NEW MEXICO STATE LIBRARY

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New Mexico
Adult Literacy Provider Study

State Library Administrative Agency
Department of Cultural Affairs

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the evolution of evaluation

New Mexico Adult Literacy Provider Study

Executive Summary

Many politicians and economists consider low literacy and education levels to negatively impact New Mexico's economy among other important variables. With an estimated 700,000 New Mexico adult residents reading below 6th grade level, New Mexico does not attract higher paying jobs requiring higher skill levels, which keeps tax revenues at low levels per capita. Perhaps more concerning, these adult residents confront stigmatizing conditions exposing them to social disapproval or shame as a result of their low literacy skills. Encouraging adults to engage in literacy programs is an arduous yet delicate task. The New Mexico Coalition for Literacy (NMCL) came into existence in 1987 for that very purpose.

This study began broadly using data from a sample of sites supplemented with interviews and surveys from a sample of participants. As the study progressed, evaluators found challenging obstacles to collecting essential data elements. As a result, surveys and interview data produced a significant portion of results that follow. The evaluation accessed information from one urban and two rural sites, and depended on the various sources for information including interviews, data file analysis, and surveys.

The NMCL was founded by New Mexico's former First Lady Katherine Carruthers and receives funding from the New Mexico Legislature through the Department of Cultural Affairs state Library Division. The mission of the NMCL is to coordinate, expand, and enhance New Mexico programs so adults can read and write to achieve their goals (http://newmexicoliteracy.org/ May 2013). The State Library, under the Department of Cultural Affairs, commissioned the following report collaboratively with NMCL to determine who the NMCL serves, the type of instruction offered in adult literacy programs, and data that should be collected in the future for accountability purposes. Fourteen sites currently operate around the state with funds, training and material support from the NMCL.

In 2014, 1,007 participants received services by literacy organizations (all sites), and 79% were women. As part of the evaluation, only one site provided any ethnicity data showing most adults identified as Hispanic or Latino. Interestingly, collecting demographic information will cause some participants to refuse services, continuing the destructive stigma. Adults sought services to improve their reading, learning or speaking skills in English, attaining a GED, developing writing skills, and to better support their children's education or communication with school personnel. Sites carefully manage stigma reduction to engage participants in programs.

Contents

Introduction

Increasingly legislators ask for evaluations of programs they fund, so they can learn from program successes and continue providing support. Additionally, such evaluations serve to ensure that programs are carried out as planned. The accountability aspect of such legislative perspectives follows a desire to responsibly distribute limited taxpayer resources. Former First Lady Katherine Carruthers founded the New Mexico Coalition for Literacy (NMCL) in 1987 and receives a legislative appropriation through the Department of Cultural Affairs, State Library Division. The mission of the NMCL is to coordinate, expand, and enhance New Mexico programs, so adults can read and write to achieve their goals. The NMCL provides funding, training, and technical assistance to local community based adult literacy programs statewide. These local programs, in turn, provide literacy instruction to adults who want to improve their literacy skills. While sites working with the NMCL depend on legislative funding, they collect additional donations.

The State Library, under the Department of Cultural Affairs commissioned the following report. Several evaluation questions guided the work. Those questions follow three themes:
1. Who is being served?
2. What instruction is offered?
3. What data should be collected for accountability and evaluation purposes?

While this report answers specific versions of these questions, the study begins with a description of complexities of providing adult literacy instruction because interpreting all results requires that background knowledge.

Upon designing this study, planners expected to conduct an empirical study with qualitative components. Conditions in the field limited this ability for two reasons. First, although data systems at each site allow for daily operations, site staff were unfamiliar with data transfer for analytic purposes. Second, privacy protocols varied from site to site requiring the study to accommodate variability in the amount of data available. Therefore; results that follow depend more heavily on qualitative research than planned.

Methods

This evaluation sampled sites as specified by contract where one urban and two rural sites participated. Evaluators accessed information from seven sources: an interview with the NMCL executive director, interviews with site directors, data file analysis, anonymous surveys of participants and tutors, interviews with participants and tutors. Four college students participated in a 1.5 hr training to prepare them to administer a telephone survey that took place over a two week period. Additional method details can be found at the end of this report. Counts of participants in this report may be from the 2014 annual report of all sites or from the three sample sites of the 2014-15 program year and specified in text.

The Setting

The Workforce Investment Act (WIA) of 1988 and the recent Workforce Innovation and Opportunity Act (WIOA) of 2014 fund programs operated in New Mexico and other states. Both WIA and WIOA include Title II, the Adult Education and Family Literacy Act (AEFLA), that creates a partnership among the federal government, states and localities to provide, on a voluntary basis, adult education and literacy activities. In recent years, the AEFLA required states to provide at least a 25% match to supplement the federal funds received under AEFLA. New Mexico designated the Higher Education Department to administer its AEFLA funding and programs and has provided more than this minimum required match of state funds. Eligible local providers compete for funds to operate programs providing these educational services.

The states, the federal government WIA and WIOA, and NMCL network programs report numbers of adults from the target population who are served by adult literacy programs each year. For the 2010-11 program year, the latest for which data are available, WIA adult education programs served 21,466 adults in New Mexico. This compares with 1,007 adults served by programs in the NMCL network (all sites) in the 2013-14 program year. The overall demographic composition of the learners served by the NMCL programs is similar to the learners served by the WIA programs. However, later this report shows important differences remain with regards to previous educational experiences and response to stigma.

The range of services and the types of goals provided by the NMCL and WIA programs in New Mexico are generally similar. Naturally, there is more concentration of basic literacy and English as a second language (ESL) skills in the community-based and volunteer programs within the NMCL network. Participants in NMCL programs have personal goals that parallel academic goals, but resist traditional academic testing outcome measurement. The NMCL (2014a) year-end report contains details of these service and goal attainment profiles. While other important programs provide literacy services, NMCL member organizations serve individuals unlikely to use services funded under WIA or WIOA.

This report describes NMCL organizations that operate programs outside these federal funds. The NMCL receives other state funds (but not federal AEFLA funds) to assist local community-based organizations provide literacy services to adults. Additionally, all organizations receive contributions from private sources. A description of those private contributions exceeds the scope of this report.

