From Demonstration to Field-Building: The James Irvine Foundation’s Linked Learning Initiative

On October 28, 2013 California Senate President pro Tem Darrell Steinberg, flanked by some of the state’s leading employers and educators, announced the launch of the $250 million Career Pathways Trust, a competitive grants program for high schools, community colleges, and their business partners to create pathways for careers in high-need, high-growth occupational sectors. “We’ve invested a lot of time and money helping kids after they drop out of school, without enough focus on prevention,” said Senator Steinberg. “This substantial grant reaches California’s kids before they fail by keeping them engaged with an education that’s both rigorous and relevant to college and career. With this Linked Learning model of learning, curriculum comes alive through the lens of careers and ultimately leads to good paying jobs.”

For Anne Stanton, Program Director for Youth at the James Irvine Foundation in San Francisco, the press conference was a special moment, the culmination of a nine year journey to build public understanding and support for a new model of high school education, one that links rigorous academics with relevant career and technical education. However satisfying the moment, Stanton was only too aware that with new state resources come a whole new set of challenges.

Background

Anne Stanton joined the Irvine Foundation as a Program Director in November 2003. She had known the foundation as a grantee in her role as Executive Director of Larkin Street Youth Services, a Bay Area non-profit organization serving over 3000 homeless and runaway youth in 18 programs in 10 sites. In her decade leading Larkin Street, the organization had more than doubled in size, growing from 50 to 115 employees and from $3.5 million to $8.7 in annual budget.

Prior to Stanton’s arrival, the Irvine Board completed a strategic planning process in which it reduced the number of program areas and sharpened the focus of those that remained. Consequently, the Youth
program Stanton was hired to lead replaced a program that encompassed Children, Youth, and Families and spanned early childhood through higher education. The board initially defined youth as ages 11-20 but Stanton was quickly able to redefine the age span to 14-24. It took her a year or so to wind down the portfolio of grants she inherited and to start the transition to a new focus solely on youth in 2005.

From her long experience working with at-risk young people, she came to the foundation with a very strong bias: “I knew that education for education’s sake was simply not relevant for many, many young people, and that the key to getting kids on track was to address the career piece. I saw a career focus as a prevention strategy, not just a recovery strategy.” That said, she also knew well that vocational education had had a troubled history, especially when it came to low-income and minority youth. The perception, especially in communities of color, was that too often vocational programs were “dumping grounds,” places to assign students who were deemed not capable of doing the kind of rigorous academic work required for college. Stanton understood that in order to make the case for investing significant foundation resources in strengthening the career focus in California high schools, she would have to develop a strategy powerful enough to address the stigma associated with vocational education.

**Building a Strategy**

In the months leading up to the development of a program white paper, Stanton consulted widely in the youth and education field, building relationships with key thought leaders and funders who shared her core values. In March 2005, Stanton presented her program paper to the Irvine Board, clearly stating that her core program goal was “increasing the number of low income California youth who complete high school on time and attain a postsecondary credential by 25.” In order to accomplish this outcome, Stanton argued that the young person’s journey “must be characterized by viable, visible, and compelling educational career and life options or ‘multiple pathways’, “ an idea she went on to characterize as “the most promising approach … for achieving increased secondary and postsecondary retention and achievement rates.”

What did Stanton mean by “multiple pathways?” Multiple pathways are “comprehensive programs of study that connect learning in the classroom with real-world applications outside of school. The pathways integrate rigorous academic instruction with demanding technical curriculum and work-based learning – all set in the context of a major industry sector.”

Stanton’s goal and the “multiple pathways” strategy were already in the policy ether in 2005 – perhaps most notably in a 2003 national conference called “Double the Numbers: Increasing Postsecondary Credentials for Underrepresented Youth” and in the collection of the conference papers published a year later in a volume with the same title. However, no other foundation, national or regional, had embraced this goal as directly as Stanton, and no other foundation had stepped up to the challenge of trying to reinvent vocational education through a multiple pathways approach. Indeed, the first of five strategies Stanton identified in her program paper for addressing the postsecondary attainment goal was “Promoting Academically Challenging Career and Technical Education in California High Schools.” In order to pursue this strategy, as a first step she engaged MPR Associates, a leading education research consulting firm based in the Bay Area, to “conduct a study of the desirability and feasibility of establishing a California Center for Career and Technical Education.”
The Creation of ConnectEd California

In September 2005, MPR presented the results of its study to the foundation. The MPR team interviewed 130 key stakeholders over the course of the study, asking four key questions:

1. Is there a role for CTE in California high schools, and if so, what should it be?
2. Would establishing a California Center to help promote challenging career and technical education be useful and valuable?
3. If a Center were established, what should be its primary mission and functions?
4. How should a Center be positioned to maximize its effectiveness?

While the results of the interviews were hardly unanimous, there was generally strong support for the idea of establishing a center to advance the role of CTE in high school improvement, especially if such a center emphasized strong integration with core academics and the importance of preparing students for the full range of postsecondary and career options and opportunities. The hope was that the Center could play a leadership role in supporting the development of multiple pathways that prepare students for college and career, not one or the other.

In order to protect against a natural bias that might lead to finding the answer they were seeking, Irvine took the precaution of establishing an independent National Advisory Committee of leading experts in the field to review the results of the study and make its own recommendations to the Foundation. The Advisory Committee unanimously endorsed the MPR report and recommended that the Foundation establish a Center.

In her report to the Board, Stanton not only recommended the creation of an independent non-profit California Center for Career and Technical Education, but proposed that the Center should be affiliated with MPR and that MPR’s President, Gary Hoachlander, become the Center’s Director. Her rationale for this unusual proposal was two-fold. First, the affiliation with MPR, and especially with Hoachlander, would give the Center instant credibility. Hoachlander was a highly regarded expert on career and technical education, having carried out major national studies for the US Education and Labor Departments. Second, working out a management services agreement with an established organization would enable the new Center to get up and running quickly. MPR could provide space and other kinds of organizational infrastructure that the Center would not have to build on its own, thereby enabling it to focus its energies on its programmatic agenda.

