Planning Tool for Building Equitable Pathways

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At a Glance

With this tool, intermediary organizations can gauge their capacity and effectiveness in leading and supporting the creation, improvement, and sustainability of high-quality career pathways for Black and Latinx youth and young people who are experiencing poverty. This tool will allow your organization to plan, partner, and do the work necessary to become a more effective intermediary in your unique context.

Authors

Derek Niño, Associate Director, **JFF**

Kyle Hartung, Associate Vice President, **JFF**

Acknowledgments

About JFF

JFF is a national nonprofit that drives transformation in the American workforce and education systems. For more than 35 years, JFF has led the way in designing innovative and scalable solutions that create access to economic advancement for all. www.jff.org

About Building Equitable Pathways

Building Equitable Pathways is funded by the Bill & Melinda Gates Foundation and aims to provide youth with the information and support they need to make informed choices for their futures—especially young people who historically have been denied access to these key resources. The goal is to dramatically increase the number of young people, ages 14 to 24, who are Black, Latinx, or experiencing poverty, who have the agency, social capital, skills, and credentials needed to thrive in the workforce and in life. A deep commitment to diversity, equity, and inclusion stands at the heart of this initiative. www.jff.org/equitablepathways

Table of Contents

Introduction

Intermediary organizations are critical to offering college and career pathways for young people and supporting economic development at scale. Intermediaries make it possible and sustainable for individual schools and districts to form and maintain relationships with both postsecondary institutions and employers across a region. They can streamline efforts, leverage resources, improve data collection, maximize employer partnerships, and ensure quality and consistency of work-based learning opportunities.

This planning tool is designed for intermediary organizations to gauge their capacity and effectiveness in leading and supporting the creation, improvement, and sustainability of high-quality career pathways for youth who are Black, Latinx, or experiencing poverty. This tool will allow your organization to plan, partner, and do the work necessary to become a more effective intermediary in your unique ecosystem.

This tool was developed as part of the Bill & Melinda Gates Foundation's Building Equitable Pathways initiative. It is based on a set of guiding hypotheses that outline what makes an intermediary effective at facilitating college and career pathways in its ecosystem.

The six guiding hypotheses are:

- **Strong partnership and alignment with local K-12 schools and districts**
- **Strong partnership and alignment with local postsecondary institutions**
- **Articulated paths aligned to local labor market demands**
- **Strong partnership with the local employer community to advance opportunities for work-based learning**
- **Sustainable business model**
- **Policy agenda and supporting strategies**

Using the Planning Tool

This tool should be used by your leadership team. First you will reflect on indicators related to each of the six hypotheses for the creation of high-quality pathways. Then you will consider functions and features that cut across all aspects of your work. These functions and features, and the work necessary to realize them, are critical for your organization to serve as an effective work-based learning intermediary.

The hypotheses and indicators in this tool are rooted in field-proven best practices. It is important to recognize that every organization is on its own journey within its unique ecosystem. There may be indicators that are less relevant to or important within your context. Establishing where your organization's work stands on each indicator can help you to develop an action plan that focuses on the areas that you identify as your strengths, needs, and opportunities for growth.

Considering Where You Are in the Work

Keeping in mind the unique goals, realities, and needs of your organization and ecosystem, reflect on the current level or state of implementation in each hypothesis using the following scale. (Use "Not Present" if the work has not yet begun).

Work related to this condition or activity can be described as:

(1) INITIATING	(2) DEVELOPING	(3) DEMONSTRATING
• Ad hoc or informal • Uncoordinated with and/or loosely connected to other activities • Occurring irregularly or inconsistently • Not operating at scale and/or having narrow or limited impact	• Somewhat formalized • Partially coordinated with and/or connected to other activities • Occurring occasionally or with some regularity • Narrow or limited in scale and/or having an uneven impact	• Formalized or strategic • Highly coordinated with and/or tightly connected to most other activities • Occurring systematically • Operating at scale and with measurable and observable impact

After you reflect on each indicator, you can use the planning questions to develop an action plan that describes how your organization will (1) enhance, expand, and sustain efforts that are currently underway, and (2) initiate or advance efforts that are considered lacking.