Structure of the Program

First Lady, Katherine Carruthers developed this literacy program in 1987 as a response to public concern over low literacy rates in the state. Common interpretations of these
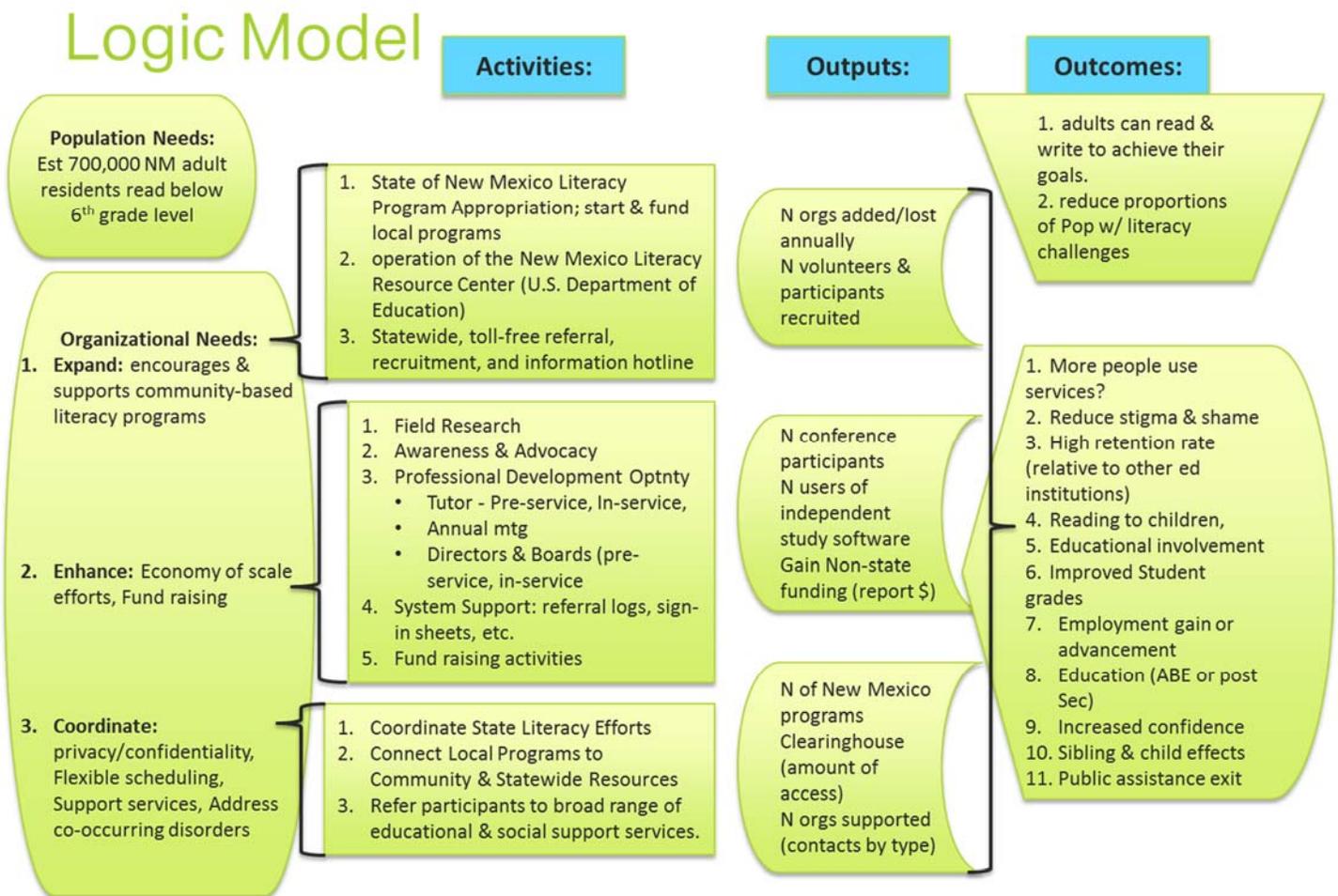
low literacy rates are that it keeps the state from attracting higher paying jobs, and thus keep tax revenues at low levels per capita.

Evaluators use a logic model along with other sources to determine cause and effect relationships, programmatic assumptions and expected results. Often program staff appreciate these images because they have built programs one piece at a time, and they developed connections intuitively. Logic models rarely provide new information to program staff, rather a validation of their working theories.

The logic model in Exhibit 1 shows cumulative effects of program activities that sum to a multitude of outcomes. Think of an hour glass shape, with the top end acting as a funnel to produce spreading effects. The bottle neck would be the critical instructional activity. All other activities support the critical activity. The spreading effects begin with increased literacy skills and expand to family and the community.

Exhibit 1. New Mexico Coalition for Literacy

Logic Model

Activities:

Outputs:

Outcomes:

Population Needs:
Est 700,000 NM adult residents read below 6th grade level

Organizational Needs:
1. **Expand:** encourages & supports community-based literacy programs

2. **Enhance:** Economy of scale efforts, Fund raising

3. **Coordinate:** privacy/confidentiality, Flexible scheduling, Support services, Address co-occurring disorders

1. State of New Mexico Literacy Program Appropriation; start & fund local programs
2. operation of the New Mexico Literacy Resource Center (U.S. Department of Education)
3. Statewide, toll-free referral, recruitment, and information hotline

1. Field Research
2. Awareness & Advocacy
3. Professional Development Optnty
   • Tutor - Pre-service, In-service,
   • Annual mtg
   • Directors & Boards (pre-service, in-service)
4. System Support: referral logs, sign-in sheets, etc.
5. Fund raising activities

1. Coordinate State Literacy Efforts
2. Connect Local Programs to Community & Statewide Resources
3. Refer participants to broad range of educational & social support services.

N orgs added/lost annually
N volunteers & participants recruited

N conference participants
N users of independent study software
Gain Non-state funding (report $)

N of New Mexico programs Clearinghouse (amount of access)
N orgs supported (contacts by type)

1. adults can read & write to achieve their goals.
2. reduce proportions of Pop w/ literacy challenges

1. More people use services?
2. Reduce stigma & shame
3. High retention rate (relative to other ed institutions)
4. Reading to children,
5. Educational involvement
6. Improved Student grades
7. Employment gain or advancement
8. Education (ABE or post Sec)
9. Increased confidence
10. Sibling & child effects
11. Public assistance exit

What Services are Available?

Survey results in Exhibit 2 show a variety of reasons respondents reported for seeking services. This table shows the problem with some self-report question methods. Respondents suggesting they sought services to gain a GED, for example, likely needed to improve their reading and writing skills since program staff report redirecting participants to basic literacy instruction. Further, it's a different level of analysis to say you want to speak better English, than to say you want to gain citizenship.

Every response in Exhibit 2 describes improving the respondents reading and writing skills, but the reported reason sometimes indicate a condition prompting the goal. While learning English appears dominant, ESL serves adults with diverse educational backgrounds including skilled professionals from around the world such as doctors, engineers, and nurses who wish to improve their language skills before taking courses to earn

Exhibit 2. Reasons for seeking services

Reason	% of Answers
learn or speak better English	59
learn to read	15
develop writing skills	9
prepare to attain their GED	3
attain citizenship	3
better support their children's education or to be able to communicate with school personnel	3
address needs related to disabilities	3
get a better job	1
other reasons	2

their field's certification in the United States. Interviews revealed this pattern in the urban area while it is often agricultural workers in rural areas who seek additional literacy skills needed for more stable jobs. Native American participants also take advantage of ESL services. Those participants responding that they wanted to speak better English sought to improve their reading and writing to address personal goals and needs. Local program staff see all literacy impediments as within their mission to address. Further, they value the equity of providing those services to anyone who walks through the door. Aside from the social justice equity issue, how would ESL learners, denied that opportunity, engage in their community without some assistance? The alternative to engagement is isolation which recent events has highlighted as a major contributor to violence.

Who Uses Literacy Services?

