

# 51 South Bay Consortium for Adult Education

## Plans & Goals - Consortium Approved

### Executive Summary

The SBCE's 19-20 Annual Plan targets goals developed over four years ago and updated with each annual plan. The operational principles in our Charter, adopted by all member Boards in 2014, still hold true: ●focus on the needs of adult education students first ●work with transparency and inclusion with all stakeholders ●embrace collaboration and partnership to have a positive collective impact on our region ●explore expansion and innovation in adult education services in the region ●seek other community partnerships and connections to leverage resources and achieve better outcomes ●commit to ideas, decisions and practices that anticipate the future needs for adult learners in our region. The executive summary of the 2019-2022 Regional Plan restates our mission "...to deliver innovative student-centered programs designed with human-centered values, and realize an effective, more easily navigable system, where there are safe and supportive spaces, and where there is literally no wrong door." Recent "wins" that help chart our direction forward include: a Transition Specialists network building a system of warm hand-offs; a pilot focusing on the specific support needs of immigrants; closer working relationships with community partners to access more resources; a unique data system to identify individual student goals and needs; curricular articulation among members; co-location of college CTE credit courses on adult school sites; an adults with disabilities specialist serving the consortium; a consultation council, and assuring dual-system representation through in all organizational levels. Our annual plan for 19-20 aligns to the Three Year Regional Plan, approved in June. The seven areas of focus of the Regional Plan are all addressed in Project Workplans of this Annual Plan. Logic models, developed for each focus area, helped prioritize objectives in the workplans. The Annual Plan lists objectives, activities, and indicators as follows:

**GOAL 1: Organizational Structure.** Regular collaborative planning and decision-making, with all stakeholders, to direct the plan's effective implementation. Communicate more effectively among all our stakeholders, with regular newsletters and updated websites. Assign responsibilities to drive the plan's strategies and carry out consortium-wide functions and activities.

**GOAL 2: Data and Accountability.** Conduct regular data review sessions to assess progress and effectiveness. Establish a community of practice for members' staff with data collection responsibilities. Continue our experiment with third party software to increase student supports.

**GOAL 3: Program.** Expand articulation agreements among members to achieve greater alignment. Align ASE graduation requirements among all adult schools. Develop new program models to accelerate students' progress (shorter term workshops, contextualized basic education, closer alignment of basic skills programs to career education options). Develop programs responsive to the unique needs of our special populations; reentry from the criminal justice system, adults with disabilities, immigrants, parents, and the youth who have recently left secondary education.

**GOAL 4: Transitions.** Develop a comprehensive framework for student advisement and supports, identifying what kinds of services students receive at what points in their progress through programs. Use the framework to assure equitable access of supports, and identify when additional resources are needed. Identify specific supports for students' transitions to post-secondary education, career-training and employment and greater community engagement.

**GOAL 5: Partnerships and Outreach.** Expand community outreach efforts. Share responsibility to develop stronger community connections. Continue and expand the community connections Pilot. Develop Immigrant Integration Toolkit. Develop marketing materials and outreach strategies to underserved communities.

**GOAL 6: Supportive Services and Resources.** Finding solutions to the childcare needs of students.

**GOAL 7: Professional Development.** Establish annual calendar of scheduled PD opportunities, responsive to what our faculty leaders and Steering Committee identify, including sharing the promising practices already happening among members. Explore developing our own Designated Subject Adult Education Credential program. Include Human Centered Design practices in PD plans. All practices, including reporting on progress of the annual plan's projected activities, are tied to allocations. As a consortium we are maturing in our agreements on definitions of effectiveness, as we look at program outcomes data, and fiscal accounting, more closely and regularly. In the last year we have more closely reviewed CAEP allocations, and will continue to do so, with the additional goal this year of determining whether our current fiscal structures and allocations can sustain these very ambitious consortium goals going forward.

