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EVALUATION SYNOPSIS / JANUARY 2013

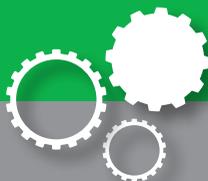
Shifting Gears

**Building new pathways for low-skilled workers
to succeed in the 21st century economy**



The Joyce Foundation

The Joyce Foundation supports the development of policies that both improve the quality of life for people in the Great Lakes region and serve as models for the rest of the country. The Joyce Foundation's grant making supports research into Great Lakes protection and restoration, energy efficiency, teacher quality and early reading, workforce development, gun violence prevention, diverse art for diverse audiences, and a strong, thriving democracy. The Foundation encourages innovative and collaborative approaches with a regional focus and the potential for a national reach.



Special Thanks

The Joyce Foundation would like to thank our partners who helped develop, manage, assess, measure and communicate the goals and results of the Shifting Gears Initiative:

CLASP (Center for Law and Social Policy) provided ongoing policy guidance and coordinated communications efforts, including maintenance of the Shifting Gears website and distribution of a quarterly newsletter.

The Workforce Strategy Center (WSC) provided peer learning experiences through conferences and webinars.

Davis Jenkins, Ph.D., Senior research Associate, Community College research Center, Teacher's College, Columbia University, and Tim Harmon, research coordinator with the Office of Community College research and Leadership at the University of Illinois, Urbana-Champaign advised on using state data to inform improvements to policy and practice.

Douglas Gould & Co. (PublicVoice) provided communications and advocacy support and technical assistance.

Brandon Roberts + Associates designed and implemented the Shifting Gears initiative evaluation process, with assistance from Derek Price, Ph.D., of DVP-Praxis, Ltd.

The full **Shifting Gears Five Year Evaluation Report** produced by Brandon Roberts + Associates and Derek Price can be found on the Joyce Foundation website at (www.joycefdn.org/shifting-gears). Their evaluation served as a guide for this synopsis, and much of the following content has been adapted directly from their full report.

Letter from the President

Dear Colleague:

Thank you for your interest in the Shifting Gears initiative. I hope this evaluation synopsis will provide you with actionable insights for improving and adapting education and workforce development systems for the challenges of the 21st century economy. The full evaluation can be found at www.joycefdn.org/shifting-gears.

The Joyce Foundation developed and invested over \$8 million in the Shifting Gears initiative to address a growing gap between the skills demanded by employers and the skills possessed by workers in the Great Lakes region. The effects of this skills gap have wide-reaching implications for the national economy. And, too many working-age adults are unable to adequately support themselves and their families because they lack the skills necessary to sustain families.

Shifting Gears is an ambitious project designed to spur systemic change – through collaboration and new ways of thinking among leaders at adult basic education agencies, community and technical colleges and workforce development programs. *Cross-agency teams from six Midwest states accepted our challenge: to develop and make changes throughout these systems to help low-skilled adults obtain in-demand skills and post-secondary credentials.*

We are proud of the progress made in five years' time. Despite challenges faced by state leadership teams, new education and training programs designed specifically for low-skilled adults are up and running, and are showing great promise. These innovative programs, while initially small-scale, are poised for expansion.

Just as importantly, Shifting Gears has spurred education and workforce development leaders to champion ideas for new policies, cross-system partnerships, and programmatic approaches. These ideas have and will continue to help shape the national conversation on addressing the skills gap, while influencing federal policy and funding.

I would like to express my heartfelt thanks to the organizations and government agencies that embraced the Shifting Gears initiative. Many of these organizations and their staffs took risks and agreed to work in unfamiliar ways. I'm confident the results of their hard work and the experience gleaned are – and will be – well worth it. I'm equally certain the students whose careers and lives have been improved through their efforts would agree.

Sincerely,

Ellen S. Alberding
President, The Joyce Foundation

An Overview

Shifting Gears

The United States faces an increasing gap between the skills possessed by its workforce and those that are necessary to succeed in the 21st century economy. This gap poses a threat to the financial wellbeing of low-skilled American workers and their families and to the nation's long-term economic growth.