Exhibits 3 & 4 show the distribution of females and males using service as estimated from available data files of the three sample sites. Most (79%) of participants are female. Females tend to seek services in a narrower age band than males even though the average age of female (39.9) and male (40.1) participants are similar.
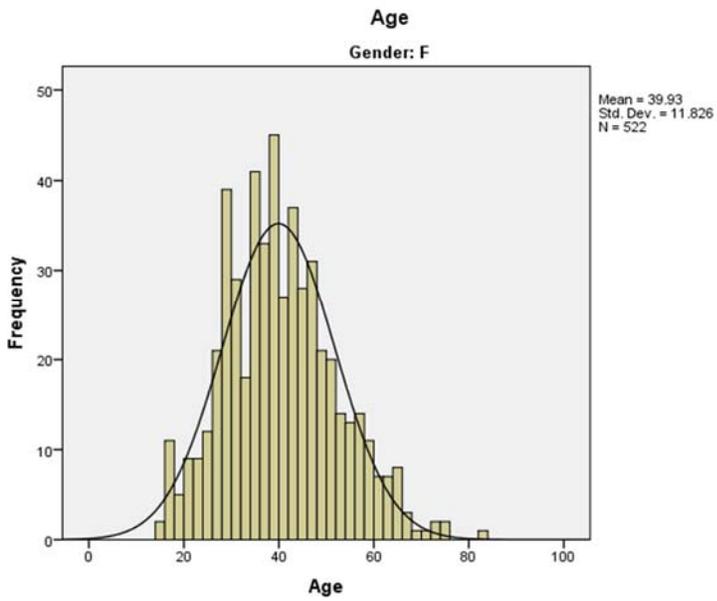
Exhibit 3. Female participants by age

Age

Gender: F

Mean = 39.93
Std. Dev. = 11.826
N = 522

Exhibit 4. Male participants by age

Age

Gender: M

Mean = 40.98
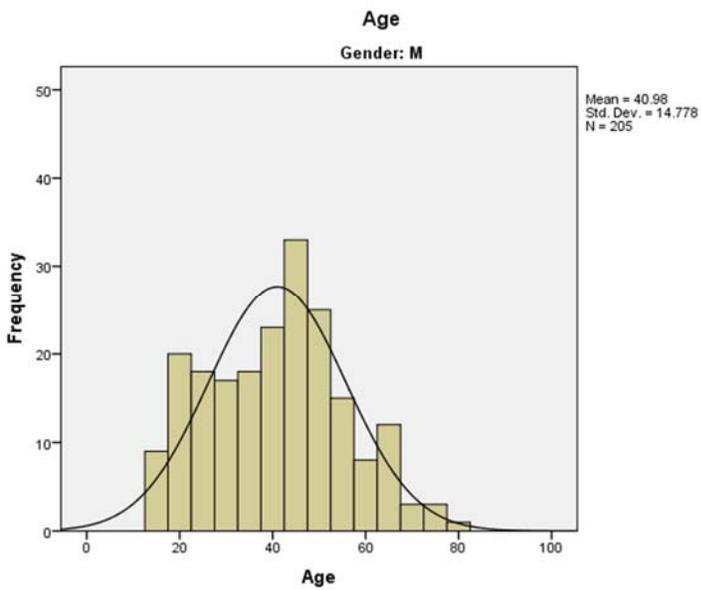Std. Dev. = 14.778
N = 205

Exhibit 5 shows that respondents often have children.

Exhibit 5: Participant respondents with children

Number of Children	Percentage of Respondent
No Children	20%
One Child	21%
Two Children	31%
Three Children	14%
Four Children	8%
Five to seven Children	5%

* Estimated from Participant Survey

The Role of Stigma

Literacy workers encounter many participants who are responding to stigma. Merriam Webster defines stigma as "a mark of shame or discredit", while Wikipedia calls it a "severe social disapproval of personal characteristics or beliefs that are against cultural norms." The cultural norm involved is an ability to read at some basic level of functioning or to speak standard American English. As such, the conditions leading up to a lack of those abilities have various consequences participants may wish to hide. Interviews with site directors, tutors and staff reveal careful planning and ways of interacting to limit participants' experiences of stigma. For example, program staff do not collect data on ethnicity or collect it in non-standard ways. Similarly, meeting places and times for participants and tutors must be carefully selected, so participants feel comfortable with the social context. Avoiding other high profile institutions like universities and social service agencies also helps these participants feel comfortable. One tutor spoke about the difficulty it took to get a participant to take a test at the local community college. It required months of conversation and a promise to accompany and wait while the participant completed the test. Another participant discussed attending a community college program where s/he felt humiliated because the teacher asked about the participant's ability in front of the rest of the class. The participant never returned to the class afterwards.

Stigma versus Participant Recruiting

While literacy centers' primary function is to increase literacy, they must recruit with a range of other services such as those shown in Exhibit 2. Sites creatively contextualize the literacy service within local participant needs. The two rural areas this study included had large agricultural employers, while the urban center attracted an international clientele. Each center also offered GED services, along with numeracy and computer skills. This breadth of offerings helps ameliorate the stigma of walking into or contacting a literacy center. Additionally, site directors set up clearly adult education environments

without a university or an elementary feel. These are respectful and challenging environments. While many participants are comfortable in these environments, tutors mention meeting off site for some students needing basic literacy. One tutor made arrangements at a church for their meetings. The tutor and participant arrived and left at different times so as to relieve any suspicions of locals.

A reasonable person might ask how a direct approach to recruiting might work? Exhibit 6 shows just such an approach. Young adults we classify as dropouts rarely self-identify as dropouts. This billboard would miss most of those it was designed to address. For those that may self-identify, they would not think "wow, I can't wait to hang out with the rest of the dropouts?" Or "those people really understand me!" Since they are young, others may be making decisions on behalf of them. This becomes a high stakes opportunity, where a student suddenly takes on a label s/he may not be proud of, and where failure would compound the shame and stigma. They would in essence become a double dropout. Literacy site directors carefully avoid stigmatizing the very individuals they wish to serve. They never communicate about stigma directly. It's a subtle way of doing business that is required on a daily basis or else the reputation suffers and the entire organization's reputation is put at risk.

Exhibit 6. What is wrong with this sign?

Another similar framework for addressing stigma in New Mexico is evident where school based health centers incorporate behavioral health services. There has always been stigma associated with receiving behavioral health care at a particular facility. Now that it is incorporated into a standard medical health center, students who go for behavioral health care can't be distinguished from those going for medical care. Similarly, literacy directors develop this one stop service model to draw clientele with the range of services they offer.

The Role of Personal Goals

Comprehensive reviews of theory and practice in adult education and development provide ample evidence of the diversity and breadth of learners' goals (e.g., Beder, 1991; Darkenwald, 1986; Smith, 2009). Beder (1991) reviews evidence showing need for programs to align their services with learner motivations and life contexts. MacDonald & Scollay (2009), who conducted a longitudinal study of tutoring pairs, found identity changes to be an integral part of the process of adult literacy development and that effective tutoring needs to help learners to address a broad, customized set of personal needs and goals. Interviews with learners and tutors in the present study also identify the importance of these identity changes and personalized goals. Neither the NMCL nor WIA programs, however, are expected to report on a broad set of goals from perspective of adult development and learning. Although it is unlikely that WIOA programs will substantially broaden either their mission or goal reporting, NMCL programs have the capacity through the close tutor-student relationships, to report at least on an anecdotal or case study basis, the breadth of learner development and goal attainment. The NMCL has used such material effectively in its latest case statement for providing adult literacy services (NMCL, 2014b).

Personal goals drive participants to search for opportunities to improve themselves. As seen above, participants attend for a variety of reasons. Site directors uniformly mentioned that educational goals derive from participant motivations. As such, test scores associated with literacy improvement take on less importance than they might in other educational settings. While participants expect programs to meet their goals, legislators may expect measurable improvements in reading ability. Outcome measures remain an essential part of all evaluations. Using test scores as a principal outcome measure misplaces the focus of literacy interventions on a peripheral measure of the actual intended outcome – goal attainment. Methods called goal attainment scaling have decades of development and fit this context better than other outcome measures.

Reframing the Conversation

Reframing the conversation around building social inclusion for disempowered individuals may emphasize having what site directors' call providing stepping stones. While good grammar or even logic might require describing a stepping stone as having a starting point and a destination, the site directors realize that leaving out sociological descriptions of programmatic theory of change empowers their participants to come for help and to receive it. It is never about "what we can do for you" and always about what participants can do for themselves.

On site, directors build systems and train staff and tutors to meet participants where they are at. This engagement method has worked for decades and allows participants to access services at their own readiness level. Many participants arrive on site with simple goals like gaining a GED and tutors build a plan with smaller steps to reach that

goal. For example, tutors would work on basic literacy ahead of further preparation for taking the GED exam.