### Regional Planning Overview

The timing of the development and approval of this 19-20 Annual Plan was almost concurrent with the Three Year Regional planning process. The response to the following section, how we determine regional needs, and how we are positioning

ourselves best to respond to them, is largely a report on what the Three Regional Planning process was, what actions we took, what conclusions we came to, and how we decided what outcomes would indicate progress. Each of our annual plans has been aligned to the respective Three Year Regional plan. We regularly reviewed progress with our faculty workgroups and our Steering Committee, and were explicit about how the activities of each annual plan were responsive to the goals of the Three Year Regional Plan. Producing the Logic Models for the 19-22 Regional Plan process was even more helpful. The Logic Models developed for each of the seven goal areas of the 19-22 Regional Plan identified resources, responsibilities, next steps, and indicators of progress. The section on Indicators of Progress asked us to attach outcomes to a timeline. This focused this year's annual planning process even more explicitly on what can reasonably happen in this next year, and what things need to be addressed first in order to achieve the longer-range goals of the Three Year Regional Plan. That framing helped us decide on what objectives/activities would be targeted for 2019-2020, and what indicators would be used to measure progress. For the last four years our consortium's annual plan has been documented in two parallel forms. We write responses to the prompts in the State's annual plan template. Those responses are always aligned to the goals of the Three Year Regional Plan. A second process, not submitted to the state, has also produced "Project Workplans" which list, with much more detail, exactly what activities we will undertake throughout the year. These workplans, developed with consortium faculty and community partners, have been much more concrete about what we plan to do re: professional development, accelerating student learning, filling gaps, student services, program development, and community connections. The Project Workplans have been living documents, sometimes modified through the year as we learn more. Reviewing progress on the activities of each workplan has been our roadmap and compass: where are we now, and where do we still need to go. This year we again developed Project Workplans for FY19-20, with broad participation and input from faculty and staff in the consortium and community partners in our region. Fourteen Project Workplans address the seven goal areas of the Three Year Regional Plan. We have added new formatting to the Project Workplans which align all listed strategies with specific sections in the Three Year Regional Plan. We also have added a list of specific indicators attached to each of the Workplans' activities. Both of these new elements will improve our ability to be accountable to the successful implementation of the 19-22 Three Year Regional Plan. The Project Workplans will, of course, largely inform the consortium member work plans and budgets that will be submitted to the CAEP office by the end of September, 2019. Last, the second Project Workplan for 19-20 is solely about the collection, reporting, and use of data. In our Regional Planning process this emerged as a critical area of growth. The use of data to determine our progress was identified as both a regional need in itself, and a critical step better defining and measuring effectiveness (see next section). Our consortium has been innovative and successful in much of what we have planned to do, but how data is produced and how it informs further planning has not been our strength. In the 19-20 year we will aggregate and review qualitative and quantitative data in a much more regular, focused and explicit way. The next 20-21 Annual Plan, further implementing the 19-22 Three Year Regional Plan, will be strongly informed by what reviews of this year's data tell us.

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## Meeting Regional Needs

### Regional Need #1

#### Gaps in Service / Regional Needs

It's a difficult exercise to prioritize a single regional need over others. A priority might simply be more funding. The region needs a better-funded, more robust, connected, "no wrong door" adult education system. The region needs a system with clearly designed and identified guided pathways for adult learners, with integrated basic skills programs that bridge from level to level, with students receiving individualized guidance and supports that acknowledge unique needs (like immigrant integration). The region needs a collaborative impact system with services and supports that help adult students persist and accelerate toward their goals. Among all those elements, what can be prioritized above others and what is not dependent on all part of the system being more effective? Through the recent process of developing the 19-22 Three Year Regional Plan, consortium member providers (admin, faculty, and staff), students, and community partners and stakeholders, again validated the goal of achieving and improving all of these elements of a No Wrong Door. This coherent and connected system still remains our vision of what the region needs. Our Regional and Annual plans present strategies intended to achieve that vision. But what our regional reality tells us is that we need, with our community partners and government entities, to do much more to look at all possible indicators of progress. We have determined that our plans, adult education's responses to our region's social and economic needs, our human-centered design values – will have a more authentic impact if we do more to measure what's working, what's moving the needle. The Regional need is to use data (big and small, quantitative and qualitative), from multiple sources, to define effectiveness, and so to evaluate what works for adult education students.