Recognizing the threat posed by these economic realities and demographic trends, the Joyce Foundation launched the Shifting Gears initiative to bolster efforts in six Midwest states to help working-age adults who need to expand their skills.

Over a five-year period starting in 2007, four of the six states adopted innovative strategies and changed policies to better serve low-skilled workers within adult basic education, workforce development and community and technical college systems.

One of the challenges facing the states had been that these systems have tended to operate independently, but Shifting Gears spurred them to work collaboratively. The result: creation of pathways for low-skilled adults to move easily from one system to the other – with the ultimate goal of obtaining marketable skills and postsecondary credentials.

About 4,000 low-skilled adults have enrolled in new programs across these four states, a modest number but one expected to grow considerably during the next several years as these innovative strategies are embraced more broadly.

Leaders in the states—representing adult basic education, workforce development, and community and technical college systems—have not yet fully achieved change across all these systems, nor were they expected to have done so by the end of the five-year Shifting Gears project. But their initial successes have put them on a positive trajectory towards this longer-term goal. These state leadership teams now face the challenge of expanding their successful yet presently small-scale programs, while ensuring that resources are available to maintain their long-term sustainability.

The Growing Nationwide Skills Gap

Over the past decade, the gap in earnings between high school and college graduates has widened. Workers with a bachelor's degree can expect to earn on average 84 percent more than workers with only a high school diploma during their lifetime and one-third more than associate degree holders.ⁱ Obtaining even short-term postsecondary credentials produces a bump in earnings—*good news for the more than one in ten workers who report a postsecondary certificate as their highest level of education*. On average, postsecondary certificate holders earn 20 percent more than high school graduates without any postsecondary education.ⁱⁱ

Moreover, the weak economic recovery has been harder on workers with low levels of education: they are more likely to be unemployed than those in their age group with postsecondary credentials. Among adults 25 and older, 14 percent without a high school diploma were unemployed in 2011, and nearly 10 percent with only a high school diploma were jobless.

By contrast, adults over 25 with a postsecondary degree had lower rates of joblessness than the national average of 7.6 percent, ranging from 4.6 percent for Bachelor's degree holders to 6.8 percent for Associate's degree holders.ⁱⁱⁱ

A major driver of the widening gap in wage and employment levels has been employers' rising demand for workers with postsecondary credentials. It is estimated that two-thirds of all job openings through 2018 will require at least some postsecondary education and skills development.^{iv}

There is a clear need for new strategies and bold actions to ensure that low-skilled adults will not continue to be left behind in the evolving 21st century economy. These workers will require education and skills development beyond high school to qualify for high-demand jobs, avoid bouts of unemployment and earn a decent living.

We as a nation must tackle this issue not just for the wellbeing of low-skilled adults and their families, but also to make sure we build the skilled workforce needed to sustain long-term economic growth.

Shifting Gears

Empowering States to Close the Skills Gap

Between 2007 and 2011, the Joyce Foundation awarded grants totaling \$8 million to Indiana, Illinois, Michigan, Minnesota, Ohio, and Wisconsin with the expectation the states would develop new ways to make existing education and skills development systems work better for adult learners.

How? By developing innovative ideas and policies enabling low-skilled adults to advance in education and training and move up in the labor market.

Foundation leaders understood that satisfying employer needs for a better-educated workforce would hinge on increasing the education levels of adults *already* in the labor market. According to the U.S. Bureau of Labor Statistics, the share of the labor force between the age of 25 and 44 is expected to grow considerably over the next decade, while the share between the age of 16 and 24 will decline.^v

When Shifting Gears launched, state systems for adult basic education or workforce development were not typically designed to help low-skilled adults move into and succeed in college. Nor were state postsecondary institutions prepared to educate them.

Simply put, helping adult learners obtain postsecondary credentials was not a priority. These three distinct systems – adult basic education, workforce development and community and technical colleges – operated independently with minimal if any alignment of mission or program offerings. Any strategy to accomplish the goals of Shifting Gears would require a far more unified effort.