Demographics of the Population Served

Last year, 1,007 participants received services from all sites. Of the total, 281 were Basic Literacy native English-speaking, 202 were Basic Literacy non-native English-speaking, and 424 were English as a second language learners. The reader will notice that the three categories above add to 907. Field staff at different sites use different definitions for the different services, so subgroups do not add properly. Throughout this report, evidence will begin to accrue that common data collection elements need to be in place. This is the first example of that necessary collaboration.

The three site sample of data collected showed a one year average of 247 among the three sites. Exhibit 7 shows how the number served by all 14 sites can vary across years. The drop in participants served appears to result from severe funding inconsistency.

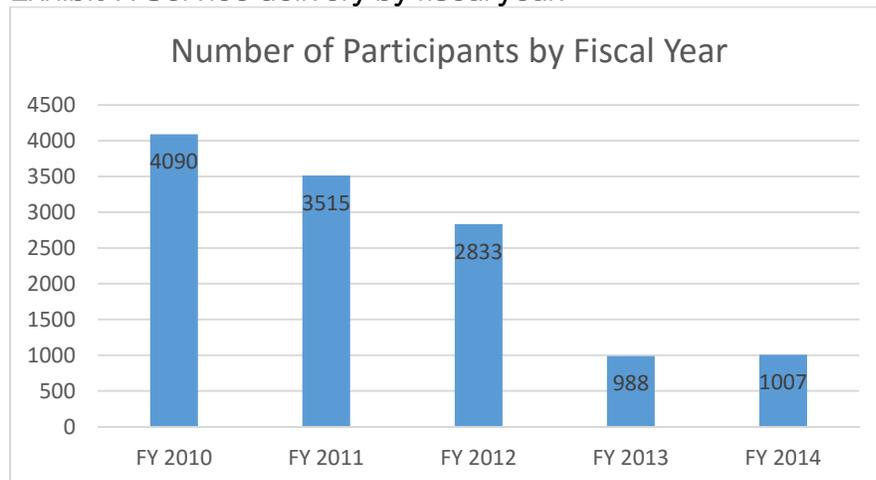Exhibit 7. Service delivery by fiscal year.

Exhibit 8 shows how a 55% funding cut impacts services and costs in a lagged fashion. While the number served begins to drop as funding drops, sites had enough budgetary strength to compensate for the first 55% budget cut (FY 2012). The second year of the 55% funding level (FY 2013) shows a massive decline in service. While funding increased in 2014, infrastructure damage had been done, and recovery lags funding increases. While infrastructure means tangible things like books and copiers, the biggest impact is in loss of tutor training and disruption to the tutor pipeline. Program staff in the field speculate that potential participants hear that the waiting list is too long, and conclude there is no use getting in line.

There is evidence that service numbers have begun to increase in the current budget year, but final numbers are not available at this writing. It is highly likely that as funding stabilizes costs will decline as program staff begin to rebuild programmatic efficiencies. The reader may be tempted to consider requiring diversification of funding sources as a means of stabilizing funding. Communities with the highest need are likely to have the least ability to raise their own funds.

Exhibit 8. Appropriations, Participation and Costs

Relationship between Appropriations, Number Served, & Cost per Participant
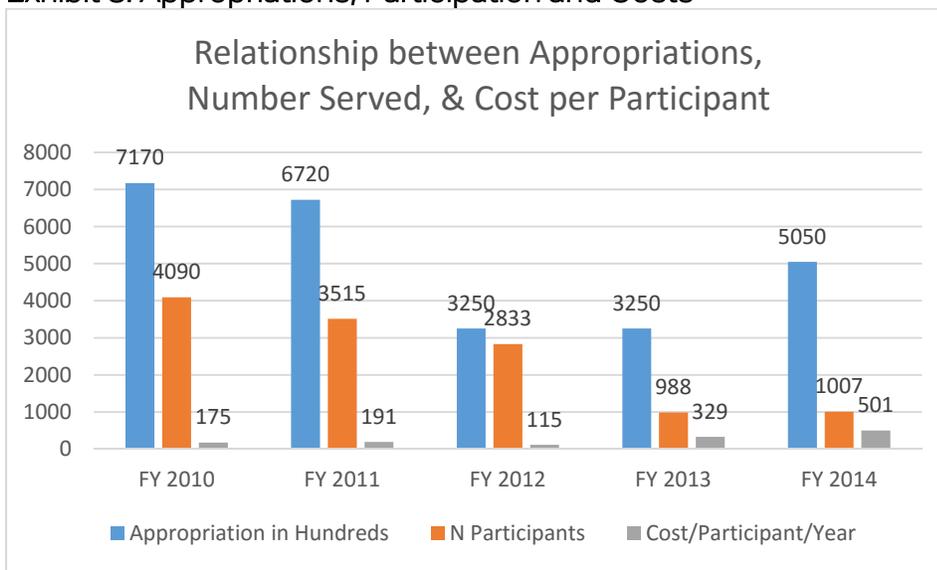
Only one site provided ethnicity data the evaluator could access. Exhibit 9 shows the proportion of Hispanic and non-Hispanic participants at one site. Collecting demographic information will cause some participants to refuse service. A two stage intake process where tutors gather information after establishing a trusting relationship with the participant may solve that problem. The NMCL would organize the collaborative activity required by site level staff to build the common operational data collection policy.

Exhibit 9. Estimates of Ethnicity*

Participant Ethnicity
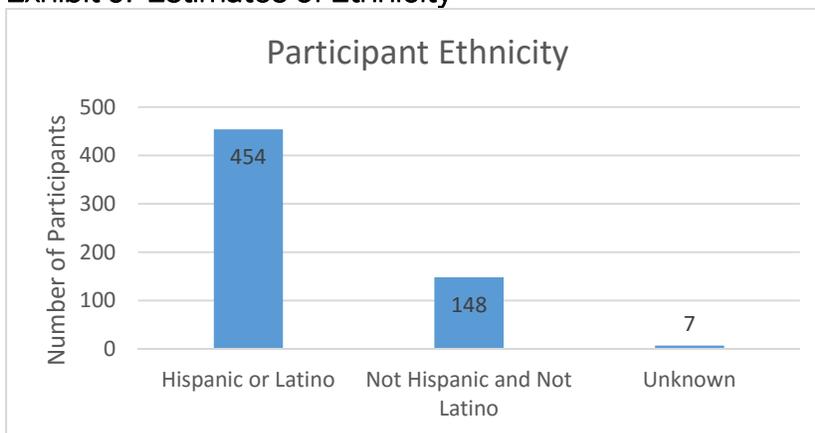
* Data from one site only

The participant survey gathered data about current and previous employment. Exhibit 10 shows employment categories respondents provided. Due to missing data, only 58 participants provided responses to both "before" and "current" employment survey questions. Of 58 respondents to both questions, 10 individuals (17%) clearly improved their job status (not shown in Exhibit 10).

Exhibit 10. Self-reported employment before services and current. (% Students)

Type of Employment	Before Program	Current
unemployed, disabled	32	38
cook, cafeteria worker, dishwasher	15	11
service work (e.g. school employee, beautician, elder care)	12	9
homemaker	12	12
manufacturing and trades work (including farm worker)	8	3
retail, customer service, clerk	8	8
house keeper, cleaner	5	6
supervisory/managerial or specialized work)	3	9
self-employed, odds/ends, day labor	3	3
retired	2	2
Total Responding Students	**60**	**66**

Anyone who thinks about this service deeply, will realize the literacy programs around the state serve a population of individuals at the lowest end of the socio economic scale, and often of minority status. Literacy services impact job status as well as life goals such as earning a GED or gaining citizenship. These are entry points to stepping up to better opportunities. Site coordinators and tutors alike discuss redirecting participant goals that address basic literacy on the way to meeting these important and understandable personal goals. Redirecting goals means setting up smaller attainable goals that sum to the larger personal goal.