Hoachlander would later say, “Initially I had hoped that we could locate the Center within MPR. However, MPR was a for-profit organization and it was apparent to all of us that Connect Ed needed to be a non-profit. Consequently, we all agreed that MPR would incubate ConnectEd.”

Stanton’s memo to the Board identified four significant risks in establishing the Center. First, might the opportunity costs of establishing a Center outweigh its benefits? Dollars spent to create a new institution means fewer dollars available to support on-the-ground demonstration programs. Second, what if the Center was unable to diversify its funding sources and became solely dependent on Irvine to sustain it? Third, would the fact that MPR had carried out the feasibility study create a credibility problem for the new organization and for the Foundation? And fourth, what if the current political and policy interest in rethinking CTE were a temporary phenomenon? Would the Foundation then be stuck with a Center in
whose work there was declining interest? To each question Stanton offered sufficiently convincing answers to persuade the Board to create the Center.

**ConnectEd’s Mandate**

Irvine formally launched the California Center for Career and Technical Education – named ConnectEd – in March 2006. Stanton knew that ConnectEd’s long-term success would depend on its ability to develop reliable support from peer foundations. However, she wanted to ensure that Hoachlander and his initial staff could spend the first 18 months focused entirely on the mission without having to worry about fundraising. After much consultation with her board, she settled on an initial grant of $6 million dollars over 36 months. The plan was for the organization to start with a staff of four to six, but to grow in five years to between 10 and 15.

“Anne recognized early on that this was not a quick fix,” Hoachlander said. “She and the board communicated clearly to us that they were in this for the long haul. I can’t overemphasize the importance of that because it brought stability and security to this work that was enormously valuable.”

ConnectEd was established as its own 501(c)(3) so, though it would have a close relationship with Irvine, its primary funder, Hoachlander would formally report to his own board of directors. Stanton, however, played a significant role in recruiting and approving the initial board members and hired a communications consultant to develop a communication plan for the Center, including identity development (i.e. a name and logo) and a broader communications plan for the ConnectEd’s launch.

In a memo to her board in October 2006, Stanton laid out a strategic vision for ConnectEd: “ConnectEd is designed to serve as a hub for innovative practice, policy and research to expand the number of education pathways that prepare students for both college and career. To reach that end, it is focusing on three separate, but related, activities: demonstration, evaluation and policy formation. First, ConnectEd will identify and demonstrate promising practices for engaging students in comprehensive courses of study that integrate rigorous academic and technical education. Second, it will support the evaluation of these practices and dissemination of the results to policymakers, practitioners and the education field. Third, ConnectEd will use what has been learned to promote dialogue about the public policies that are needed to nurture more effective programs and increase student success.”

**Model Pathways Initiative**

Hoachlander’s first major task was to transfer the work of the Model Pathways Initiative from his previous organization, MPR, to ConnectEd. Begun in 2005 with a $1.75 million grant from Irvine to MPR, the Model Pathways Initiative was a network of seven California high schools with multiple pathways. The high schools represented a broad range of program models, including career academies housed within comprehensive high schools, stand-alone schools, and regional occupational programs that served students from several districts.
Still, Hoachlander had reservations about leading an initiative that saw the school as the unit of change. “If there was one thing I had learned from thirty years of being involved in this work, it is that you can’t do this school by school and be successful on any scale. You are just going to perpetuate the islands of excellence problem that has plagued education forever. More often than not, the effective pathways we saw in 2005 existed in spite of the system and not because of it. There was no district infrastructure to support and sustain their work. Also, despite the fact that pathways had been around for a long time, there was tremendous variability in the quality of those pathways.”

These concerns were integrated early on into a comprehensive strategy that positioned Model Pathways Initiative as only the first of many steps to scale. By working directly with schools offering a range of different programs and pathways, ConnectEd could act as a knowledge hub, promoting cross-site knowledge sharing as the network expanded to 16 schools over the first 18 months. Once the network and ConnectEd’s own internal infrastructure were up and running, the organization could create industry-specific curricula and deliver curriculum-specific professional development modules. As the schools started to demonstrate impressive results, ConnectEd could coordinate research and evaluations of the network’s impact, communicate the results to a broader audience, and build a coalition of key education, business, and community leaders around policy changes to support pathway expansion to the district and state levels.

From Schools to Districts

By 2009, just three years after the organization’s launch, Hoachlander and Stanton had established ConnectEd as the leading voice for multiple pathways reform in California. The organization had initiated or completed pathway design and curriculum development related to eight industry sectors, and the Model Pathways Initiative had become a full-fledged network of 16 schools that represented 12 of California’s 15 major industry sectors. Moreover, initial data from the sites (detailed in the Foundation’s Annual Performance Report) suggested that students in the schools were out-performing their peers across a range of outcomes. On the policy front, ConnectEd wrote and published Expanding Pathways: A Policy Guide for Transforming High School Education in California, which defined the essential principles and core components of multiple pathways, summarized the research basis for effective design and implementation, and outlined the policy agenda that would have to be addressed to support wider

Examples of Schools on the Ground

One of the first schools to join the network was the Center for Advanced Research and Technology (CART) in Clovis, California. More than 1500 juniors and seniors from 13 Clovis and Fresno Unified high schools attended CART in the morning or afternoon and then spent time at their home school for the rest of the day. Students selected one of fourteen one- or two-year labs that fell into the themes of Advanced Communications, Professional Sciences, Global dynamics, and Engineering. Each lab was interdisciplinary and taught collaboratively by two to four teachers, and students received a total of 20 credits for each year-long lab.