The Shifting Gears Theory of Change

Shifting Gears set the expectation from the outset that states needed to pursue a *systems change agenda*: that states could succeed in increasing the number of low-skilled adults with postsecondary credentials *only* if they replaced old education and workforce services with better aligned, more cohesive approaches designed with the real needs and circumstances of low-skilled adults in mind.

State agency leaders representing the three disparate systems – adult basic education, workforce development and community and technical colleges – needed to develop a common vision to improve postsecondary entry and success of low-skilled adults. And then, they needed to collaborate on policy reforms to achieve it.

More pointedly, Shifting Gears was about getting state agency leaders to make this a *priority* and then *retool and align* their operations accordingly. Shifting Gears presumed that this approach would spur the introduction of innovative strategies within and across all three systems. This presumption has proven out to a significant extent.

Recognizing that systems change would be complex and multifaceted, the Shifting Gears initiative provided states with a framework for identifying, adopting and implementing innovative strategies for more effective transitions postsecondary education for adults.

State Shifting Gears teams were instructed to undertake a set of six core activities across multiple fronts:^{vi}

- 1 Collaborate to align the work of adult basic education, workforce development and community and technical college systems
- 2 Expand state commitment and leadership in support of this work
- 3 Adopt and implement necessary policy changes
- 4 Engage the field of practice and other stakeholders
- 5 Use data to inform and guide the work
- 6 Use multiple communications channels to build awareness and support

In addition to its funding and leadership, the Joyce Foundation also provided technical assistance to support state efforts toward comprehensive, permanent system change.

Recognizing that some states might be better prepared than others to undertake a systems change approach, Joyce operated in two phases during the five-year project period ending in December 2011:

- 1 **During the initial phase, encompassing the first three years, cross-agency teams in each state were expected to work toward consensus on policies and coordinated actions.** These teams varied somewhat, but typically included the state's adult education director, a senior leader from the state workforce system, senior leaders from the community and technical college system representing career technical education and sometimes academic instruction, workforce investment board representatives, employers, community advocates, and others.
- 2 **In the second phase, covering the last two years of the initiative, states agencies were expected to *adopt* the policy agenda and implement new, innovative strategies for delivering education and skills development. State teams could no longer use the Joyce grant to finance their efforts at this point and were encouraged to use state, local and other resources for this purpose.**

The Joyce Foundation recognized that change would not come easily or quickly and was unlikely to be realized by the end of the Shifting Gears timeframe. And indeed, state leaders began implementing the innovative strategies primarily in the last 18 months of the initiative. Some states adopted and pursued multiple approaches to better serve low-skilled adult learners. *But primary focus was given to improving transitions from adult basic education programs into college-level workforce programs at community and technical colleges.*

MINNESOTA



Jane Onyinge

“I am very grateful to have found the Healthcare Pathways Program. I hope many more people can use it to help their careers.”

Jane Onyinge was born and raised in Kenya and immigrated to the United States in 2009 to seek a better life for her family. Her experience caring for her elderly grandfather inspired her to work in the healthcare field, but she soon found that obtaining a nursing position in the United States would require technical training. After working at a series of temporary jobs, Jane eventually applied for assistance from the state. A counselor at the Minnesota Family Investment Program, the state’s welfare reform program, referred her to the Healthcare Pathways Program, designed to help participants establish careers as a Certified Nursing Assistant (CNA).

In January 2012, Jane enrolled in the program, which begins with 100 hours of adult basic education training in medical terminology, computer, writing and research skills. Meanwhile, she worked towards obtaining her GED and completed behind the wheel training to obtain her driver’s license. After completing the first phase of the program, Jane transitioned to classes at Anoka Technical and Anoka Ramsey Community Colleges, which provided the college credits necessary to obtain her CNA certification. The program also included services from the local WorkForce Center to help Jane and translate her education into employment – job search workshops, employer networking services and support from career counselors.

Jane, 30, passed the state CNA exam in June 2012, and began working as a nursing assistant, primarily providing care to elderly patients. Her new career has greatly helped Jane and her husband support their two young children. She has also gained confidence about her ability to do college-level work and she plans to return to school in a few years to become a Licensed Practical Nurse. Jane says, “I am very grateful to have found the Healthcare Pathways Program. I hope many more people can use it to help their careers.”