Potential Barriers

Barriers to instruction fall into three major categories; life interruptions, tutor - student compatibility, unidentified and/or un-remediated cognitive challenges. Most of the participants in these programs live at the lowest end of the earning spectrum. Their lives are often chaotic with interruptions most readers of this report can only imagine. Frequently reported interruptions include health challenges such as diabetes, blood pressure, deaths in the family, jailed family members, frequent moving of residence, job changes, unexpected travel, etc. While we may think that any one of these is commonplace, program participants may experience several at a time for months on end. When life calms down enough, participants engage or re-engage in the program. These chaotic conditions make tutors and program directors reluctant to discuss attrition. Many students "take a break" and re-engage some months later. Never the less, information about the period and duration of engagement is critical to describing

the flow of the instructional experience and the learning trajectories of the participants. This participation pattern is found throughout adult education (Reder, 2014a).

Directors carefully manage tutor and student compatibility. Perhaps their years of experience play into the matching, perhaps high levels of social emotional skills, perhaps training from the NMCL, or perhaps it is frequent checking in with matches (often at 6 week intervals) that make this critical feature apparently successful. Interviews revealed an occasional mismatch that needing adjusting, but these re-matches tended to occur early in the participants' learning path, so they did not became discouraged.

Un-remediated cognitive challenges pose another serious set of challenges for programs. First, it's not known what percent of participants would have these challenges. Second, diagnostic instruments are expensive and require highly trained staff to administer them. Third, even when tutor and participant can identify cognitive challenges, effective remediation methods may be difficult to find. If they were readily available, the challenges might have been addressed already.

One implication for students with potential cognitive challenges has to do with previous or new labels that the student may have heard with reference to their own functioning. A huge body of literature over three decades shows detrimental effects of such labels. Motivating students in these contexts can be challenging for tutors.

Beder (1991) and Darkenwald (1986), as part of their broad reviews of adult education, examined adults' patterns of participation in programs. Reder and Strawn (2006), followed students over long periods of time and saw their participation often consisting of multiple short periods of attendance, fragmented over time, sometimes across multiple programs. Belzer (1998) argued that these students are better understood as "stopping out, not dropping out" of programs. Persistence of participation was thought to be both difficult to achieve and essential for successful learning. Comings and colleagues studied persistence in both adult basic education and tutoring programs. They conceived of participation as the byproduct of positive and negative field forces acting on the individual, some forces attracting students into programs, others posing barriers to their continued participation. They suggested specific interventions that might help students build persistence of participating in programs (Comings, 2009; Comings, Parella & Soricone, 1999).

The NMCL (2014a) reports over half of students are active and had participated in previous program year, consistent with multi-year patterns of participation in basic skills programs reported in the research literature. This also fits with learner interviews conducted in this study about participation and persistence.

Basic Accountability Requirements

Accountability reporting driven by legislative and funding sources would require a common data system. Further, it would require minimal demographic information (e.g. age & gender), specific program participation descriptions, and outcome descriptions. Using highly descriptive demographic information will alienate potential participants due to stigma and privacy concerns. Specific program descriptions will require standard language usage across sites throughout the state. A common information system with embedded and accessible operational definitions would help, but the NMCL would need to provide annual training to keep data entry accurate and results meaningful. Outcome descriptions would include the Test of Adult Basic Education (TABE) and English as a Second Language Oral Assessment (ESLOA), in addition to custom goal fields with historical update reporting capability and summary progress fields. Custom goal fields would allow for monitoring of task specific progress such as reading the new job related material a participant may have been faced with. Keeping a historical record of these goals would allow monitoring progress on specific learner goals as well as skill gains on testing instruments for more advanced or academically successful students. Exhibit 11 shows a summary of basic accountability elements.

Exhibit 11. Types and examples of elements of basic accountability reporting

Demographic Information	Specific Program Participation Descriptions	Outcome Descriptions
Age (initial intake)	Personal goals	Goal attainment scaling
Gender (initial intake)	Instructional Paradigm (e.g. Basic Literacy, Adult Basic Education, ESL, etc.)	Performance measures (e.g. ESLOA & TABE)
Ethnicity (delayed intake)	Materials description	Employment status & job title on exit (or on change)
Language (delayed intake)	Hours met (participating)	
Employment status & job title (delayed intake)		

This report suggests a follow-up or delayed additional intake activity where program staff can gather additional demographic information after building trust and rapport. Without such a plan, basic demographics will always appear impoverished and detailed early intake versions may have the effect of alienating potential participants.

Measurement Instruments Required for Measuring Accomplishments

Program accomplishments come in different classes: diagnostic progress (to focus teaching efforts); basic literacy progress (overall functional skills); and auxiliary - such as ESL, GED; and goal attainment. Program staff collaboration and discussion could produce a common logic model that allows for accurate reporting with shared definitions.

For basic literacy, sites in the study currently use TABE at various intervals and times. While a new instrument available to the public is under development, it is not available yet. Any common information system will have the features to include multiple assessments. The field staff at sites in the study have standardized on these two instruments for now, and the NMCL continues to support both of them. This will be a primary academic measure, but likely only applicable to a portion of the population.

Program staff must also measure auxiliary service goals such as GED, ESL and Citizenship. These are likely to be a culmination of some of the work above. As such, it will also only apply to a portion of the population that has managed to remain engaged over the course of the above programs. These are the attractions for participants to visit the center and they must have their own measures.

This report suggests an umbrella goal attainment scaling approach to organizing the breadth of measures required for reporting. It should be possible to develop a system where goals are identified and then steps along the way are measured while monitoring the ultimate goal. Site staff would collaboratively develop the system with evaluator facilitation. They would discuss a progression from various beginning points and then fit them into a larger picture. Goal attainment scaling would require rubric development where field staff provide critical input and system testing. This development would simplify and standardize reporting such that progress toward goals could be measured at any point in the process regardless of the initial identified goal.

Two other elements may be useful: satisfaction evaluation instruments and self-efficacy instruments. While these types of tools have inherent challenges, they do provide an opportunity to discover information program staff would not normally have access to. The NMCL would need to develop some evaluation capacity for regular reporting of this sort of data.

Outcome Measures

For program evaluation purposes, the NMCL should consider gathering two sets of measures: program implementation and program outcome. For program implementation, measures of participation in types of program is essential. Additionally, hours of participation in each program allows for advanced evaluations that address effectiveness. Finally, descriptions of methods will help with fine grained analysis. These descriptions must be qualitative by nature, as tutors often avail themselves of their own resources. Further, they must be brief, or risk not getting the information at all due to an over burden on data entry. A data system may be able to make common descriptions into check boxes that would ease the reporting burden.

For program outcome measures, the primary measure should be goal attainment. As tutors break down goals into obtainable sub goals, they will identify additional measures with more traditional measures such as the TABE.

Summary of Essential Reporting Measures
1. Measures of participation in types of program
2. Hours of participation in each program
3. Descriptions of methods
4. Goal attainment
5. Sub goal attainment (performance measures minimum of three, but optimally five or six)

State Costs per Student

Costs to the State must be considered at multiple levels in addition to the legislative appropriation which has varied 220% from high to low over the last 5 years. Such funding variation seriously impacts the scope and scale of participants the programs can serve.