### **How do you know? What resources did you use to identify these gaps?**

The process of developing the 19-22 Three Year Regional Plan involved over a year of surveys, focus groups, data collection and analyses. Participation was broad – faculty, students, staff, regional social service providers, city and county government, the workforce development boards, and other community partners. Quantitative and qualitative data were produced and presented to these participant groups multiple times. Quantitative data was generated from multiple regional demographic/employment data sources. Student participant data, demographics and outcomes, were generated from the adult ed and college data systems. Consortium members looked collaboratively, and more closely, at these student outcomes data than in the previous four years. We used a unique practice, borrowed from ethnographical research methodology. We gathered information about needs and gaps from participant and stakeholder groups, fed the raw data back to those same stakeholders and participant groups to aggregate themes and suggest strategies to effectively address those needs and gaps. Faculty, students, and community partners were involved at multiple stages in determining what the goals, objectives, strategies, and progress indicators should be in the Three Year Regional Plan. Further, after organizing the findings in seven goal areas, we produced a “Logic Model” for each of the goal areas of the Regional Plan. The Logic Models helped identify what strategies should be first, or prioritized, and so informed this 19-20 Annual Plan. The Logic Models also asked us to identify progress indicators. Looking at the data, developing the logic models with a focus on what indicators would determine progress, we affirmed that collecting and reviewing data and progress indicators was foundational to everything we were proposing. In summary, it was the process of planning itself, the data gathering and self-evaluation for both the Three Year and Annual Plans, that pointed us to this regional priority. We need to answer the question, how will we know our system improvements are effective? Data and indicators need to be produced and reviewed regularly. Regular review of good data, consistently captured and reported from our student information systems, is critical. But more data from all the sources we accessed in this past year are needed. Quantitative data from county systems and qualitative data from our community partners need to be added to our definitions of consortium effectiveness.

### **How will you measure effectiveness / progress towards meeting this need?**

As described in the prior section of this executive summary, defining effectiveness by using data to measure progress, is exactly the priority for this year. Aggregating data, as currently defined in the systems – looking at NRS/WIOA outcomes; other outcomes relative to prepping students for accelerated success (as encouraged by the AB705 reforms); regional workforce goals (as identified by the two Workforce Development Boards in our region) - these are the data points we will use more regularly to determine our programs’ successes. Measuring effectiveness in these ways requires data systems and practices to change. Our multiple data systems (local SIS, TopsPRO, MIS) need to somehow connect. Data we collect may need to connect with other data systems. The State’s launchboard will show progress as tracked in the EDD data systems. But there may be other systems to connect with as well. The consortium-wide use of the CommunityPro software system may potentially connect with community partners’ data, and capture outcomes uncharted by the adult education SIS. Achievement of these ambitions to use more data to assess effectiveness will be challenging, as we deal with confidentiality, the reticence of our immigrant students to have any of their data shared in the current environment, and the architecture of the many data systems themselves. Through these past few years we’ve also seen there are qualitative data that are uncollected, under-reported, and certainly under-utilized. Surveys, interviews and focus groups are useful every year, not just for a regional planning process. Inquiry built on human-centered design principles will give us information on what’s effective. Our local focus on immigrant integration has suggested a whole new set of indicators on student progress. Those indicators can only be measured if we continue our effort to build stronger relationships with our community partners – through our “immigrant integration pilots” we have begun to have reciprocal data sharing agreements with community partners. At the risk of sounding tautological, we will know we’ve responded to this overarching regional need, to look at data to determine what’s having a positive impact, by actually using data. We will regularly review the data and progress indicators for all seven of our goal areas in the annual plan to assess what’s done, what’s left undone, and what to do next.

## **Gaps In Service**

### **New Strategies**

#### **Strategy #1**

Format note: Strategies presented in the following sections are numbered per the SBCE's 19-20 Annual Plan workplans. Workplans address the seven goal areas of the 19-22 Three Year Regional Plan with specific strategies for the 19-20 year. Each workplan specifies alignment of each strategy to a part of the Regional Plan, persons responsible, and progress indicators and outcomes. The workplans are posted on sbcae.org.