Shifting Gears

Results

This program specifically focuses on innovative strategies that connected a state’s adult basic education system with its community and technical college system. It purposely examines the extent to which the six Shifting Gears states gained “traction on the ground” by incorporating these innovative strategies into existing programs. Gaining this traction among adult basic education providers and community and technical colleges signals that states may be on a positive trajectory toward systems change.

States’ Progress

By the end of the five-year period, four of the six Shifting Gears states had implemented innovative strategies to serve low-skilled adults. Illinois, Indiana, Minnesota, and Wisconsin succeeded in enrolling a total of about 4,000 low-skilled adults in their innovative programs—a modest number that is expected to grow considerably during the next several years as these strategies and program are embraced by more organizations within the states.

Each of the four states Shifting Gears teams pursued a “career pathway framework,” creating new programs to help low-skilled adults transition from adult basic education to community and technical colleges and gain credentials with economic value.

The state teams stopped using Joyce resources to finance local projects at the start of Phase Two. Instead, they financed local program development and implementation by leveraging state dollars, encouraging use of traditional funding streams and engaging other stakeholders within state government and in the community (e.g., local philanthropy, community non-profits). These funding strategies have moved the Shifting Gears initiative beyond a “boutique” effort and closer to the desired goal of systems change.

While “traction on the ground” is the primary indicator of Shifting Gears progress, there are other positive outcomes across the six states that warrant attention:

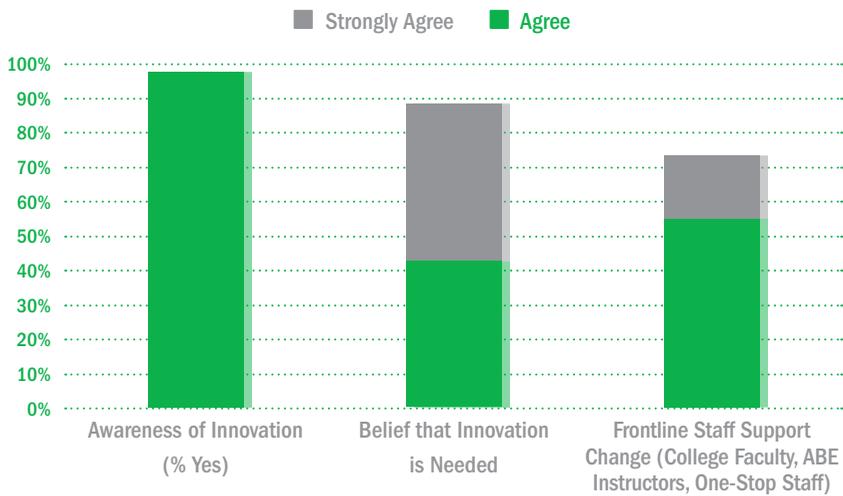
- 1 Although Michigan and Ohio did not achieve the outcomes recorded by the other four states, their work did produce some benefits. Efforts in both states increased awareness among state and local policy makers of the need to improve the education and skill levels of adult workers. This awareness has translated into local efforts to improve connections and transitions between adult basic education and community colleges, and in some cases, with workforce development systems. This greater collaboration among local administrators of these systems is by itself a desirable outcome.
- 2 All six state teams gained a greater appreciation and understanding of the role data plays in supporting program improvement. Key state policy makers now understand the importance as well as the challenges in collecting and analyzing data on transitions between adult basic education, workforce development programs and community and technical college systems.
- 3 Compared to community college and workforce systems, the state adult basic education directors and program operators demonstrated the greatest willingness to pursue systems change. The idea that adult basic education should help their students aspire for higher levels of education and employment, particularly a postsecondary credential, is now firmly implanted among state staff and an increasing number of local practitioners. *This represents a significant change from the outset of Shifting Gears.*

The Shifting Gears work in the six states has been consequential, touching a number of institutions and practitioners, especially in Illinois, Indiana, Minnesota, and Wisconsin. Although the number of low-skilled adults being served through these innovative strategies is modest, these four states appear to be building a foundation for systems change and, after five years, have demonstrated a positive trajectory toward this longer-term goal. The continued work of these states over the next several years will show how much further they can advance their systems change efforts.