Decision makers must consider facilities costs. Two sites in the study receive reduced rate (cost per square foot) at less than 30 cents per square foot. At the time of this writing, office space in Albuquerque goes for over $14 per square foot with the cheapest rates observed at $7 per square foot (http://www.loopnet.com/New-Mexico/Albuquerque_Office-Space-For-Lease/). Without unusual rental opportunities New Mexico Literacy organizations would lose more of their appropriation to facilities. These rates are possible in two sites because of depressed economic conditions which required city government contraction. As economic conditions improve, these facilities are likely to be required for government service expansion. The NMCL, local sites and legislators need to plan accordingly to avoid an interruption in future services.

While it is common to ask about return on investment in business contexts, similar questions become quickly complex in social contexts. Cross generational impacts of participants' learning on their children are difficult to measure. A large percent of participants have children (Exhibit 5) and grandchildren who likely benefit from their participation. Further, these organizations provide a critical avenue for schools to engage with parents they might otherwise fail to engage. Educators across the state clamor to increase parental engagement as one method to increase student educational outcomes. Costs associated with low educational outcomes accrue in terms of youth who may turn to crime or otherwise fail to contribute to the tax base. Indeed, one participant interviewed told the story of turning to crime as a youth.

Other direct societal benefits accrue as participants gain better employment and contribute to their communities. One participant had joined the volunteer fire department and while this is only a single example, it demonstrates how difficult assigning return on investment values can be in these contexts. Assigning value to giving back to the community can be done when known, but only fractions of participants stay in touch with program staff on a regular basis.

Imagine the alternative to offering these opportunities to increase societal participation. What activities and burdens would society face? Increased dependence on social services and increased crime and incarceration? Whether domestic or foreign born, the rise of terrorism can be traced to social exclusion or alienation. The savings associated with mitigating these risks in an open society have never been enumerated, but the costs of such acts are quite well known in dollars and even more in human suffering.

Costs to the State per participant per year in the most recent year data is available are $501 (Exhibit 12). Because of the condition of data it is impossible to convert cost to dollars per grade level improvement. While there is no direct evidence explaining the recent rise in cost, there is unconfirmed evidence that costs have dropped this year. Costs dropping this year would indicate infrastructure rebuilding has begun to taper off.

Exhibit 12. State costs per participant per year.
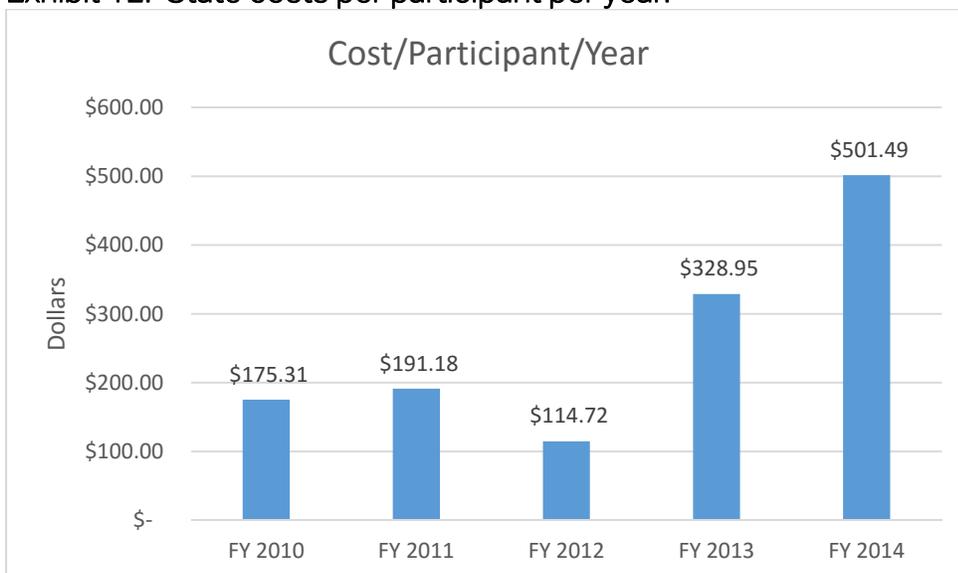
Existing Educational Structures

This report does not intend to deride any current educational systems. While it may appear as if educational systems had failed some participants, two of three interviewed said they did not blame any other systems. One participant said that they were a bad fit for the public school. That participant lost his/her father at a young age and turned to the street for attention. Schools aren't set up to address those sort of issues.

Other examples mentioned include the intimidating nature of universities and community colleges as program settings for these participants. Again, these are participant perceptions and not necessarily institutional failures. Universities are not designed for everyone, and community colleges serve broad swaths of the population. The population taking advantage of literacy services has just been a poor match for the

university, community college, and public school systems. The literacy organizations around the state address this under-served portion of the population to a small extent.

Data and Site Familiarity vs
Large Scale Access

While this report documents difficulties accessing data within site level databases, more rigorous studies would require data in a form program staff have little experience with. Therefore, program staff likely access data on an individual level that the evaluator could not access due to lack of system documentation. That is, site staff manage to get their job done on a daily basis. Gathering data for a rigorous evaluation required unusual access to data that program staff were not familiar with.

State Accountability Challenges

Governmental agencies have increasingly ceased providing services and become contract managers for other organizations providing services. While this collaborative approach reduces costs to the State and shifts responsibility to communities, there are tradeoffs regarding control of mission and implementation processes. The relationship between the State of New Mexico as a funder and the NMCL requires that monies "flow through" to other local organizations that are answerable to their own boards. Additional complexity arises in this flow through context. The NMCL establishes operational policy, for example, by providing sample intake documentation, providing tutor training, promoting operational standards, and providing board training. Local organizations depend upon and appreciate this support. When NMCL serves as a contract manager with accountability requirements and implementation support functions, role conflict may arise between State, support agency, local organizations.

Contracting and accountability cautions could include appreciating (measuring) local variability in services and participants, avoiding high stakes accountability, and allowing for local mission specific goals and activities. Conceptualizing reporting as descriptive information gathering ensures accurate and informative data for policy decision making.

Instructional Approaches

There has been a fair amount of research on instructional practices in adult basic education and English as a second language classrooms. Purcell-Gates, Degener, Jacobson & Soler (2000) followed numerous classrooms over time and found that the extent to which teachers engaged students in using authentic literacy practices from their everyday lives was related to the measured growth of students' engagement in literacy practices outside of the classroom. Reder (2009a) conducted a long-term longitudinal study of target adult population, and compared those who attended

programs with those who did not. He found that programs had short-term impacts on adults' everyday uses of literacy but not on their short-term literacy proficiency scores. Later analyses showed that program participants' short-term gains in literacy practice engagement transform over time into longer-term gains in their assessed literacy proficiency (Reder, 2009b) through a mechanism called practice engagement theory (Reder, 1994, 2013; Sheehan-Holt & Smith, 2000; Smith, 2009). An important implication of this research is that adult programs, including tutoring programs, could focus on helping students engage in personally meaningful literacy practices (e.g. those associated with their goals) that would persist over time and facilitate the ongoing growth of literacy proficiency long after students leave the program.