Another early school in the network was Life Academy in Oakland, California. With around 250 students, Life Academy used project-based learning to engage students in the fields of health and bioscience, and all 11th and 12th grade students were required to participate in internships in those fields. Teachers at Life Academy were guided by the schools 16 “Habits of Mind” that include goals like “Applying Past Knowledge to New Situations” and “Creating, Imagining, Innovating.” These habits informed an “Internship Habits” rubric that was used – in addition to logs, project reports and presentations – to assess students’ performance and learning at their internship site.
adoption in California’s school districts.

The four core components of the multiple pathways approach (later to be renamed Linked Learning, see p.10) were, by this point, well established:

- **Rigorous academics**: An academic core that includes college preparatory English, mathematics, science, history and foreign language courses for all students.
- **Real-world technical skills**: A challenging career-based component of three or more courses to help students gain the knowledge and skills that can give them a head start on a successful career.
- **Work-based learning**: A series of work-based learning opportunities that begin with mentoring and job shadowing and evolve into intensive internships, school-based enterprises or virtual apprenticeships.
- **Personalized support**: Services including counseling and supplemental instruction in reading, writing and mathematics that help students master academic and technical learning.

In a March 2009 memo to her Board, Stanton laid out the sequential steps in her ambitious multiyear strategy to make multiple pathways programs available more broadly across the state, especially to low-income youth. Phase I was developing and refining the multiple pathways model (2004-07). Phase II (2006-09) was demonstrating in 15-20 school sites that the model could improve student outcomes. Phase III would demonstrate over the next five years (2009-14) in five to eight districts that the model could begin to scale. In Phase IV (no specified timeline) the model would be adopted statewide and be accessible to the majority of low-income youth.

In an earlier memo to her board, Stanton outlined the strategic shift from schools to districts with the following justification: “First, working with districts on the design and implementation of a system of multiple pathways offers students many more options. For those districts operating three or more high schools, it is possible to envision a system that would provide students with access to at least six of the 15 industry sectors that make up the multiple pathways framework. Second, demonstration of the model at a district-wide level will help Irvine, key stakeholders and the broader field to understand the successes and challenges of bringing multiple pathways to scale as a core strategy in districts working to transform their high schools.”

In late 2008, Irvine set out to recruit and select a cadre of interested districts, and through ConnectEd, released an RFP for districts interested in planning for pathways. After receiving thirty proposals, ConnectEd awarded ten planning grants of $125,000, using four selection criteria:

- District-wide high school enrollment equals or exceeds 5,000 students, and the districts have the capacity to offer six to eight pathways
- Students eligible for free and/or reduced lunch equals or exceeds 30 percent of total enrollment
- Evidence of some existing capacity, and demonstrated track record, on which to develop larger system of multiple pathways
- Statewide geographic representation

The grants enabled districts to conduct in-depth needs and capacity assessments that looked at what was already in place to support the work. Districts also developed implementation plans that focused on everything from the selection of pathways, to development of new capacity, to integration with existing
structures. By allowing districts to create their own plans, Stanton was making an explicit decision at the time to propose a broad approach to high school reform rather than a specific model.

In June 2009, the Irvine Board approved an omnibus $11,375,000 grant to ConnectEd that included two-year implementation grants averaging $1,150,000 to six of those ten districts:

- Antioch Unified
- Long Beach Unified
- Pasadena Unified
- Porterville Unified
- Sacramento City Unified
- West Contra Costa County Unified

Among the review criteria used by ConnectEd and Irvine in selecting these districts were:

- Strong district leadership committed to making multiple pathways a central strategy for transforming their high schools
- An existing infrastructure of strong pathways programs
- A broad-based community coalition to support implementation
- A credible plan to implement four to eight high quality pathways within three years

Over $4 million of the omnibus grant was allocated for ConnectEd to provide technical assistance, coaching, and professional development to these districts and to support cross-district learning. An additional $500,000 was set aside to support extended planning in the four districts not selected for implementation grants. In 2010, these four districts – Los Angeles Unified, Montebello Unified, San Diego Unified, and Stockton Unified – received implementation grants as well.

In order to maintain the strategic importance of the pathways work, Stanton sought to create a community of practice across the districts. At the launch of the implementation work, Irvine held a one-week Summer Leadership Institute for the participating district teams in collaboration with the Stanford School Redesign Network, and then continued to bring leaders together periodically for networking and professional development sessions. They also developed a cadre of leadership coaches to assist with pathway development in the districts.

**Evaluating the District Initiative**

As Irvine’s scale grew from schools to districts, the question of how to assess progress and impact became even more critical. As with the Model Pathways Initiative, Stanton believed that if the District Initiative could hold up to an independent evaluation, the Linked Learning approach would gain more traction. However, the scale and complexity of the district work created a greater need to codify successes and failures and disseminate them around the network. Moreover, as Stanton’s investments in Linked Learning began to add up, she felt under increasing pressure to demonstrate evidence of success.

Therefore, in 2009 Stanton awarded a $2 million, 44-month grant to SRI, an independent research institute, to produce annual evaluations of the District Initiative. Specifically, she identified four objectives for the research:
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- Assess the impact of Linked Learning pathways on student outcomes
- Assess the key features and outcomes of a district-wide approach to Linked Learning
- Assess the level and quality of implementation in each district
- Provide the Foundation, ConnectEd and participating districts with data and information to support ongoing program improvement

The problem Stanton faced from the beginning of the district work was how difficult it would be to conclusively determine whether or not district pathways had impacted student outcomes. Indeed, in their first report in 2010, SRI warned, “Although we will report preliminary summative findings at the end of the evaluation period, the evaluation team will not be able to arrive at a final assessment on Initiative effectiveness; such a determination will require many years to complete as graduates move into further education and into careers. Consequently, we intend to help the major stakeholders identify tools and strategies that will help them continue to assess the value of a pathway education over time.”