Generating Support for Systems Change

In January 2012, the Shifting Gears evaluation team administered an electronic survey to local adult basic education, workforce development, and community college leaders and practitioners in Illinois, Minnesota, and Wisconsin. They sought to measure awareness of and support for the new way of serving low-skilled adults. The results suggest that in these three states there is widespread awareness of the specific innovative strategy, and a belief among local providers that systems change is needed. Particularly noteworthy is that change is supported by frontline staff responsible for putting innovation into practice. The evaluation team found similar sentiments in Indiana among focus group participants representing the three systems.

Level of Awareness of and Support for Innovative Strategy among Local Providers



Affecting the National Discussion

The Joyce Foundation envisioned that participating state policy makers would be recognized as national leaders for their systems change work. Throughout the initiative, state leaders shared their experience with key national stakeholders, policymakers and other experts via public reports, updates on the Shifting Gears website, semi-annual cross-state meetings and special forums conducted in Washington D.C. Additionally, Shifting Gears participants, both on the regional and state levels, have participated in numerous national forums and meetings to share experiences and expertise fostered by their work.

Based on documentation of Shifting Gears activities in notable publications, as well as interviews with senior staff of the U.S. Department of Education, U.S. Department of Health and Human Services, the Bill and Melinda Gates Foundation and the National Governors' Association, it is clear that lessons learned and outcomes from the Shifting Gears initiative has provided valuable insight to national leaders in the field. As Shifting Gears' work continues in participating states, there is every reason to expect that more opportunities will emerge to share the Shifting Gears' experience and affect the national discussion on the need for systems change.

Innovative Strategies Successfully Adopted and Implemented by Shifting Gears States

Illinois: Adult basic education bridge that integrates and connects basic academic skills with postsecondary occupational education in key industry sectors, and involves customized instruction, career development and student transition services.

Indiana: A career pathway strategy, known as WorkINdiana, which provides adult basic education students with access to targeted pre-postsecondary occupational training. It leads to certifications valued in the state's labor market and that, in many instances, can be applied for credit at Ivy Tech, Indiana's statewide community college.

Minnesota: A bridge and career pathway initiative, known as Minnesota FastTRAC Adult Career Pathway, which begins with adult basic education programming at the lowest levels of literacy and extends through community college programming comprised of occupational credit-based course work.

Wisconsin: Career pathway and bridges program, known as RISE (Regional Industry Skills Education) which integrates and connects basic academic skills and technical college occupation instruction for adult basic education participants whose basic skills are insufficient for technical college credit courses.

State Innovations and Implementation Progress (2010-2011)

The following table reports the number of new programs that were implemented for each state's specific innovative strategy during the second phase of Shifting Gears. It does not include demonstration projects that were supported in the initiative's earlier years. Furthermore, the table only includes programs officially identified by the state.

Completion rates for these programs cannot be calculated at this time, because some program participants are still enrolled and timely data on participant status are not available.

State	Innovative Strategy	Number of Programs Operational by Dec 2011 ¹	Number of Participants	Number of Completers	System Penetration: Proportion of System with Innovation
Illinois	Adult basic education bridges	23	1,715	766	17 of 39 Adult Basic Education State Area Planning Councils
Indiana	WorkIndiana (Career Certification Program)	43	255	62 (45) ²	11 of 11 Economic Growth Regions
Minnesota	FastTRAC Adult Career Pathway and Bridges	17 ³	1,074 (517) ⁴	759 (375) ⁵	15 of 25 Community and Technical Colleges
Wisconsin	RISE Career Pathway Bridges	39	956 ⁶	648	14 of 16 Technical Colleges

Source: Data Templates Completed by States

¹ To be included, programs must have served participants and been identified by the state as an official program. Thus, in some instances, the table lists a lower number of programs, for example bridge programs in Illinois, than reported elsewhere.

² Of 62 Indiana program completers, 45 had earned a credential.

³ The number of Minnesota programs includes only those with both Bridge II and Integrated Instruction; the FastTRAC Adult Career Pathway Adult Career Pathways model also includes Pre-Bridge and Bridge I programs that are not reflected in this number.

