISRS) | The ISRS has been the cornerstone data system for the colleges and universities of Minnesota State for more than 20 years. ISRS was originally developed by in-house information technology professionals to meet the needs of Minnesota's state colleges and universities after merging as a single system. Campus needs grew over the decades and ISRS grew to meet those needs. Today nearly 400,000 students, faculty, and staff use ISRS, but the architecture undergirding ISRS is rapidly growing obsolete. ISRS will be replaced soon by the NextGen system. See page 37. |
| Internal Assessment | College or university assessment methods and processes used by Minnesota State faculty members to assess students' demonstrated learning and/or competence. Such assessments determine competence-to-credit comparability, course-equivalency or individualized subject status, and application to degree requirements or electives. CPL internal assessment types may include, but are not limited to, credit by exam, prior learning portfolio assessment, individualized subject-area assessment, group or seminar assessment, and competency-based assessment. |
| Intrusive Advising | Intrusive advising on a college campus widens the scope of a typical academic advisor and has the benefit of being present on campus. Intrusive advisors understand the inner workings of the college and are well-situated to help the student navigate the many offices, processes, and resources available on a campus. The downside, however, is that their scope is limited, and their work only begins once the student is on campus. See page 45. |
| Joint Services Transcript | The JST is a uniform transcript of all military training and experience for service members of all branches except the Air Force (which has its own, regionally accredited transcript via Air University/Community College of the Air Force). The JST provides detail on: military course completions, military occupations, other learning experiences, and results from assessments including CLEP and DSST Exams. See page 113. |
| Journey Map | A journey map, often part of a larger service blueprint, helps you zoom in on the learner's point of view, helping partners understand a current or future process in those terms. See page 115. |
| Mastery-Based Learning | Masterly-based learning is a promising approach that is highly-personalized and honors learners' assets and experiences. Students take ownership of their learning and receive differentiated instruction based on their interests and needs. See page 73. |
| Military Courses | A curriculum with measurable outcomes and learning assessments that service members are required to successfully complete based on their military occupation. |
| Military Occupations | A service member's job(s) while in the military. |

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| Minnesota State College Faculty (MCSF) | Minnesota State College Faculty is the exclusive representative for public, two-year college faculty in Minnesota. As such, MSCF negotiates, enforces, and defends the Contract with Minnesota State Colleges and Universities (MnSCU) and seeks to expand and improve faculty professional life in all aspects. |
| Minnesota Transfer Curriculum (MnTC) | Curriculum comprised of general education courses, goal area definitions, and competencies that transfer between Minnesota public colleges and universities. The Minnesota Transfer Curriculum (MnTC) is the basis for the general education requirements at institutions that are part of the Minnesota State system. Completion of the MnTC requires at least 40 credits and a specified number of courses or credits taken from each of the 10 MnTC goal areas. The MnTC must be completed with a minimum 2.0 GPA. |
| Modular Curriculum | Also referred to as "chunked" curriculum. Curriculum that is divided into more manageable “chunks” or modules with the purpose of improving degree completion rates among non-traditional learners. Generally, each chunk leads to employment and connects to the next chunk, eventually leading to completion of an industry-recognized professional-technical degree. Chunking is one element in a comprehensive career pathways system. |
| Navigation (Holistic) | Holistic navigation is broader in scope, and starts earlier in the learner’s journey. This allows the navigator to build more trust, with less bias toward any particular institution. They are able to help the student navigate the wider ecosystem of resources and supports, of which college is just one part. The challenge, at least with regard to college, is that external navigators may not be fully aware of the resources available at each college, or how to most effectively navigate processes on each campus. See page 45. |
| On-the-Job Training | Training by an employer that is provided to a paid participant while engaged in productive work in a job that provides knowledge or skills essential to the full and adequate performance of the job; provides reimbursement to the employer of up to 50 percent of the wage rate of the participant, and is limited in duration as appropriate to the occupation and the participant. |
| Onramp | See "Bridge Program". |
| Pathways Programs | Programs with a stated goal of moving students through different levels of education programing towards a college credential. Often pathways initiatives are grant funded. Increasingly government and philanthropic funds are seeking programs that model pathways to college credentials. |
| Portable Credential | A credential is considered portable when it is recognized and accepted as verifying the qualifications of an individual in other settings - either in other geographic areas, at other educational institutions, or by other industries or employing companies. |
| Portfolio Assessment | Portfolio Assessment is an evaluation of a portfolio is a method of prior learning assessment that includes, but is not limited to: documentation review; candidate interview; performance assessment; product review; a combination of these methods; or other means. |