In addition, the different designs and implementations of pathways across the districts (i.e. one district’s pathways program doesn’t begin until 10th grade) made it difficult to isolate a consistent intervention. The districts’ data collection capacity also varied significantly, and in several cases, SRI had to rely on data from previous years or just exclude the district’s data set from the evaluation.

**BridgeSpan’s Landscape Scan and “Strong Field” Analysis**

Stanton understood from early on that as central to her strategy as ConnectEd had been, she would need to engage many more organizations and players in the work if her ambitious goal of making multiple pathways accessible to most low-income youth in California were to become a reality. A review of the Youth Program’s annual grants in 2007 and 2008 shows just how active the Foundation was in starting to build out some of the key elements of a field of practice. There were grants to the Education Development Center (EDC) to build tools and curriculum resources to support the development of pathways in law and justice and arts, media and the entertainment industry ($4.7 million). There were grants to the National Academy Foundation ($2 million) and the Career Academy Support Network ($500,000) to provide additional capacity and technical assistance to support the development of high-quality career academies. There was a large grant ($4.4 million) to the Community College Research Center at Teachers College, Columbia University to support the implementation of eight dual enrollment programs (3000 students total) developed collaboratively

**A Model District**

From the initial stages of the District Initiative, it was clear to Stanton that Long Beach Unified School District had the potential to become an existence proof for the multiple pathways movement. For one thing, LBUSD was already seen as a major leader among the state’s large school districts. Moreover, it had already broken its large high schools into smaller learning communities, and giving these communities a stronger career focus was a natural next step.

Working with its higher education and industry partners, LBUSD created an ambitious five-year plan for district-wide high school transformation based on the multiple pathways approach. Spread over six large, comprehensive high schools and three smaller, specialized schools, the district implemented a system that offered students a choice of fifteen different pathways, including Law and Justice, Health Sciences, Media Technology, Building Trades and Construction, and Fashion and Interior Design. Students chose pathways based on their interests, though the college preparatory curriculum offered in all of the pathways meant that graduating students could complete the necessary coursework required for admission to the University of California system.
by high schools and community colleges. There were also several grants focused on regional coalition-building and strategic communication. All together, the Youth Program made 99 grants totaling $45.2 million in two years.

In the summer of 2008, Stanton commissioned the Bridgespan Group, “a non-profit advisor to mission-driven organizations and philanthropists,” to undertake a landscape analysis to help the foundation understand who the other major actors were in the multiple pathways arena, what their goals and strategies were, and where the opportunities to strengthen the field might lie.

Bridgespan began by defining a field as “a community of actors who engage in a common set of core practices with a common goal for their work.” For purposes of this assessment, it defined the multiple pathways field in California as encompassing three sets of programs: Career Academies, California Partnership Academies, and the ConnectEd model academies. At the time, there were roughly 1000 academies in these three categories operating in California, serving roughly five percent of high school students. Bridgespan developed a framework for defining what it considered a “strong” field, which had five components:

- Shared identity
- Standards of practice
- Knowledge base
- Leadership and Grassroots Support
- Funding and Supporting Policy.

Bridgespan then conducted interviews and focus groups with 60 leaders and stakeholders. Its study was guided by a 24-person Advisory Committee on which both Stanton and Hoachlander served.

In December 2008, the results of Bridgespan’s Assessment were presented to the Irvine Board. Their conclusion was that while the multiple pathways field had already established significant momentum, it was still at an early stage of development – in fact, it felt more like a movement than a field. The report concluded with three broad recommendations:

- “Develop a clear, precise definition of multiple pathways, messaging aligned with that definition, and a quality-control system to distinguish high-fidelity implementation;
- Establish large-scale, system-wide demonstrations;
- Work to increase state funding and create more supportive policies to facilitate broad adoption.”

These three recommendations provided the Foundation one among several lenses through which to view the Youth Program’s work over the following several years.

**Beginning to Scale**

The Bridgespan report played a significant role in Stanton’s March 2009 Youth program memo to her board. As mentioned above, this memo laid out the timeframe and sequential steps for getting to statewide adoption of the multiple pathways approach. The memo also acknowledged that while ConnectEd would remain the “hub” for the expansion of multiple pathways, scale could not be achieved without building a much stronger network of regional intermediary organizations and technical
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assistance providers. Consequently, the Program funded such organizations as the Career Academy Support Network and the National Academy Foundation. These organizations had come into being many years earlier to support, respectively, the California Partnership Academies and the growing number of career academies in the state. Stanton went on to identify a key challenge, one that no organization working in this field addressed adequately:

“We will need to be particularly attentive to addressing what is still a major gap in the field: the lack of intermediary organizations with the expertise to connect and support partnerships between schools and businesses. Failure to address this gap poses substantial risks to our ability to bring work-based learning, a key component of the multiple pathways model, to scale.”

Stanton laid out for the board a wide-ranging field and coalition-building strategy that was already underway, but now needed to be accelerated. She cited some early wins on the policy front, including the passage of a law (Assembly Bill 2648) that established ConnectEd’s definition of multiple pathways in state code and directed the California Education Department (CDE) to develop a feasibility report on making multiple pathways opportunities available to students statewide. (The report that followed, *Multiple Pathways to Student Success: Envisioning the New California High School*, has been an important blueprint for state policymakers since its publication in 2010). She referenced the Coalition for Multiple Pathways that ConnectEd had established as part of its work, but also acknowledged the need for a more aggressive and independent organization to build political support for state policy and funding changes, as recommended by Bridgespan.

Stanton then went on to address the major messaging challenges identified in the Bridgespan report. Among the questions she framed for the board were the following:

- How is the Foundation’s voice best used in the effort to advance the field?
- Can ConnectEd’s definition of multiple pathways become the “gold standard” without alienating other leaders in the field?
- How best to promote and expand multiple pathways in the current economic downturn?