⁴ Minnesota Bridge II participants exceeded 1,000, of which 517 also participated in the Integrated Instruction Program.

⁵ Of 1,074 Minnesota Bridge II participants, 759 completed that program. Meanwhile, 375 of 517 participants completed the Integrated Instruction Program

⁶ Wisconsin participant count reflects the number of Career Pathway Bridges operating during Shifting Gears; some bridge programs were already operating prior to the initiative.

WISCONSIN



Lisa Hollman & Amy Lemkuil

“I would definitely recommend that other teachers and administrators consider this kind of program. It has been one of the most rewarding things I’ve ever taught.”

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Lisa Hollman and Amy Lemkuil are teachers at Madison Area Technical College. Amy has taught Health Science courses in a traditional classroom setting, while Lisa’s focus is in adult basic and developmental education. Both have spent years working with non-traditional students, including dislocated workers, and have seen first-hand the challenges individuals can face when returning for education.

In order to apply for healthcare degree and certification programs at the college, students first need to complete science prerequisite courses that require certain scores for admission on reading, writing and math tests. Historically, many low-skilled adult workers interested in entering healthcare occupations are unable to achieve these scores. Lisa and Amy responded to this issue by developing a Patient Care Pathway Program designed specifically for these workers.

The Pathway program begins with instruction on postsecondary education basics, such as career counseling and financial aid advice. The next step consists of preparatory classes designed to teach reading, writing and math skills, as well as soft skills such as time management, organization and test-taking. As Lisa says, “These students are capable and intelligent; they just never learned how to be good students. We’re teaching them to think about how to think, learn how to learn.”

The classes are co-taught by Lisa and Amy so that the content used to teach these skills is the same that students will be exposed to in their science prerequisites. For example, they use textbooks from the science courses to teach reading skills. When the students move on to take their science courses, Lisa and Amy continue to co-teach the classes in order to provide soft skills support throughout the process.

The college has seen incredible success from Pathway program. So much so that the U.S. Department of Human Services has provided a grant to study the program as part of its Innovative Strategies for Increasing Self-Sufficiency project. Amy says, “I receive so many emails from my past students saying, ‘I’m employed! I’m doing something I love!’ And these are people who previously wouldn’t even have been able to take the classes.”

The program has expanded to three additional campuses and now includes a second tier of courses in Chemistry for students pursuing more advanced healthcare degrees. Says Lisa, “I would definitely recommend that other teachers and administrators consider this kind of program. It has been one of the most rewarding things I’ve ever taught.”

Opportunities and challenges for future systems change

Lessons Learned

In addition to spurring demonstrable progress towards systems change in four of the six Shifting Gears states, the experience gleaned from the Shifting Gears initiative produced a number of useful takeaways that will help guide future efforts to help more low-skilled workers obtain necessary education and skills. Four of the six core activities of Shifting Gears were effectively used by the state leadership teams to help achieve traction on the ground, while two were not.

The core activities that contributed to states' efforts were:

- 1 Alignment and Collaboration**

States that strengthened alignment and collaboration across the adult basic education, workforce development and community and technical college systems were able to lay the foundation for systems change. Efforts around alignment and collaboration were especially critical for adult basic education, as it elevated its importance as an on-ramp for community and technical colleges.
- 2 State Leadership and Commitment**

States were more likely to make progress with the expressed buy-in and commitment of senior leadership, including the chancellor of the community and technical college system, the secretary of the workforce development agency, and, in some cases, the governor's office. Most commonly, senior leaders demonstrated that Shifting Gears was one of their priorities by speaking publicly and with targeted stakeholders about the need for systems change and by allocating resources to support their specific innovative strategy.
- 3 Policy Change**

Policy change played a key role in helping state leaders establish the foundation and impetus to pursue systems change. Successful states implemented innovative strategies to reform current operations and practices within and across adult basic education, workforce, and community and technical college systems. Changes to specific state policies that affected local programs spurred "local champions" to pursue innovation. Of particular importance, innovative strategies were codified into current regulatory and administrative rules and articulated as priorities in strategic plans issued by state agencies.
- 4 Outreach to the Field and Other Stakeholders**

Engaging professionals within the three systems at the local level helped build local champions for systems change. These champions, if effectively utilized in the future, could translate their enthusiasm to their colleagues and other local providers throughout the system. The initial investments that states made in pilot projects generated important local buy-in for systems change. Also contributing to local buy-in were regular statewide gatherings of key stakeholder groups.