Hypothesis 1: Strong Partnership and Alignment with Local K-12 Schools and Districts

Equitable pathways being in the K-12 setting and ensure that career-connected and work-based learning opportunities expose youth to career options that can have a lifetime of impact. Strong partnerships and alignment include work-based learning as a core component of career pathways with solid participation of youth who are Black, Latinx, or experiencing poverty, and no group is over- or underrepresented in a particular program or with a particular employer.

Indicator	Status and Notes: Not Present, Initiating, Developing, Demonstrating
Work-based learning is a core component of career pathways 1. The intermediary ensures that work-based learning is offered by most, if not all, partner schools. 2. Career pathways are of high quality and are promoted to and understood by students and families to the same degree as purely academic options. 3. School-based personnel are responsible for work-based learning opportunities with the intermediary providing guidance and support.	
High school students who are Black, Latinx, or experiencing poverty participate in work-based learning 1. The intermediary and K-12 partner(s) have an intentional plan for recruiting, engaging, and supporting young people who are Black, Latinx, or experiencing poverty in work-based learning opportunities. 2. A clear approach is used to place and support students in work-based learning opportunities that are aligned to their studies, areas of interest, and careers with family-supporting wages. 3. Placement demographics in work-based learning closely reflect those of the ecosystem without under- or overrepresentation of any population in a particular program or with a particular employer.	

There are systems for sharing information and tracking student advising, participation, and progress
1. The intermediary works with K-12 districts and schools to create and utilize an information system that spans the ecosystem and includes employers.
2. The information system increases awareness of work-based learning opportunities and aids in intentional, equitable matching and placement of students.
3. Student advising, participation, and progress are easily tracked.
4. K-12 and employer partners directly work together with guidance and support from the intermediary.

Career pathways integrate rigorous core academics, career-focused learning, and work-based learning
1. The intermediary works with K-12 partners to ensure that career pathways consistently embed rigorous core academics (e.g., honors, AP, IB, dual credit / dual enrollment).
2. K-12 partners provide opportunities for students to take strategic college credit-bearing courses that align with in-demand industries and provide industry-sought credentials.
3. Career pathways are perceived to be as viable and desirable as purely academic pathway options.

Planning Questions

How many K-12 schools and districts does your organization work with? Why did your organization choose to work with those schools and districts?

How does your organization ensure the intentional outreach to and recruitment of youth who are Black, Latinx, or experiencing poverty? How does your organization ensure that opportunities meet the needs of these youth and that pathway enrollment reflects the demographics of the ecosystem?

What information systems are currently in place? How do these information systems encourage communication? How do they help partners prioritize tracking student progress and meeting student needs?

How does your organization ensure that career pathways embed rigorous core academics? How does your organization address misunderstanding and false perceptions of either tracking or "college *or* career pathways" (instead of "college *and* career pathways")?

Hypothesis 2: Strong Partnership and Alignment with Local Postsecondary Institutions

Effective and equitable career pathways start at the secondary level and continue through higher education so that students earn certificates, credentials, and degrees that have value in their local labor market. Intermediaries work with postsecondary institutions to ensure this continuity. Students receive college credit for on-the-job experiences such as internships and apprenticeships. They also receive consistent career advising that aligns with work-based learning opportunities and pathways that they can access in the future. Intermediary and postsecondary partners have an effective plan for recruiting youth who are Black, Latinx, or experiencing poverty for work-based learning opportunities. Placement demographics closely reflect those of the ecosystem, with no group over- or underrepresented in a particular program or with a particular employer.

Indicator	Status and Notes: Not Present, Initiating, Developing, Demonstrating
Postsecondary career pathways align to and are integrated with secondary career pathways 1. Secondary and postsecondary career pathways align and integrate to provide a seamless transition and to improve retention and completion rates. 2. Work-based learning is perceived to be as viable as purely academic learning.	
Postsecondary students who are Black, Latinx, or experiencing poverty access and participate in work-based learning 1. The intermediary and postsecondary partner(s) have an intentional plan for recruiting youth who are Black, Latinx, or experiencing poverty for work-based learning opportunities. 2. A clear approach is used to place and support students in work-based learning opportunities that are aligned to their studies, areas of interest, and careers with family-supporting wages. 3. Placement demographics closely reflect those of the ecosystem without under- or overrepresentation of any population in a particular program or with a particular employer.	