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| Program of Study | Incorporates secondary and postsecondary elements; includes coherent and rigorous content aligned with challenging academic standards and relevant career and technical contents in a coordinated, non-duplicative progression of courses that align secondary to postsecondary education; may include opportunity for secondary education students to gain postsecondary education credits through dual or concurrent enrollment programs or other means; and leads to an industry-recognized credential or certificate at the postsecondary level or an associate or baccalaureate degree. See [http://cte.ed.gov/initiatives/programs-of-study](http://cte.ed.gov/initiatives/programs-of-study) |
| Registrar | An officer at a college or university who keeps the records of enrollment and academic standing. |
| Release of Information | A release of information is a formal document demonstrating the permission of a student or research subject to share their personal data with an organization or institution. It is typically a requirement in inter-agency data sharing arrangements. See page 35. |
| Release Time | Time and compensation to faculty for duties performed outside their normal job responsibilities. |
| Service Blueprint | A service blueprint, sometimes called a process map, is a tool for specifying and detailing each individual aspect of a process or service. They are usually developed as a visual schematic incorporating the perspectives of both the end-user (the learner) and the relevant partners providing the service. They show both points of customer contact and behind-the-scenes processes. See page 115. |
| Stackable Credential | A credential is considered stackable when it is part of a sequence of credentials that can be accumulated over time to build up an individual's qualifications and help them to move along a career pathway or up a career ladder to different and potentially higher-paying jobs. For example, one can stack a high school diploma, an associate's degree, and then typically obtain two more years of appropriate postsecondary education to obtain a bachelor's degree. An individual can also stack an interim career/work readiness or pre-apprenticeship certificate, then complete an apprenticeship, and later earn a degree or advanced certification. |
| Supportive Services | Services such as transportation, childcare, dependent care, housing, and needs-related payments, which are necessary to enable an individual to participate in activities authorized under WIOA. |
| Tennessen Warning | Specific information government must give a person when government collects data from that person. Named after the senate author of the original Data Practices Act – Bob Tennessen. |
| Transcript | The official school record of a student's performance showing all course work completed, including course titles, course hours, grades or other evaluations earned, and grading scale. |
| Transfer | An increasingly complex concept, this document is using the word transfer to refer to any number of policies or processes that support credit from previous education or learning being applied to a current or future learning/credential goal. Most often transfer refers to externally gained knowledge, skills or credits, but in some cases it can refer to transfer within an institution, i.e., noncredit instruction to credit or between two program or discipline areas. Transfer strategies may include additional processes, including prior learning assessment, articulation agreements, etc. |

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| Work-Based Learning | Work-based learning enables participants to gain or enhance their skills while employed or while engaged in an experience that is similar to employment. Examples: workplace simulations, career academies, school-based enterprises, cooperative work and study programs, on-the-job-training, incumbent worker training, job shadowing, pre-apprenticeship, apprenticeships, fellowships, and paid or unpaid work experience. |
| Workforce Development Board (Local and State) | Local Workforce Boards oversee the local administration of federal (and sometimes state) workforce development funds, and are comprised of workforce, education, nonprofit, and industry members, as well as local elected officials. Every state is divided into workforce development areas, with a local board overseeing each. In addition, each state has a state workforce board, an oversight board responsible for overseeing WIOA core programs including the development of a state plan. The membership of the board is appointed by the Governor with the majority being business representatives and the remaining representing diverse interests to include: state legislators, leadership of core programs under WIOA, representatives of community-based organizations that deliver employment and training programs and serve populations with barriers to employment, and economic development organizations. |

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