Two of the six core activities were not implemented by the states to a sufficient extent, and thus did not contribute to their success:

5 Use of data to inform and guide the work

Shifting Gears state teams failed to draw on data to promote implementation of innovative strategies. Not only did they face infrastructure challenges, but also they were limited by their analytic capacity and inexperience with constructively framing data results in ways that would garner support for their specific innovative strategy.

6 Engaging multiple communications channels to build awareness and support

Shifting Gears state teams did not fully implement their strategic communications plans for two key reasons. First, they did not engage state-level communications expertise or even expertise within their own agency. Second, the cross-agency teams lacked internal capacity to execute a communications plan in support of their systems change agenda.

There are two important reasons why four of the Shifting Gears state teams succeeded in their efforts to create traction on the ground while Michigan and Ohio did not.

First, five of the six Shifting Gears states—Illinois, Indiana, Michigan, Minnesota and Wisconsin—were able to agree on a clear vision for addressing the needs of low-skilled adults and identify a *specific innovative strategy* to help achieve that vision. The mantra for determining work activities became, “only do it if it contributes or leads to systems change.” Ohio experienced project leadership changes throughout the initiative, which contributed to its inability to agree on a clear vision and specific strategy.

Focusing on a specific innovative strategy provided several key benefits:

- 1 It helped state agencies to reach consensus that low-skilled adults should and could be better served through a new approach to education and skills development;**
- 2 It gave direction and structure to work plans and activities undertaken by each state’s cross-agency team;**
- 3 It helped to garner support of key stakeholders who would be essential for achieving implementation on the ground.**

Second, leaders in four states—Illinois, Indiana, Minnesota, and Wisconsin—were able to adopt key provisions of their policy agenda, enabling the development and adoption of their innovative strategies. On the other hand, the Michigan Shifting Gears team led by the state’s senior workforce leader asked the legislature to enact several major policy changes, but was ultimately unsuccessful in persuading lawmakers to adopt these measures. Once the Michigan team decided to pursue available administrative options for change, state leadership changed and new priorities for education and skills development emerged.

Challenges for achieving scale and sustainability

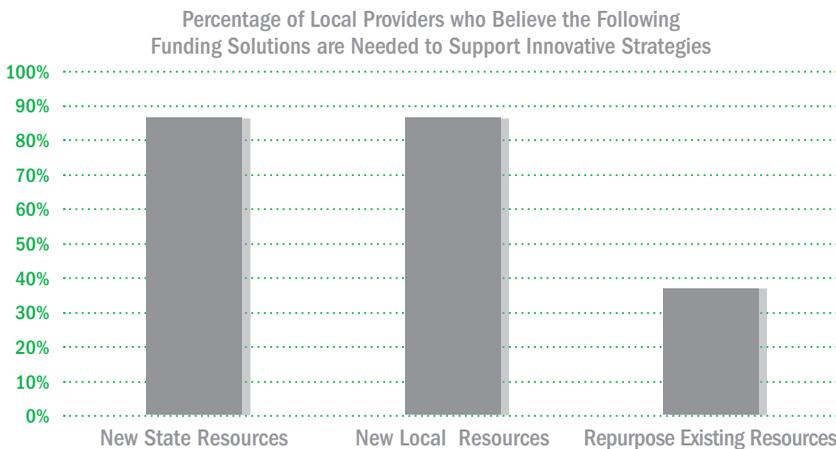
The strategies and policy changes adopted by four of the six Shifting Gears states, however promising, have thus far only touched a modest number of low-skilled adults. These state leadership teams now face the task of expanding the adoption of their innovative programs throughout each state's adult basic education and community and technical college systems, while ensuring their long-term sustainability. State teams confront four main challenges as they seek to scale up their innovative strategies.