Stanton and her team had understood from the beginning the importance of strategic communications planning. In their initial grant to ConnectEd, they built in resources for media relations, messaging, and planning for significant events designed to increase awareness of the organization and the multiple pathways agenda. Hoachlander notes, “There was recognition early on by Irvine that strategic communications would play a critical role in developing the awareness, understanding, and broad-based support necessary to take this work to scale. They wanted to ensure that organizationally we had that type of capacity. My style at MPR was to keep a low profile; we were not an advocacy organization so I found it enormously beneficial to get the training. Public speaking, dealing with the press, power point presentations, and strategic communications planning were all things that had never been a high priority, but now needed to be a high priority for an organization with a mission like ours.”

Finally, Stanton informed the board that she had engaged a communications firm to develop a messaging framework and strategy. She signaled that one important issue for discussion with an advisory group of leaders from the field was whether “multiple pathways” was the best name for this emerging field.
The Transition to Linked Learning

The BridgeSpans report highlighted for Stanton the importance of clearly communicating the core of Irvine’s work and the problem with the current definition. “Multiple Pathways had come to mean multiple things to multiple people,” Stanton said. “In New York, for example, it was primarily known as a way to help severely behind students get back on track to complete high school. We needed a name that was as distinctive as what we were doing.” Toward the end of 2009, Stanton convened a group of grantees and Spitfire Strategies, a communications firm, to explore the possibility of choosing a new name more closely tied to Irvine’s work of preparing students for college and careers. They settled on “Linked Learning,” a name that more accurately reflected the focus on changing the practice of schooling, not just the structure. The decision to move to a new name for the initiative was contentious, because of the fear of losing the momentum and recognition that had been accomplished under the old name. Ultimately, Stanton was convinced that “we needed something that was going to build stronger ownership and energy among all groups at the table. Multiple Pathways just wasn’t doing that.”

Once the decision was made, Irvine worked with Spitfire to develop a two-year marketing plan to support the name-change. In the early stages, communications efforts focused on helping the field adopt the new name and create a united front across outreach activities. Communications then focused on educating target audiences on the benefits of the approach.

The Linked Learning Alliance

Although policy formation was originally envisioned as one of ConnectEd’s three core activities, by 2009 both Stanton and Hoachlander agreed that it would make more sense to separate that function from the practice work with schools and districts, and to create a separate structure to carry out Linked Learning’s convening and policy agenda. ConnectEd may have been the convener of these meetings, but it had become clear by 2010 that the Foundation was now functioning as the “hub” and driver of the broader Linked Learning agenda.

Consequently, in late 2010 the leadership for the Linked Learning Alliance, created in March 2008 as “a statewide coalition of education, industry, and community organizations dedicated to improving California’s high schools and preparing students for success in college, career, and life,” shifted from ConnectEd to a Sacramento-based consulting group, Capitol Impact LLC, and one of its partners, Christopher Cabaldon, became Executive Director.

Cabaldon was a highly experienced and politically savvy Sacramento insider who had served in senior staff positions in the state legislature and been Vice-Chancellor of the state community college system. He had also served as executive director of a statewide education advocacy organization and was the long-serving Mayor of West Sacramento. As his Deputy, Cabaldon recruited Hilary McLean, a communications specialist with substantial history of work on California education issues.

Prior to Cabaldon’s tenure as Alliance director, the Alliance had mainly functioned as a convener of the growing cadre of Irvine grantee organizations. While these semi-annual meetings enabled the leaders of the grantee organizations to share information and Stanton and her team to keep the field informed of the Foundation’s unfolding strategy, the Alliance had no particular policy agenda of its own. These convenings, and a larger annual conference the Alliance sponsored, were important vehicles for
broadening the Linked Learning coalition and for Stanton to keep her growing army of grantees on message and moving in the same direction.

Under Cabaldon’s leadership, the Alliance very quickly became a significant political force, hosting meetings and events around the state, growing a membership of over 100 organizations representing business and industry, education, and community; recruiting key leaders across the sectors to serve on its Leadership Council; and working closely with legislative leaders to develop an agenda to advance state support for Linked Learning. (See Exhibit II for current Leadership Council members).

In 2011, the Alliance scored a major legislative victory with the passage of AB 790, the Linked Learning Pilot Program. This bill, sponsored by the Los Angeles Chamber of Commerce and tirelessly driven by Chamber Vice-President and Alliance Leadership Council Chair David Rattray, provided for the expansion of Linked Learning to an additional 63 districts. Collectively, these districts, along with the nine in the Linked Learning District Initiative, serve about 600,000 high schools districts. When fully implemented, more than a third of high school students in the state would have access to Linked Learning pathways.

Although AB 790 had no new funding stream attached to it, a year later the legislature enacted SB 1070, the Career and Technical Education Pathways Program. This legislation, sponsored by Senate President pro Tem Darrell Steinberg, authorized the Superintendent of Public Instruction and the Chancellor of the Community College System to make competitive grants to strengthen the alignment between secondary and postsecondary CTE curriculum, to expand work-based learning, and to promote industry education partnerships. It also allocated roughly $5 million for the Linked Learning Pilot Districts, a token amount when viewed against the many millions Irvine had invested in its Linked Learning District Initiative, but useful to support initial planning in the new districts.

Stanton and her colleagues were initially ambivalent about the passage of AB 790. Given their goal of making Linked Learning available to a majority of low-income California youth, this was obviously an enormous step in that direction. However, given their knowledge of the capacity challenges in the system, they were fearful that the brand and reputation for quality that they and ConnectEd had worked so hard to build in their initial schools and districts could be jeopardized if the new districts received little or no help in implementing Linked Learning. Consequently, Irvine indicated that it would do what it could to make the tools and supports developed by ConnectEd and its other grantees available to the pilot districts.