Strategy 3. C. 3 Develop Integrated Educational Training programs aligned to regional pathways. The Regional and Annual planning process identified remaining gaps between our basic skills courses and credit/certificate awarding CTE programs. Our consortium knows the benefit of integrating basic skills in career training contexts to bridge those gaps. We know this, not just from the research and other models that have identified as successful (e.g. IBEST), but also from our own experience. We have offered co-located classes (college credit CTE courses on an adult school campus), where the CTE instruction is augmented by the support basic skills teacher, either during core instruction or in supplemental sessions and individual meeting times. We developed several "Bridge" programs, that were non-credit CTE pathway introductory courses for basic skills students. The curricula of these Bridge courses were developed jointly by adult school basic skills teacher and college CTE teachers. In the past year we set as a goal, without success, to develop and deliver Integrated Educational Training courses under the guidance and parameters of the WIOA Title II 243 program. The strategy this year is to continue that effort and to have successfully designed and delivered IET by the end of the year. The workplan for this strategy is to inventory current IET programs (broadly defined) in the consortium. That mapping will assess the alignment to our two local workforce development boards' priority industry sectors. Additional assessment will measure alignment to Strong Workforce and other regional CTE initiatives, including current and emerging Pre-Apprenticeship programs. That gap analysis, combined with student interest assessments, will suggest CTE areas and regional pathways that need IET programs. An additional process of assessing organizational capacity to develop additional/new IET and Bridge programs will inform recommendations to SBCE Steering Committee made in fall. As resources are identified for the IET development, the recommendations will consider flexible schedule learning opportunities, distance or blended learning. As staff is assigned to program/curriculum development, IET will be aligned to identified Regional Pathways. As programs are developed they will be submitted for approval by state, and WIOA qualified. Related ESL programs, IELCE, will be developed including IELCE COAPPs developed by the consortium's faculty workgroups. Part of the workplan is to conduct program evaluation of existing programs, with both quantitative and qualitative data, to document current outcomes. This model process of evaluation is aligned to our overarching priority this year (see the Regional Need in this annual plan's Executive Summary) as well as build capacity to embed real time and historical outcomes assessment in the new IET programs developed this year. The workplan for this strategy also includes identifying student success stories as a part of a new marketing and outreach effort to recruit students.

Other Strategies in the SBCE 19-20 Annual Plan related to Gaps in Services:

- 1.6 Add "community partner" meetings to annual calendar, distinguished from Public Governance meetings, to review regional data together and identify gaps in services with community partners.
- 3A.5 The ESL workgroup will inventory current IET, WIOA 243 programs in the consortium to identify best practices, and curriculum development, for additional IET programs.
- 3B.4 Map CTE offerings across consortium members and maintain current info on consortium's Open Doors website.
- 3B.9 Build stronger alignment to regional pre-apprenticeship programs.
- 3C.1 Conduct assets mapping and gap analysis for Integrated Educational Training programs in the consortium.
- 3C.4 Establish a program evaluation process for consortium programs; identify progress indicators.
- 3F.1 Inventory existing programs and services for parents (adult supporting K-12 success) within the consortium and the community.
- 3F.6 Map out existing Early Childhood Education pathways within the consortium, identifying missing linkages.

## Seamless Transitions

### New Strategies

#### Strategy #1

Strategy 4.1 Develop a Comprehensive Framework for SBCE Transitions and Support Programs In the past four years our consortium has focused a lot of attention and resources on student counseling, guidance and supports to facilitate transitions from basic skills programs to CTE training, post-secondary education, and work. Our Transition Specialists, positions that were first created after the initial AB86 planning, have been at the forefront of the effort. Transition Specialists from all members have met regularly to share best practices and resources, and to develop "warm handoffs" of students from one system to the other. The consortium has purchased a dedicated software system as a transition planner to help student progress toward goals and make referrals to resources to address their barriers (see the Leveraging Resource section of this