Define what it means to scale innovation. A basic step toward defining desired scale is to determine the number of low-skilled adults that could benefit from the new way of providing education and skills development services and to set numerical goals for reaching them.

Instigate cultural change among institutional leaders, faculty, and other frontline staff across the state. This challenge includes identifying the right levers to build support of the innovative strategies by particular groups. Culture change may require different strategies for different stakeholders and could hinge on who is delivering the message and/or demonstrating effectiveness.

Expand the capacity to more effectively use data and produce evidence to demonstrate that the innovative strategies are successful. It will be important for states to conduct rigorous analyses that provide credible findings demonstrating that the new way of serving low-skilled adults is superior to the status quo. Moreover, these analyses should be widely disseminated throughout the field of practice.

Repurpose or reallocate existing financial resources to support innovative strategies. State leaders must find a sustainable way to finance both the development and operation of their innovative strategies throughout the adult education, workforce and community and technical college systems. Responses from survey and focus group participants clearly indicate a hope that new funds will become available, but in an era of shrinking state budgets, repurposing existing funds is fundamental to achieving systems change.



ILLINOIS



Joel Perez

“This past year and this program have changed my life forever.”

Joel Perez went down the wrong path in life as a young man and was ultimately arrested and charged with a felony. With two young daughters to support, Joel made the decision two years ago that he would turn his life around. Due to his past mistakes and failure to complete high school, Joel was unable to find work that provided a sustainable wage. Instead, he worked long hours at a series of low-paying jobs.

Believing that obtaining a GED certificate would be the first step towards improving his circumstances, Joel enrolled in a program to prepare him for the examination. It was there that he learned about an Illinois Career Advancement Pathways (I-CAPS) program at Elgin Community College that would lead to certification for manufacturing work as a Computer Numerical Control (CNC) machine operator.

Joel enrolled in the CNC program in January 2012, and his success came early. Even before completing the program, he was able to obtain a part-time job as a CNC setup operator with a local machine shop. He was in the process of interviewing for a full-time position with another machining company, but a background check revealed his felony charge. While it was the company’s policy not to hire applicants with a criminal background, Joel’s references from the I-CAPS program and his part-time job were so strong that they offered him the position anyway.

Joel, 24, continued to succeed at both of his jobs, obtained his GED and completed the I-CAPS program in December 2012. He has long-term plans to continue his education in his field by obtaining an additional certification and an associate degree, which would allow him to advance to a new career designing the machines he currently operates.

As he looks back at all he has accomplished thus far, Joel says, “This past year and this program have changed my life forever.”

We encourage you to share this report with partners in your field – practitioners, policymakers, lawmakers, researchers, scholars, the media and others. The results of Shifting Gears clearly demonstrate that there is strong potential to foster innovative systems change to ensure that our nation’s workforce is well equipped for the 21st century economy.

More information about Shifting Gears and a PDF of this program synopsis are available at www.joycefdn.org/shifting-gears.

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ⁱ Anthony P. Carnevale, Stephen J. Rose, and Ban Cheah. *The College Payoff: Education, Occupations and Lifetime Earnings*. Washington, DC: The Georgetown University Center on Education and the Workforce, 2011.

ⁱⁱ Anthony P. Carnevale, Stephen J. Rose, and Andrew R. Hanson. *Certificates; Gateway to Gainful Employment and College Degrees*. Washington, DC: The Georgetown University Center on Education and the Workforce, 2012.

ⁱⁱⁱ Bureau of Labor Statistics, Current Population Survey. Washington, DC. Accessed June 26, 2012 from http://www.bls.gov/emp/ep_chart_001.htm.

^{iv} Carnevale, Rose, and Cheah, op. cit., 2011.

^v Bureau of Labor Statistics. *Occupational Outlook Quarterly*. Washington, DC: Winter 2011-12. Accessed June 26, 2012 from <http://www.bls.gov/opub/ooq/2011/winter/art02.pdf>.

^{vi} For a more detailed explanation of this approach and framework, see Derek Price and Brandon Roberts. *The Shifting Gears Approach to Systems Change*. Chicago: Joyce Foundation, December 2009.



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