**Ramping Up**

By 2010, the Foundation had an active portfolio of 89 grants totaling $65.8 million in support of its Linked Learning initiative. A review of the Youth Program grants in 2011 and 2012 indicated a foundation operating at full throttle to take advantage of the opportunity created by the state’s decision to exponentially expand the number of Linked Learning districts; in these two years, Irvine made 87 new grants totaling $45.8 million for one or another aspect of Linked Learning. The following selective list provides a sense of the depth and breadth of the Youth Program’s strategy to support the scale up of Linked Learning (See Exhibit III for a 2012 outline of the strategy).
2011 Grants:

- **ConnectEd**: $8.85 million, in support of the Linked Learning District Initiative
- **CSU Fresno**: $850,000, to support the development of Engineering and Construction Management pathways
- **Stanford**: $1.2 million, to support a District Leadership Series for Linked Learning districts
- **New Teacher Center**: $600,000, to support coaching, professional development, and teacher leadership
- **CSU Long Beach**: $630,000, to develop a Linked Learning clinical teacher education program
- **CSU San Diego**: $1 million, to develop a network of graduate-level teacher education programs for Linked Learning
- **Institute for Evidence-Based Change**: $1 million, to build a data system to track student progress in Linked Learning high schools
- **Rockefeller Philanthropy Advisors**: $800,000, to support and manage the Linked Learning Alliance
- **Alliance for Excellent Education**: $500,000, to inject the Linked Learning model into federal policy discussions

2012 Grants:

- **ConnectEd**: $5.7 million, to extend support for Linked Learning districts
- **National Academy Foundation**: $1.5 million, for additional assistance and support to Linked Learning academies
- **Education Trust-West**: $400,000, to assure rigor and equity in the scaling up of Linked Learning
- **CA School Boards Association**: $400,000, to raise awareness and facilitate implementation of Linked Learning
- **Foundation for CA Community Colleges**: $3.7 million, to create pathways into postsecondary education for Linked Learning programs
- **Policy Impact**: $1.3 million, to support the Linked Learning Alliance
- **Hart Research Group**: $240,000, for communication guidance around Linked Learning
- **GMMB**: $850,000, to coordinate and build communications capacity for the Linked Learning field
- **SRI**: $2 million, to continue the evaluation of Linked Learning

**Career Pathways Trust**

For a number of years, Senate President pro Tem Steinberg had been the principal advocate in the California legislature for the broader Multiple Pathways/Linked Learning agenda. Steinberg had become increasingly convinced that the four-year-college-for-all mantra distracted the state from paying adequate attention to the career purposes of education, and had been extraordinarily resourceful and energetic in building support among his Senate colleagues for this position.

In early 2012, he pushed through a bill to modify the state’s accountability system for high schools, moving away from an over-reliance on test scores and insisting that the state develop a broader set of measures of college and career readiness. Later that year, Steinberg took a small delegation of legislators with him on a study tour of the Swiss and German vocational systems, systems in which most young people from age 16 enter three-year programs that combine work and learning and lead to nationally
recognized credentials with real value in the labor market. In early 2013, he took the entire California Senate on a site visit to Long Beach to see a large, highly diverse school district in which the vast majority of students were now in wall-to-wall Linked Learning programs.

These experiences convinced Steinberg that it was time for California to step up its investment in programs that had the potential to make available to students the kinds of opportunities he saw in the strongest Swiss and German programs, programs that in U.S. setting would need to span the last years of high school and the first year or two of postsecondary education. Consequently, he inserted into the FY 2014 budget language authorizing the creation of the Career Pathways Trust (CPT), with an initial appropriation of $250 million. The budget language authorized the California Department of Education (CDE) to design a competitive grants program to expand existing career pathways programs or develop new ones. The idea was to encourage regional partnerships between high schools, community colleges, employer organizations, and the workforce system to develop pathways that would span grades 9-14 and provide students with the knowledge and skills to seek employment in such high-growth, high-demand fields as information technology, health care, and advanced manufacturing.

As CDE staff and their colleagues in the community college and workforce systems developed the guidelines for the grants program, they decided to create three tiers: 10 awards of up to $15 million for large regional projects; another 15 awards of up to $6 million for smaller regional projects; and 15 smaller awards of up to $600,000 for more local projects. CDE sponsored three well-attended, one-day regional institutes in December to explain the underlying vision and goals of the Trust and to generate interest in the field. These institutes were followed by more focused bidders conferences in early 2014 to explain the application process. The application deadline was March 28, 2014, and CDE received roughly 150 applications for over $750 million, encouraging Senator Steinberg to begin speaking openly about his intent to seek an additional appropriation for the Trust in the next legislative session to respond to the unmet demand.

**Looking Ahead**

As Stanton reflected on how far her work had come since commissioning the Bridgespan field-building report in 2008, she could not help but take some satisfaction as she remembered the report’s three final recommendations. While there continued to be differing factions with different goals within the broader field of career and technical education, the name-change to “Linked Learning” and the consequent investments in branding and messaging had produced increased public understanding of the model, and increased use of it as a new frame for rethinking the learning goals and structure of high schools, as evidenced by Senator Steinberg’s reference to it in the press conference announcing the creation of the Career Pathways Trust.

On the second recommendation – to provide a large scale demonstration of the model – the sudden addition of 63 new districts, along with the about-to-be-funded regional pathways consortia, more than met the test of scale. Finally, Bridgespan could not have envisioned a more robust response to its recommendation that the Foundation seek public funding and supportive policy than the creation of the Career Pathways Trust.