annual plan). Many other strategies have been developed to support more effective transitions among programs: In classroom teaching practices, professional development on student transitions, human-centered design training on journey mapping, capturing student goals and “next steps” in individual educational plans, creating a community resource guide, piloting more formal collaborations with community partners are a few of the ways we’ve attempted to build more capacity to provide individualized supports for students transitioning to their goals. The last two years of our Immigrant Integration project has further developed our understandings of what our students want and need to move forward in their lives. As we reviewed our priorities for the 19-20 Annual Plan we focused on the need to have all these initiatives and resources to promote students’ transitions in a framework that clearly identified how students access supports and guidance at all stages of their journey in adult education. This strategy will clarify our “mission” or guidance for student transitions, focusing on short-term, interim, and long-term outcomes. We will evaluate the activities, individual student planning, responsive services, and system support. The work to create this framework will assure that there is equitable student access to supports, and that culturally-responsive support services are provided. The strong focus on student outcomes, rather than consortium job descriptions, forms, schedules, and protocols, will drive this strategy. The focus will be on what the student receives, and what happens as a result. With this focus the strategy is aligned with the overarching “Regional Need”, as described in this Annual Plan’s Executive Summary, to use data more effectively to measure what is working. Other Strategies in the SBCAE 19-20 Annual Plan related to Seamless Transitions:

- 3A.1 Review and update adult ed/community college ESL alignment chart
- 3A.3 Review ESL intake, assessment and orientation processes at all consortium sites.
- 3B.2 Local employers will be engaged to identify local industry needs exploring the more formal and systemic employment placement for consortium students.
- 3B.5 Explore opportunities for dual enrollment across the systems (basic skills adult ed and CC credit CTE).
- 3B.6 Bridge programs are evaluated, expanded, and marketed more widely to potential students.
- 3D.1 (cont.) Compare consortium adult HS diploma requirements in relationship to all adult secondary ed programs in the region.
- 3D.2 Assess consortium’s basic skills programs alignment to the AB705 and Guided Pathways initiatives in the colleges.
- 3E.1 Add workforce preparation and career exploration modules/strategies specific for adults with disabilities to all programs
- 3E.2 Explore steps needed to offer the National External Diploma Program
- 3E.2 Develop adults with disabilities service learning opportunities with community partners
- 3G.1 Increase services to Custody Alternative Supervisions Unit of the county jail; identify and counsel those who did not finish HSD; connect corrections “leavers” to career planning
- 4.2 Develop common student needs assessment, leading to individual student transition plan.
- 4.3 Strengthen student service infrastructure at colleges to welcome adult education students
- 4.4 Increase connections to workforce development and career opportunities for SBCAE students
- 4.5 Identify possible transition options for students with community goals.

## Student Acceleration

### New Strategies

#### Strategy #1

Strategy 6.2 Select sites to pilot childcare services. Our consortium has prioritized student support services for the last four years. We’ve had success in some areas, and others have been challenging. But without question, as we’ve worked with students (interviews, surveys, focus groups) to determine what barriers need to be addressed, childcare consistently is reported most often. In this regional plan process, and then in the annual plan’s iteration of its goals and strategies, our consortium has determined it can no longer acknowledge this great need and not do something more systemic in response. We see our students who are parents, often economically stressed, struggle to make progress while addressing childcare needs. Providing this support would exponentially accelerate the progress of those students who need it. Some in our adult schools remember when all schools had “babysitting” as some sites, funded by the old, discontinued CBET program. Without that additional resource, adult schools have been challenged to use limited CAEP dollars to provide any kind of care for children while parents study. This year we’ve determined to explore how we might repurpose current resources, leverage other resources from our mother districts or community partners, develop mutually beneficial relationships with Early Childhood Education certificate programs, to offer childcare at two of our sites. Learning how to blend resources, what personnel issues arise, how students are selected and remain, how we measure the success of what we create and deliver, will be a high priority for our consortium this year. Our “logic model” identifies the June, 2020 outcome of students studying and making progress because of the childcare supports. Learning from this pilot will inform our efforts to expand the supports to all adult ed sites in the consortium in years to come.

Other Strategies in the SBCAE 19-20 Annual Plan Strategies related to Student Acceleration:

- 3A.4

The ESL Workgroup will support implementation of the Immigrant Integration Framework•3B.7 Study CTE offerings to determine if more “student friendly” models (bootcamps, online, short term) will increase student participation and persistence. Every student has a career plan.•3D.1 Formalize consistent new (lower) graduation requirements among consortium’s adult schools, with portable credit.•3D.6 Explore alternative and accelerated delivery of basic skills and adult secondary programs (integrated HSE, workshops, bootcamps, online, short-term classes).•3G.2 Offer regular workshops/classes at (corrections) re-entry center. Develop topics from focus groups of students.(See strategies under “leveraging resources”, which describe building stronger connections with community partners so students access supports which could accelerate their progress).