There is a system for career advising and placement
1. Approaches to postsecondary career advising are systematized and include: exploring the roles, responsibilities, and job possibilities within a career field; covering the educational requirements for specific careers; highlighting average earnings and regional employer demand for jobs in a particular field (i.e., labor market information); offering a career interest inventory assessment; and highlighting the importance of soft skills.
2. Career advising occurs consistently and aligns to work-based learning opportunities and pathways that are offered in the ecosystem.
3. Career advising results in work/job placements that are aligned to a student's career plan that is revisited and revised at predefined, regular intervals of time.

Work-based learning opportunities lead to credit, certification, licensure, credentials, and degrees
1. The intermediary works with the postsecondary partner to offer credit, not only for secondary (as dual credit) and postsecondary courses, but for on-the-job experiences such as internships and apprenticeships.
2. Work-based learning opportunities align with and lead to certification, licensure, credentials, and degrees.

Planning Questions

How does your organization ensure that secondary and postsecondary pathways align and are integrated? What are the barriers to and opportunities for alignment and integration?

How does your organization ensure intentional outreach to and recruitment of youth who are Black, Latinx, or experiencing poverty? How is the organization ensuring that opportunities meet the needs of these students and that the resultant pathways reflect the demographics of the ecosystem?

How does your organization work with your postsecondary partner(s) to ensure equitable career advising and placement?

How does your organization work with your postsecondary partner(s) to ensure that work-based learning opportunities lead to credit, certification, licensure, credentials, and degrees?

Hypothesis 3:
Articulated Paths Aligned to Local Labor Market Demands

Intermediaries work with their K-12, postsecondary, and employer partners to align programming with local labor market demand. They use best-in-class, real-time, and traditional labor market information to gain insight into current and future job opportunities. Employers work with instructors to co-design high school and postsecondary programs to ensure that young people gain the skills and knowledge needed to succeed within their respective industries. The intermediary ensures that high school and postsecondary partners crosswalk their programs and codify agreements for articulation, credential granting, and transfer. Data systems track progress and monitor equity of access to in-demand careers for youth who are Black, Latinx, or experiencing poverty.

Indicator	Status and Notes: Not Present, Initiating, Developing, Demonstrating
Career pathways align to local labor market demands 1. Pathways are aligned with high-skill, high-demand, family-supporting jobs and careers in the local labor market. 2. Pathways reflect changes in labor market information based on multiple sources of traditional and real-time data (e.g., U.S. Bureau of Labor Statistics; Burning Glass; Emsi; Help Wanted OnLine; State Departments of Labor and Workforce Development).	
Employers are involved in designing pathways 1. Employers from across the ecosystem are fully engaged in reverse skills-mapping from their respective industries to design secondary and postsecondary programs. 2. The processes and programs offered help young people develop the knowledge and skills necessary for high-skill, high-demand, family-supporting careers in the local labor market.	

Postsecondary and secondary pathways are aligned
1. There is a clear crosswalk between postsecondary programs and secondary programs with bridge, articulation, and transfer agreements.
2. Postsecondary and secondary partners collaborate to design their pathways starting from labor market needs and credentials in high-wage and in-demand industries.
3. Strategies are in place to increase access to equitable career- and work-based learning opportunities for youth who are Black, Latinx, or experiencing poverty.

Partners collaborate to assess and improve career pathways

1. The intermediary and secondary, postsecondary, and employer partners meet regularly to assess and improve career pathways, paying close attention to equity, access, labor market information, and outcomes.
2. There is an agreed upon process and timeline to asses and improve career pathways.

Planning Questions

What is being done to ensure that career pathways align to (1) local labor market demand and (2) high-skill, high-demand, and family-supporting careers?

What does employer involvement in pathways and program development look like?

How does your organization ensure that postsecondary and secondary partners crosswalk their programs in ways that increase access for youth who are Black, Latinx, or experiencing poverty to high-wage, in-demand careers?

What is the process for revisiting and revising career pathways for equity, access, and outcomes? How often does your organization meet with your partners to discuss career pathway improvement?

Hypothesis 4: Strong Partnership and Alignment with Local Employer Community to Advance Opportunities for Work-Based Learning

Partnerships with employers are critical to providing work-based learning opportunities that lead to high-skill, high-demand jobs and family-supporting careers. As a critical partner, employers have an impact on all points along the pathway, from shaping K-12 curricula and course selection to training and then hiring qualified job candidates. The intermediary collaborates with educators to provide high-quality work-based learning experiences that meet both youth and employer needs.