Much as Stanton may have wanted to declare victory, however, she had to be sobered by the release in September 2013 of SRI’s Year 4 evaluation of the Linked Learning District Initiative. The good news was that the key findings on student outcomes were mostly positive: the report notes that “students
participating in Linked Learning are on track for high school graduation, preparing for college and building skills for career and life. For example, students enrolled in certified pathways are accumulating an average of 6.6 more credits than students in traditional programs, and are 8.9 percentage points more likely to be on track with 4 year higher education a–g requirements at the end of 10th grade.” The report also notes, however, that “these differences in student behavior do not seem to lead to higher scores on standardized tests of English language arts and mathematics content knowledge.” Additionally, the report goes on to observe that, “In our student survey, pathway students were more likely than comparison students to report that high school has helped them develop professional competencies such as collaboration and presentation skills as well as a greater sense of self-efficacy and the value of school.” (See Exhibit IV for an infographic summarizing the 4th Year evaluation results).

The sobering part of the SRI report for Stanton was in the lessons the evaluators drew from their study of these nine districts in which Irvine and ConnectEd had invested so much high quality attention and support. SRI outlined three sets of “essential elements for Linked Learning” required for effective implementation. The first set had to do with the district-level structures, policies, and practices that would need to be in place. This list included such things as a common vision for Linked Learning, a communication plan, key leaders who could serve as “visible and public champions,” a dedicated program director, and a cross-district Linked Learning leadership team.

At the Pathway level, SRI outlined such essentials as authentic and rigorous integrated academic and technical coursework, aligned work-based learning opportunities, a committed team of pathways teachers, a supportive master schedule with dedicated planning time, and active pathway-level advisory boards. Perhaps most critically, SRI identified a set of essential external supports, of the kind that ConnectEd had been providing for the past four years to the nine districts. These include district-level coaching, pathway-level coaching and technical assistance with specific implementation challenges, partnerships with business and community groups to support work-based learning, and networking opportunities within and across districts.

Stanton knew in her gut just how challenging it had been to bring her nine districts to the point where the indicators of success were moving in the right direction, and just how critical the intensive support from ConnectEd and her larger universe of grantees had been to that progress. How likely was it that these “essential” conditions would be in place in the 63 districts now about to call themselves Linked Learning districts, or in the regions about to receive Career Pathways Trust funding? How likely was it that there would be anything resembling high-fidelity implementation of the model that ConnectEd had so painstakingly developed with Foundation support? While the Youth Program’s resources were sufficient to provide significant implementation support to nine districts, where would the capacity come from to support this huge expansion of Linked Learning? As Stanton put it, “One huge issue moving forward raised by the establishment of the Career Pathway Trust is the challenge of moving to a regional platform. This really falls into the category of ‘be careful what you wish for.’ With regions, the table has to be set so differently. Everyone’s role has to change.”
These were some of the questions on Stanton’s mind as she thought about what might come next. It was also on her mind that Jim Canales, the Irvine President who brought her to the foundation a decade ago, had announced his resignation and that a search was well underway for his successor. Stanton could not have asked for a more supportive board and president, and she understood just how unusual it was in the foundation community to be given the backing to pursue such a focused agenda for a full decade.

Tempting as it might be to declare victory now that the state had stepped up so aggressively, she could not help but focus on the huge implementation challenges ahead, and the potential dilution of the Linked Learning approach and brand if there were not some strong, independent organization like Irvine continuing to advocate for and protect it.
Exhibit I: Timeline

November 2003 – Anne Stanton joins the Irvine Foundation as Program Director

March 2005 – Stanton engages MPR to conduct study on feasibility of a California Center for Career and Technical Education

October 2005 – Irvine funds MPR to launch the Model Pathway Initiative with MPR

May 2008 – Irvine launches the Coalition for Multiple Pathways, housed initially at ConnectEd

November 2008 – Irvine and ConnectEd announce 10 district planning grants

December 2008 – Bridgespan presents their field-building report to Irvine’s Board

June 2009 – Irvine awards $11.4 million to ConnectEd to launch the California Multiple Pathways District Initiative and hires SRI to conduct annual evaluations

November 2009 - With the help of Spitfire Communications, Irvine adopts the name Linked Learning to redefine its initiative

November 2010 – Leadership of the Linked Learning Alliance shifts from ConnectEd to Capitol Impact LLC

December 2011 – California legislature passes AB 790, the Linked Learning Pilot Program, to extend Linked Learning to an additional 63 districts

September 2013 – SRI releases the Year Four evaluation of the Linked Learning District Initiative

October 2013 – California Senate President pro Tem Darrell Steinberg announces $250 million Career Pathways Trust
Exhibit II: Linked Learning Alliance