Alamprese (2009) conducted large scale observational studies on adult basic education classrooms and Condelli, Wrigley and Yoon (2009) on ESL classrooms. Both the Alamprese (2009) and the Condelli et al (2009) studies attempted to find correlational relationships between the occurrence of a range of instructional practices in the adult classroom and changes in students' assessed cognitive and noncognitive skills. Large random controlled trials (RCTs) experimentally contrasted the effects of specific instructional approaches on a range of student learning outcome measures (Alamprese, Arthur, Price & Knight, 2011; Greenberg, Wise, Morris, Fredrick, Nanda & Pae, 2011; Hock & Mellard, 2011; Sabatini, Shore, Holtzman & Scarborough, 2011). There were relatively few systematic conclusions from these large scale studies that provide clear guidelines to the field about the relative effectiveness of different types of instructional practices, perhaps because of the short-term nature of the time period over which changes in outcome measures were assessed, which as seen above, may not capture the long-term impact instruction has on literacy development (Reder, 2014b). Although there is not space here to go into the details of these many studies and their findings, broad reviews are available elsewhere (Kruidenier 2002; Lesgold & Welch-Ross, 2012; Venezky, Oney, Sabatini & Jain (1998). An important caveat to this overview is that almost all research on instructional practices in adult literacy has been conducted in classroom rather than 1-1 tutoring sessions (Belzer, 2007).

Sites discussed two common patterns of instruction one to one tutoring and group classes for ESL contexts. Program staff checked in with both learners and tutors to assure a constructive working relationship. That means that a learner may be assigned a different tutor to improve outcomes. Group ESL and citizenship settings were practical because shame was less of a barrier. This group configuration makes ESL instruction significantly more cost effective, although that level of instructional detail was not available to develop cost estimates.

Key Relationship between Tutor & Learner

Interviews in this study with program directors, tutors and learners alike identified the central importance of the tutor-learner relationship for learner and program success. This is consistent with research on the tutor-learner relationship in adult literacy programs. MacDonald & Scollay (2009) studied tutor-learner interactions over time in a

California library literacy program and found the identity changes in adult learners to be a key aspect of their literacy development. Effective tutors developed close relationships with their learners and helped them to meet individualized personal needs and goals. Pendell, Withers, Castek and Reder (2013) also found the tutor-learner relationship to be a key factor in digital literacy acquisition within economically vulnerable adults being served in diverse community-based programs.

Belzer (2007) reviewed research on 1-1 tutoring of children and adults and discussed key relational issues as well as issues of culture; power and control of knowledge are constructed within the tutor-learner dyad (Pomerance, 1990; Ziegahn & Hinchman, 1999). She notes that much of the research literature on tutoring focuses on what the tutor learns in the process, not just on the learners' outcomes (Ilsley, 1990; Ziegahn & Hinchman, 1999). Spreadsheet data backing up the NMCL's annual report for program year 2013-14 reflect an overall matching of tutors and learners in terms of gender and race/ethnicity, consistent with the importance placed on such matching by each individual interviewed in the study.

The Volunteer Requirement

The volunteer nature of the work is deeply engrained since inception. The NMCL requires grantees to use volunteer tutors in order to receive funding. The voluntary nature of the associated workforce ensures the State's investment brings the largest return on investment. Tutors participate in a full 18 hours of training before beginning to work with students. The nature of this tutor work differs fundamentally from classroom teaching in approach to student, lesson plan, activities, and delivery. This commitment to volunteer tutors impacts every aspect of the program, from availability of staff, to ability to build trusting relationships that foster success. While paid staff could conduct this work in other contexts, one participant observed they "…had experience with paid teachers and they did not work for me." The volunteers manage an approachability this segment of the population requires. Although data were not available from sites, the survey indicated that 70% of tutors volunteer for two or more years. Some of those as many as seven years.

Need for Tutor Professional Development

The importance of tutor training is mentioned throughout the program staff and tutor interviews conducted in this study. The extent of this tutor training is documented in the NMCL annual report (2014a) and backup spreadsheet of data. The NMCL reports offering 18 hour training sessions. Field staff and tutors confirm receiving that training and comment on its importance for their success. Belzer (2007) has studied the professional development of adult literacy tutors and recommends that most tutor training, typically offered up front before tutoring actually begins, should actually be offered on a "just in time" basis, so that tutors needing information about how to work on particular literacy issues or how to work with learners who have particular challenges or needs can access the appropriate information and training as they need it. The U.S.

Department of Education has recently released a series of free online trainings for tutors that can be delivered and used on a "just in time" basis. More information about this free "Tutor Ready" training can be obtained here: www.ed.gov/edblogs/ovae/2014/12/09/supporting-literacy-tutors/

Conclusions

The NMCL and associated sites provide a valuable service likely to have positive economic consequences for the state in terms of
- boosting the labor force to higher earning levels for participants,
- likely better educational outcomes for their children,
- Maximizing state investment – the small investment the State offers is compounded significantly due to the volunteer nature of the services offered. Essentially, the State pays for a portion of the infrastructure required to operate the centers and reaps benefits from work of a legion of volunteers throughout the state.

Every aspect of this work involves managing stigma. Recruiting, intake, tutor selection, scheduling, and instruction all manage stigma reduction in order to effectively engage participants.

- other existing and popular organizations could not accomplish the work due to an interplay between stigma and the reputations of the other organizations.
- Universities, community colleges, and school districts certainly play an essential part (to a degree not studied here), but will always miss a portion of those requiring literacy services due to stigma.

While the condition of data suffices for minimal contracting requirements and for daily operations, it does not meet statewide accountability functionality.
- Common reporting elements such as age and gender were not available.
- Privacy concerns play a significant part in data availability as well.
- Site staff exhibit significant excitement about the possibility of having a common management and reporting platform. Site staff are willing to negotiate many items in exchange for improved reporting.

Participants drive their own outcomes in this context. They have goal specific reasons for seeking assistance that often intersect with literacy. The resources and training NMCL provides site-staff offers key infrastructure, training and materials that supports participant goal attainment. Participants express gratitude to tutors and organizations for the opportunity to improve their skills.

Tutors exhibit the best of American and New Mexican citizenship, working only for the joy of helping a fellow citizen reach their next goal. These tutors express a long term commitment and patience required by the participants. One site director said that

Tutors only get paid with site staff's interest in hearing about tutor successes. Future evaluations should be able to estimate the amount of free labor the State receives for their investment.

Recommendations

1. Any system level decision must consider stigma or risk losing the population it serves.
    - State level policy making focused on accountability must be informed from the field or risk unintended consequences with the population served and the local organization leadership. The NMCL carries out operational policies following extensive consultation with its members. This model ensures continued engagement with the population served.
2. NMCL may consider adopting a data management system with licenses for member sites. Such a platform will standardize language around services and has the potential to solve many reporting challenges. This would include engaging site staff in:
    - Standardizing data collection elements
    - Considering more appropriate outcome measures such as goal attainment scaling
    - Adopting a few process oriented indicators that each site can use to monitor their own activities.
    - Building consensus for privacy management.
3. NMCL may consider conducting a statewide needs assessment to learn how to broaden their appeal to basic literacy learners and to more accurately identify the needs of rural and urban ESL participants as well as Native American learners.
4. The State must stabilize funding to establish improving literacy as a priority. Incorporating funding into regular budgets may help to some degree. Incentivizing community contributions may help as well, if it can be done with regard to community needs and equity. Such incentivizing should be monitored annually until equity is established.

Method Notes

This report used data from numerous sources to generate findings. This section describes data collection efforts.

Interviews: The project began by developing the logic model from an interview with the NMCL executive director. A State representative reviewed that logic model to establish the shared understanding of the work. While there are 18 local sites, the evaluator chose one urban and two rural sites NMCL and State leaders thought would be representative. Next, the evaluator interviewed each of the site directors using a standard set of questions (see Appendix). Additionally, the evaluator requested data

files to analyze demographic characteristics and to develop a list of participants to survey.

Data Files: Data files came in 2 different Access databases and a set of comma separated variable files. While tech staff can convert these files to compatible formats in theory, data received from one site failed to include headers and omitted common demographic data such as gender and age and provided no contact information. Upon meeting with staff to make the request, significant privacy concerns arose. In a second site similar concerns for privacy also arose. Although, sites can report basic data from their own data sets, amassing that data entails numerous concerns the first of which is privacy.