Indicator	Status and Notes: Not Present, Initiating, Developing, Demonstrating
Career pathways meet industry needs and extend learning into the workplace 1. Career pathways course offerings are aligned to industry needs. 2. The vision and responsibility for work-based learning is shared by education and employer partners. 3. Workplace experiences help youth learn critical industry-specific knowledge and skills.	

Youth can access work-based opportunities with welcoming conditions
1. The intermediary works with industry partners to increase the number of employers who offer work-based learning opportunities and to increase the number of available spots for young people with each employer.
2. The intermediary works with employers to increase the number of entry-level positions for pathways students.
3. The intermediary works with employers' HR to support the creation of a welcoming environment for youth who are Black, Latinx, or experiencing poverty.

Youth can access mentoring and training
1. The intermediary works with employers to ensure that mentoring in the workplace is intentional and overseen by a qualified employer representative.
2. Mentors are trained in how to reinforce and extend classroom learning that provides access to industry-valued knowledge and skills.
3. Educators and mentors collaborate and receive training to better understand both youth and employer needs.

There is a clear process for communication among partners
1. An online platform directly links education and employer partners so they can quickly and efficiently share information necessary for work-based learning placements and employer feedback on youth performance and progress.
2. Clear processes and protocols are in place to ensure communication between and among partners.
3. The intermediary supports the development of strategies to communicate the benefits of work-based learning and the variety of opportunities available to youth.
4. The intermediary collects and synthesizes feedback to improve work-based learning experiences for all stakeholders.

Planning Questions

How does your organization ensure that what students learn in the classroom is applied and extended in the workplace?

How does your organization work with employers to increase the number of work-based opportunities they offer to young people? How are youth who are Black, Latinx, or experiencing poverty intentionally recruited for these positions?

Who is responsible for mentoring in the workplace? How does your organization ensure that mentoring is intentional and high quality?

How are placement opportunities communicated? How is feedback used to improve both the youth experience and the overall model?

Hypothesis 5: Sustainable Business Model

To have a lasting impact, an intermediary must be positioned to sustain itself. The intermediary takes advantage of opportunities for public and private grants and contracts but does not rely on them for long-term sustainability. While funding is a major component, sustainability is also the product of effective and efficient use of material resources, human capital, and a business model that includes shared costs and resource needs among partners.

Indicator	Status and Notes: Not Present, Initiating, Developing, Demonstrating
The intermediary effectively leverages opportunities for funding 1. The intermediary leverages the viability, value, and demonstrated success of its model to secure funding and, when possible, share costs with partners. 2. Partners in the ecosystem contribute financial and in-kind resources, either individually or as a coalition. 3. The intermediary has allocated resources and personnel for the purposes of fundraising, providing guidance and support to partners, and for strengthening and promoting the model within and beyond the ecosystem.	
The intermediary plans for effective communication and promotion 1. The intermediary communicates with specific stakeholders to promote its model, sustain current partnerships, and attract new partners. 2. The intermediary has a communications strategy designed to inform and educate different stakeholder groups (e.g., families, young people, community-based organizations, K-12 partners, postsecondary partners, employers, and governmental agencies). 3. The intermediary has a strong and visible presence on the internet and social media in its ecosystem and beyond.	

The intermediary's value-add is clear 1. The intermediary's work is seen as a value-add by key stakeholders and is a central component of the regional pathways ecosystem.	
Partners take a shared responsibility for the work 1. The intermediary assumes responsibility and has a staffing plan for coordinating the work within the ecosystem and supporting partners accordingly. 2. The intermediary provides support and establishes strong convening routines to ensure that partners share the responsibility for completing necessary work. 3. Each partner contributes its expertise and takes full advantage of its position in the pathways ecosystem to recruit, enlist, educate, and support youth who are Black, Latinx, or experiencing poverty.	

Planning Questions

What are the sources of funding for the model? How does your organization ensure the sharing of costs and resources?

What are the mechanisms for reaching stakeholders? How does your organization tailor its messaging to different audiences? How and how often is promotion—word-of-mouth, in-person showcases, social media, etc.—revisited and revised to increase effectiveness?