## Professional Development

### New Strategies

#### Strategy #1

Strategy 7.A.2 – Annual PD Plan and CalendarOur Regional and Annual planning processes identified the goal of consortium-wide coordination professional development. There are both many professional development needs and many opportunities. In recent years there has been adult education professional development offered by consortium members, state agencies, professional organizations, community and regional government partners and others. These opportunities have sometimes been missed by conflicting calendars, miscommunication, and lack of resource planning. This strategy seeks to address that by establishing a representative team and coherent process to: 1) assess key professional development needs (for example, through staff surveys and engagement of the program-area faculty workgroups), 2) identify appropriate opportunities aligned to those needs, 3) produce an annual plan for professional development that is calendared with all the other complicated dates/conflicts of seven different districts, 4) post that calendar on the consortium’s website and communicate in a timely and effective way to all consortium members. Other Strategies in the SBCAE SBCAE Annual Plan related to Professional Development•1.7 Produce consortium orientation materials for new hire packets•3E.7 Build capacity of consortium staff to serve adults with disabilities – provide training, teaching strategies and develop and disseminate materials•4.6 Provide professional development from local workforce development board (NOVA) on job-coaching skills, job searching basics for Transition Specialists. “Next level” of human-centered design training for Transition Specialists. •7A.3 Identify and disseminate member best practices consortium wide. •7A.4 Share professional development with community partners and neighboring consortia. •7A.5 Coordinate consortium-wide professional development day/conference. •7B Explore the establishment of an Adult ed credential program in the consortium.

## Leveraging Resources

### New Strategies

#### Strategy #1

5.1/5.2 Continuation and expansion of the community connections/reciprocal referral pilots.From the outset our consortium has acknowledged our region’s need for our programs to intentionally support greater immigrant integration. Each regional and annual plan has named strategies of supporting immigrant integration. In doing this work, we’ve built connections to community partners who share the goals. For the last eighteen months, we’ve undertaken a special project to study how we might identify metrics of immigrant integration, capture them in data systems, and learn how we build capacity so our students achieve more positive outcomes. Central to that project is a pilot in one of our schools to identify key community partners (who have resources we can leverage), create formal memoranda of understandings among them on how referrals are made to them and from them to our programs, and to collect data on student outcomes as a result of those referrals to resources we do not have. The project conducted a “touchpoints” survey of all adult schools in the consortium, identifying where students have “trusted conversations” about their barriers. Those data were reviewed in a consortium-wide professional development day on human-centered design, which then asked all faculty and staff to create “what if” scenarios,

that is, what changes in our operations these student data suggested. The pilot looked at what's happening now inside classrooms (instructional strategies, teacher-student time to identify barriers and make referrals), created a regional community resource directory for referrals, studied the role of Transition Specialists and other staff, and developed the stronger relationships with a select number of community partners. The MOUs outlined how partners would come to campus to provide presentations or individual interviews, and how the school would make formal referrals to the partners for services. Important to the project was to track what actually happened for the students when the referrals were made: did they get to the agency, did they receive the support they needed, did it make a difference? For example, over 400 students at the school expressed interest in learning health care insurance options. After presentations, interviews, and referrals to the community partner, over 50 students actually applied for and received health insurance for their families. The pilot at this one school only scratched the surface in learning how we might have more capacity to make effective student referrals to community partners and capture data on the outcomes. What we've learned so far in the pilot, and what was generated from the "what if" visioning from the human-centered design professional development day, will inform a second stage of the community connections project at the pilot school, and we will expand the pilot to at least one other school. This strategy, building stronger and formalized connections to key community partners, in order to make referrals to needed services and resources, and capturing outcomes of the referrals, is critical to our immigrant integration framework which categorizes needed outcomes in areas like health, economic security, housing, community involvement etc. A significant majority of our students are immigrants, not just in ESL programs, but in basic skills, secondary, and CTE programs. Further, we know that the capacity we build from this strategy will help not only immigrants, but other students how need support to navigate and access the resources available in our region. Other Strategies in the SBCAE 19-20 Annual Plan related to leveraging resources:

- 3A.2 Provide regular updates by college faculty to the faculty workgroups on AB705 implementation at their sites and the impact it has ESL students.
- 3B.3 Conduct outreach to build stronger connections to other CTE providers outside the consortium to facilitate training and job placements.
- 3B.1 Assess SBCAE CTE programs for alignment to Five Industry Sectors prioritized by the two WDBs; Alignment to Strong Workforce and other regional CTE initiatives addressed.
- 3B.8 Improve/simplify navigation to Title I training options.
- 3D.2 Assess consortium's basic skills programs alignment to the AB705 and Guided Pathways initiatives in the colleges.
- 3E.5 Convene regional Adults with Disabilities service providers (AWD Summit)
- 3F.2 Identify opportunities for partnership with K-12 Districts in building programs and services for adults supporting K-12 success
- 3G.4 Participate in Santa Clara County Re-Entry Network
- 3G.5 Conduct joint grant search and applications with local Workforce Development Board (NOVA)
- 4.3 Develop formal strategic relationships with consortium-wide community partners (beyond the pilots described above)
- 4.4 Develop and disseminate a Community Connections Toolkit.

## Fiscal Management

**A narrative justifying how the planned allocations are consistent with the annual adult education plan which is based on your CAEP 3-year plan.**

Central to the current annual and three year regional plans is the goal of increasing our capacity to capture and analyze data and establish practices to review data on student outcomes together (see Regional Need in the Executive Summary). The intent is to learn what is most effectively achieving outcomes for students, and in doing so define program effectiveness. As we agree on the measures of program effectiveness we will be more accountable to each other and to our partners in the region. How funding is used is central to determining consortium-wide and member effectiveness. This year, the legislative cap on indirect funding, resulted in close examination of how consortium member are supported by their districts. We were successful in shifting some "direct" funding to more appropriate support of CAEP programs. The internal dynamic of each member district, with distinct district cultures and practices, may always be a challenge. Adult schools, whose funding sources are limited, and whose employee contract obligations are often tied to elementary and secondary education funding, will struggle, and do not look forward to a possible future recession and reduction in COLA or even in base allocations. Not being able to build a reserve challenges longer term facilities planning. In the colleges, the various reform initiatives (Strong Workforce, AB705, Guided Pathways, Student-Centered Funding Formula) sometimes leave less space for reviewing CAEP's role, and how its funding can leverage other resources for adult education students. Our consortium's initial fiscal structure, from the AB86-AB104 planning period, was founded on the direct-funding model. At that time this assured the desired equity of governance. However, those first allocations were made with certain assumptions about what resource would be used for ongoing direct services to students, and also what resources would be used for new initiative and consortium-wide supports and innovations. One

member, although not a fiscal agent, was allocated funding for consortium-wide purposes (beyond the statutorily limited indirect operational funds). Other members also agreed to fund consortium-wide supports (e.g. contracting with an Adults with Disabilities Specialist to serve the whole consortium, a data specialist for all five adult schools). Our relationship to date at the consortium-wide level has been collegial, and decisions about fiscal allocations have been made with facility. However, at this stage in our consortium's development, and as the broader educational environment alters and becomes more complicated, our governance team will need to review if our current model continues to serve us. Are our consortium-wide purposes sustainably funded? Are there protections in place, more than historical goodwill? Strategies specified in the 19-20 Annual Plan are intended to answer some of these questions. Other Strategies in the SBCAE 19-20 Annual Plan related to fiscal management:

- 1.9 Review Consortium-Wide resource allocation, development, and sustainability
- 2.1 Assess program and agency effectiveness through the regular review of reports of CAEP and annual plan progress indicators.
- 2.4 Collect, report and analyze data (including fiscal) effectively and regularly.

#### **An approach to incorporating remaining carry-over funds from prior year(s) into strategies planned for 2019-20.**

The objectives and strategies listed in the Fiscal Management section describes how we will continue our transparency to each other at the consortium governance level. We will review fiscal expenditures both to track what is remaining and unspent, but to further align expenditures to what our data suggests is effective use of funds. The process to assure all funds are effectively used to support CAEP and WIOA outcomes, consortium-wide functions plans, and implementation of our annual plan, is the same process to assure the appropriate use of any carry-over funds.

## Certification

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