Another concern comes from variation in operational definitions of the services offered and ability to log services rendered over time such as hours of participation. Further, no data set offered the ability to accurately assess improvement on test results that each site reported they administered on a regular basis.

In order for NMCL to accumulate data from sites and address common accountability requirements, NMCL needs to solve some basic data collection issues. Two sections in the report name a minimum set of elements and suggest methods for simplifying reporting requirements.

Tutor and Participant Surveys: Participants and tutors responded to surveys. One site collected data from an existing class of participants, while the other sites provided contact information for phone calling participants. Two sites provided contact information that allowed emailing the tutor survey. The tutor and participant surveys can be found in the Appendix. There were 55 tutor respondents and 75 participant respondents.

Tutor and Participant Interviews: The evaluator interviewed three tutors and participants each to gather richer descriptions of their experiences. These standard interviews structured the discussion and can be seen in the Appendix.

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Appendix

Data Collection Instruments

Site Director Interview

Site Level Interview Question Draft

    a. What are the most important indicators of the success of your overall program?

    b. What are the biggest challenges your program faces?

    c. Describe your student process from recruitment to intake to exit
        i. How do you attract students?
        ii. Who refers students?
        iii. How do students find your program?

    d. Describe your tutor recruitment and intake process.
        i. How do you attract tutors?

    e. Describe the matching process for students and tutors.
        i. Do you see any patterns that predict successful or challenging matches?

    f. Name the features (resources/services/materials/tools) NMCL provides that you depend upon.
        i. Can you provide copies of training materials?

    g. Name the features (resources/services/materials/tools) NMCL provides that you appreciate.

    h. Are there features (resources/services/materials/tools) you need that are not currently available?

    i. How do you store your intake and performance data?
        i. How far back does it go?
        ii. Does it include students who did not complete?
        iii. How do you determine completion/success?

    j. What test (performance) instruments do you use?
        i. How well does it work?
        ii. Pluses – minuses
        iii. How well does it inform instruction
        iv. Who administers? Are they trained to administer?
        v. Frequency of follow-up tests

    k. What follow up do you conduct after student success/exit?
        i. Do you follow up with students who do not complete?

    l. What are essential features of your services?
        i. Are there companion services that facilitate success?

    m. Name & discuss your competitors.
        i. University
        ii. Community colleges
        iii. Job training programs

    n. Discuss the students you lose before success/exit.

    o. Do you see any patterns leading to success?

    p. Is there anything else you'd like to say about your program that we haven't talked about yet?

    q. What will be the best mode to conduct a survey with your students? US mail, Online Survey, in person survey

Participant Survey

Student Survey

The New Mexico Coalition for Literacy (NMCL) is participating in a program evaluation designed to help it improve services. Please take a few minutes to fill out this voluntary survey. Names are not required, and Apex Evaluation will keep your information private. Your honest responses will help us understand details about how the program works. If you have questions, please call Dr. Curtis Mearns (505-550-1527), Apex Evaluation, or Heather Heunermund (505-982-3997) NMCL.

1. What is your age? _____ 2. Current job _____

3. Marriage Status ☐ Married ☐ Never Married ☐ Divorced ☐ Widowed

4. Number of Children? _____

5. Ethnicity (Check all that apply) ☐ Anglo ☐ Asian ☐ Black/AfAM ☐ Hispanic

   ☐ Native Am/AK Native ☐ Native Hawaiian/Other Pacific Islander

6. What is your Gender? ☐ Male ☐ Female ☐ Transgender

7. What made you look for the services you receive at this literacy center?

8. How did you find this literacy center?

9. Was this the first place you sought help? ☐ Yes ☐ No
   (If yes Skip to Question 10)

   a. If no, what other places did you attempt to receive services from?

   b. What was effective or ineffective about each place you sought services before coming to the literacy program?

10. Have you reached your learning goals yet? ☐ Yes ☐ No
    a. If no, how much longer do you think you will attend?

    b. Could something have been changed to support reaching your goals?

11. Did your life change as a result of these services? If so, how?

12. How did any other family members lives change as a result of the services you received?

13. Describe how important of maintaining your privacy was while receiving these services.

14. What other services did the organization offer that you needed to ensure your success?

15. What benefits came from those services in addition to being able to complete the literacy program?

16. Describe what made this program a success for you?

17. We would like to interview 2 or 3 participants of the literacy center. If you are willing to be interviewed, please provide your contact information below.

Name _____

Phone Number _____

Email Address._____

Tutor Survey

Tutor Survey

The New Mexico Coalition for Literacy (NMCL) is participating in a program evaluation designed to help it improve services. Please take a few minutes to fill out this voluntary survey. Names are not required, and Apex Evaluation will keep your information private. Your honest responses will help us understand details about how the program works. If you have questions, please call Dr. Curtis Mearns (505-550-1527), Apex Evaluation, or Heather Heunermund (505-982-3997), NMCL.

Tutor Experience

1. What is your age? _____ 2. Current job _____

3. Marriage Status ☐ Married ☐ Never Married ☐ Divorced ☐ Widowed

4. Ethnicity (Check all that apply) ☐ Anglo ☐ Asian ☐ Black/AfAM ☐ Hispanic

   ☐ Native Am/AK Native ☐ Native Hawaiian/Other Pacific Islander

5. What is your Gender? ☐ Male ☐ Female ☐ Transgender

6. How long have you been volunteering at this literacy center?

7. What other volunteering have you done in the last 2 years?

8. Do you think you will continue volunteering here for the next 6-12 months or longer? ☐ Yes ☐ No

9. What is different about being a literacy tutor versus some other volunteer experience you performed?

10. How did you find this literacy center?

11. Describe personal qualities of the students that contributed to students success.

12. Describe personal qualities of the students that made them cut their studies short.

13. Describe **program** qualities that made students successful.

14. Describe **program** qualities that made students cut their studies short.

15. How does your life improve as a result of volunteering?

Tutor Description of Student Experience

16. What brought your students to the literacy center?

17. Discuss issues with use of goal attainment or reading proficiency (test scores) as a measure of success (your preference and why).

18. How did students' lives improve as a result of these services?

19. How did any other family members lives improve as a result of the services your students received?

20. Discuss if and how stigma played into your students' participation.

21. Discuss what other challenges your students needed to address to attend this program.

22. Did the program assist students in addressing those challenges? If so, how?

23. What benefits did students receive from those services in addition to being able to complete the literacy program?

24. What would make the program stronger?

25. What would help attract and retain adult literacy tutors?

26. We would like to interview 2 or 3 tutors. If you are willing to be interviewed, please provide your contact information below.

Name _____   Phone Number _____

Email Address._____

Participant Interview

<u>Students:</u>
Get Background
        Age
        Eth
        Family status
        Employment

How did you find your way to the program?

How did you find your way to a tutor once inside the program?

How did you set goals and evaluate progress for your learning?

Discuss full range of efforts to meet your goals.

Discuss role of privacy.

Eliciting success stories,

Details of outcomes

Tutor Interview

Tutor:

Get Background
      Age
      Eth
      Family status
      Employment (previous?)
      How many students have you tutored?
      Characterize success? E.g. ¾)

How did you find your way to the program?

Have you had any previous experience they may have had with other kinds of volunteering?

How did you find your way to the student once inside the program?

How did you set goals and evaluate progress for your tutoring?

Discuss participant efforts to improve their own literacy.

Ask about the stimulus to improve reading (the desired latent outcome)

Discuss role of stigma,