How does your organization know that it is valued in the ecosystem as an intermediary?

What were/are your organization's plans for shifting responsibility for the work from itself to being shared with its partners? How does your organization ensure the integrity of the model and the creation of equitable pathways across partners?

Hypothesis 6: Policy Agenda and Supporting Strategy

The intermediary recognizes the role that federal, state, and local policies play in shaping the pathways work. At times, policy can be enabling (e.g., federal policy in support of career and technical education, Perkins V) or restricting (e.g., labor laws and institutional policies). Having a clear policy agenda and strategy allows the intermediary to take advantage of existing opportunities to the fullest and, when necessary, help to create new opportunities through advocacy and influence.

Indicator	Status and Notes: Not Present, Initiating, Developing, Demonstrating
The intermediary makes effective use of existing federal, state, and local policies 1. The intermediary's staff has the knowledge and skills to make effective use of existing policies relevant to its role and context. 2. The intermediary leverages existing policy to marshal resources and advance strategic efforts to support the work.	
The intermediary works to close policy gaps through advocacy 1. The intermediary is aware of gaps in existing policies (i.e., what is not included and/or barriers they create), elevates concerns, and proposes solutions with key stakeholders. 2. The intermediary has a strategy to enlist and collaborate with external partners to close policy gaps affecting pathways and work-based learning, especially those that most impact youth who are Black, Latinx, or experiencing poverty.	

The intermediary works to influence the field through policy

1. The intermediary sets agendas based on existing policies, and motivates and coordinates efforts to realize those agendas.
2. The intermediary uses its convening authority and voice to influence the field, mobilize stakeholders and resources, and advocate for the creation of effective policies that address shortcomings and gaps in existing policies.

Planning Questions

What are the federal, state, and local policies that govern or impact your organization's work? What has an analysis of those policies revealed that will either advance or impede the work?

What gaps in existing policies has your organization identified? How do these gaps restrict the work? How do the gaps negatively impact youth who are Black, Latinx, or experiencing poverty? How will these gaps be closed?

How does your organization use its influence, authority, and power to set policy agendas, especially those that benefit youth who are Black, Latinx, or experiencing poverty?

Cross-Cutting Functions

Certain functions and features of intermediaries cut across all aspects of this work. These functions and features are no less critical for high-quality pathways intermediaries.

Indicator	Status and Notes: Not Present, Initiating, Developing, Demonstrating
The intermediary is committed to diversity, equity, and inclusion 1. The intermediary has clearly articulated internal and external commitments to diversity, equity, and inclusion that shape relationships, planning, and decision making.	
The intermediary has and leverages an effective steering committee 1. The intermediary has assembled a steering committee of key stakeholders and partners. 2. The committee regularly meets to advise on planning and decision making. 3. The committee increases the intermediary's engagement, reach, and impact.	
The intermediary convenes and collaborates with its partners 1. The intermediary regularly convenes key stakeholders for a variety of purposes. 2. Collaboration is frequent, formalized, and leads to the achievement of agreed-upon goals.	
The intermediary supports formalization of partnerships 1. Partnerships with K-12 and postsecondary entities and employers are formalized using memoranda of understanding/agreement (MOUs/MOAs), letters of engagement, etc. 2. The intermediary and its K-12, postsecondary, and employer partners share responsibility for the coordination and alignment of work-based learning opportunities across the ecosystem.	

Partners publicize work-based learning opportunities
1. The intermediary publicizes and advertises work-based learning opportunities across the ecosystem.
2. Stakeholders are aware of these opportunities and take advantage of them. The intermediary regularly revisits and updates its marketing campaigns.

Planning Questions

What are your organization's internal and external commitments to diversity, equity, and inclusion? How do these commitments influence your work? How are they communicated and monitored?

Who sits on the steering committee? How were the members of the committee chosen? Does the steering committee represent the ecosystem your organization serves?

Are stakeholders regularly and formally convened? If so, how could the convenings be improved? If not, what are the barriers to holding convenings?

Are partnerships across the ecosystem formalized through MOUs/MOAs, letters of engagement, etc.? If not, how does this impact relationships, division of labor among partners, and the work?

Are there effective advertising campaigns for work-based learning? For marketing your work? How do stakeholders know about your organization and its goals, vision, mission, and work?