**Leadership Council 2013-15**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Organization</th>
<th>Term Expires</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lupita Cortez Alcala</strong></td>
<td>Deputy Superintendent of Public Instruction Instruction, Learning &amp; Support Branch, California Department of Education (Ex-Officio)</td>
<td></td>
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<tr>
<td><strong>Bill Kelly</strong></td>
<td>Managing Director Sunpower Corporation</td>
<td>2015</td>
</tr>
<tr>
<td><strong>Linda Collins</strong></td>
<td>Executive Director Career Ladders Project (Term Expires 2014)</td>
<td></td>
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<tr>
<td><strong>Brian King</strong></td>
<td>Chancellor Los Rios Community College District (Term Expires 2015)</td>
<td></td>
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<tr>
<td><strong>Donald Gill</strong></td>
<td>Superintendent Antioch Unified School District (Term Expires 2014)</td>
<td></td>
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<tr>
<td><strong>KARL D. DECKER</strong></td>
<td>Executive Director Corporate Responsibility JP Morgan Chase (Term Expires 2015)</td>
<td></td>
</tr>
<tr>
<td><strong>Gary Hoachlander</strong></td>
<td>President ConnectEd: The California Center for College and Career (Term Expires 2015)</td>
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<tr>
<td><strong>David Plank</strong></td>
<td>Executive Director Policy Analysis for California Education (Term Expires 2015)</td>
<td></td>
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<tr>
<td><strong>Debra Jones</strong></td>
<td>Dean Career Education Practices, California Community Colleges (Ex-Officio)</td>
<td></td>
</tr>
<tr>
<td><strong>Arun Ramanathan</strong></td>
<td>Executive Director The Education Trust-West (Term Expires 2014)</td>
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<tr>
<td><strong>Jennifer Ortega</strong></td>
<td>California State Director America's Edge (Term Expires 2015)</td>
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<tr>
<td><strong>Patricia Rucker</strong></td>
<td>Legislative Advocate California Teachers Association (Term Expires 2014)</td>
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<tr>
<td><strong>Tim Rainey</strong></td>
<td>Executive Director California Workforce Investment Board (Ex-Officio)</td>
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<tr>
<td><strong>Chris Steinhauser</strong></td>
<td>Superintendent Long Beach Unified School District (Term Expires 2015)</td>
<td></td>
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<tr>
<td><strong>David Rattray</strong></td>
<td>Senior Vice President, Education &amp; Workforce Development Los Angeles Area Chamber of Commerce President, UNITE-LA (Term Expires 2015)</td>
<td></td>
</tr>
<tr>
<td><strong>Emir José Macari</strong></td>
<td>Dean, College of Engineering and Computer Science California State University, Sacramento (Term Expires 2015)</td>
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</tbody>
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18
From Demonstration to Field-Building: The James Irvine Foundation’s Linked Learning Initiative

Joan Bissell  
Director, Teacher Education/Public School Programs  
CSU Chancellors Office  
(Ex-Officio)

Gary Thomas  
Superintendent  
San Bernardino County Superintendent of Schools  
(Term Expires 2015)

David Stern  
Director  
College & Career Academy Support Network (CCASN) Center – UC Berkeley  
Professor of Education  
University of California, Berkeley  
(Term Expires 2014)

Angelo Williams  
Assistant Executive Director, Policy and Programs  
California School Boards Association  
(Term Expires 2014)

Anne Stanton  
Program Director for Youth  
The James Irvine Foundation  
(Ex-Officio)

April Treece  
Project Director  
Contra Costa Workforce Initiative, Contra Costa Economic Partnership (Term Expires 2014)
## Exhibit III:

### Youth Program | 2012 Priorities

<table>
<thead>
<tr>
<th>High School</th>
<th>Post-secondary</th>
<th>Out-of-School Youth</th>
<th>Seeding regional partnerships</th>
<th>Public Will</th>
<th>Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop plans to reach 50% of students across the District Initiatives by 2015</td>
<td>Develop implementation plan and launch community college linked learning demonstration with 3-5 sites</td>
<td>Develop out-of-school youth implementation plan for Bay Area and Los Angeles regions</td>
<td>Cultivate technical assistance providers in priority regions (Fresno, Inland Empire)</td>
<td>Strengthen strong broad-based coalitions in District Initiative districts</td>
<td>Align state funding to work-based learning</td>
</tr>
<tr>
<td>Ensure delivery of all four linked learning components in District Initiative, including work-based learning</td>
<td>Foster strong PSE/cross system demonstrations in promising regions and across key pathways</td>
<td>Build partnerships between existing District Initiative districts and regional hubs inInland Empire and Fresno</td>
<td>Seed cross-sector partnerships in priority regions</td>
<td>Seed cross-sector partnerships in priority regions</td>
<td>Preserve existing funding and leverage potential renewal to advance linked learning</td>
</tr>
<tr>
<td>Conduct study to determine true linked learning exists</td>
<td>Identify technical assistance provider to guide implementation</td>
<td>Develop PSE/district, industry alliances in promising regions</td>
<td>Develop multiyear plan to move linked learning Alliance to self-sufficiency and 501(c)(3)</td>
<td>Foster connection of to AB790 linked learning Pilot Program to District Initiative</td>
<td>Support rollout of Multiple Pathways Report 2648</td>
</tr>
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<td>Increase capacity of current or new technical assistance providers</td>
<td>Explore expansion for 2 new districts/regions (San Diego, Greater Sacramento)</td>
<td>Explore expansion for 2 new districts/regions (San Diego, Greater Sacramento)</td>
<td>Expand Alliance membership to better represent industry, parent, and student voice</td>
<td>Establish industry-based leadership councils to strengthen business (digital/media, law and justice/health)</td>
<td>Explore statewide pathway certification</td>
</tr>
<tr>
<td>Establish model linked learning teacher prep program at CSU Long Beach</td>
<td>Expand to 3-4 additional Cross by 2015</td>
<td>Expand to 3-4 additional Cross by 2015</td>
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Exhibit IV:

On the path to SUCCESS

By combining real world experience and rigorous academics, Linked Learning is improving education for students in California and beyond. To learn more, visit linkedlearning.org

High School

- Linked Learning students earned an average 6.6 MORE CREDITS in 10th grade than similar peers
- 95% of 12th-grade students in California Partnership Academies, which practice a form of Linked Learning graduated, compared with 85% of 12th-grade students statewide

Colleage

- 8.9 PERCENTAGE POINTS MORE likely to be on track at the end of 10th grade to complete the A-G requirements, which are needed for admission to both California public university systems
- 72% of Linked Learning students agree: “I know a lot about college and career planning.”

Career

- Linked Learning students reported improvement in specific professional skills. When compared with their peers:
  - +23 PERCENTAGE POINTS
  - +20 PERCENTAGE POINTS
  - +14 PERCENTAGE POINTS

Compared with their peers:
- Linked Learning students were more likely to report that high school prepares them for working with people in professional settings, and for working in a group to achieve a shared goal
- Linked Learning students were more likely to report improved presentation skills
- Linked Learning students were more likely to report improved ability to conduct online searches to answer a question

For more information, visit linkedlearning.org/impact.