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Literature **Review**

How Do Intermediary Organizations Support
Stronger Pathways Systems For Young People?

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INTRODUCTION

As students in the United States prepare for a future where they can thrive, they often face systemic barriers at every stage of their postsecondary journey, from enrollment through completion and gaining access to careers that have the potential for upward mobility. This is particularly true for students who have not traditionally had the same access to postsecondary and employment opportunities. Black, Latino/a/x, Indigenous, and people of color (BIPOC), learners who have experienced poverty and students in rural communities have all historically been excluded from pathways to economic mobility.

The ongoing COVID-19 pandemic threw our fragmented systems into sharp relief, but the connection points—or “pathways system”—between education and employment systems had already resulted in inequitable access to careers with upward mobility for students historically marginalized.¹ Too often, pathways partners—K12, postsecondary and employers—are siloed from one another despite having aligned interests and needs. Working in silos means that partners are often unable to develop a shared vision for what equitable pathways to employment look like or to commit to collaborating across sectors to achieve it. In some cases, accountability structures can serve to disincentivize system actors from working together, creating fragmented systems students must navigate as they seek to enter postsecondary education and the workforce. Such siloes can prevent actors with shared needs and interests from having important conversations, such as what system-level infrastructure is needed to create pathways to economic mobility or how to provide a continuum of guidance and supports for students to navigate those pathways. In addition, dated narratives about how students can achieve upward mobility as well as a history of “tracking” can sometimes stymie cross-sector collaboration before it even begins. Beyond the systemic and narrative barriers, students often face programmatic barriers—such as programs that are scattered and insufficiently resourced or inequitable access to career-connected learning opportunities—as they strive for a career where they can thrive.

To change outcomes for students at scale, the pathways systems need to transform for greater cohesion and equity. Systems-change literature elevates the role that “quarterback,” “backbone” or “intermediary” organizations can play in marshalling partners to transform systems.² Pathways intermediaries—organizations that create a bridge between K12, postsecondary and workforce partners—are emerging as crucial actors in constructing a more equitable pathways system.

This literature review is part of a larger study being conducted by Education First with support from Ascendium Education Group and the Bill & Melinda Gates Foundation to better understand the current landscape of intermediary organizations that seek to create stronger transitions between high school, postsecondary and workforce systems. This literature review aims to better understand what is known of these organizations, what makes them successful and how they can scale to serve more BIPOC students, students experiencing poverty and/or rural learners in every state. By synthesizing existing research, this literature review offers funders, policymakers and practitioners a holistic and concise introduction to pathways intermediaries. Details on our methodology and limitations of this review can be found in the appendix.





KEY TERMS

List of working definitions for key terms in this review

- **Pathways:** integrated, intentionally designed structures and supports that span high school and postsecondary systems and enable the delivery of credit-bearing courses, learning experiences and student supports that lead to postsecondary credentials and successful transitions to the workforce.³
- **Pathways intermediaries:** organizations that sit at the center of an education and employment ecosystem, brokering partnerships and coordinating activities between K12 schools, postsecondary institutions and employers to increase equitable access to opportunities and paths to upward mobility for Black, Latino/a/x and young people experiencing poverty.⁴
- **Partnership:** a place-based, multi-stakeholder initiative or effort that strives to improve outcomes in a community.
- **Community:** the site and the site's population that a collective initiative or effort seeks to serve.
- **Systems change:** a shift in the conditions that produce and maintain societal problems such as practices, structures, policies, power dynamics, resource flows and mindsets; it often brings together stakeholders from multiple sectors including nonprofit, public, private or philanthropic institutions along with community constituents.⁵
- **Core capacities:** the capabilities, knowledge, skills and resources that constitute an organization's strength.
- **Enabling conditions:** the situation or environment that increases the likelihood of successful outcomes.

What is a pathways intermediary?

The terms “pathways” and “intermediaries” have varying connotations and applications in different spaces in the education sector. For the purposes of this review, a “pathways intermediary” is defined as an organization—or partnership of organizations—that connects state/regional/local employers, K12 education leaders, local government, postsecondary institutions, policymakers and nonprofit organizations to develop and grow the “education to career” pipeline.⁶ Pathways intermediaries unite the needs of employers (both public and private sector), education and community partners and learners and/or job seekers and can be designed to serve a wide variety of stakeholders including high schoolers, industry-specific workers and specific geographies. This literature review focuses on intermediary organizations that operate in the high school, postsecondary and workforce transitions—or “pathways”—space.

Intermediaries serve as go-betweens and common points of contact for all the parties involved in work and learning. Intermediaries are often neutral third-party organizations, and some are embedded within community colleges, chambers of commerce, local philanthropy or other larger organizations.⁷ Many models of intermediaries exist. Some intermediaries serve primarily in a convener role, providing little, if any, direct services because they facilitate connections to other partners that serve this function.⁸ Other intermediaries build and deliver pathways programming directly to young people.⁹ In some cases, intermediaries might blend the two approaches to best meet the needs of their partners and the students they support. Although much of the literature focuses on place-based organizations, intermediaries can operate at different levels—while some intermediary organizations function locally, others operate at regional, statewide and multistate scales. These organizations can span the work-based learning spectrum, and the level of ownership over program outcomes varies from intermediary to intermediary.¹⁰

A review of available literature suggests that regardless of model, intermediaries play a crucial role in transforming systems by bringing stakeholders together to design and ensure the successful implementation of career pathways that span from high school to postsecondary learning to a first career.¹¹ In “The Water of Systems Change”, FSG, a nonprofit social advisory organization, elevated six conditions of systems change: what they call “explicit” conditions like policies, practices and resource flows and “implicit” conditions like relationships and connections, power dynamics and mental models.¹² The authors suggest that the implicit systems-change

conditions are often overlooked but can have a lasting impact on the ability to successfully change systems.¹³ Throughout the following sections of this literature review, many of these conditions of systems change will emerge through the lens of what a pathways intermediary is best positioned to do and the conditions that support its work.



Pathways intermediaries unite the needs of employers (both public and private sector), education and community partners and learners and/or job seekers and can be designed to serve a wide variety of stakeholders including high schoolers, industry-specific workers and specific geographies.



What are the core capacities of pathways intermediaries?

Given the wide range of contexts and types of work that pathways intermediaries may engage in, this review did not unearth a single set of specific success metrics or capacities that are clearly agreed upon by the field for all pathways intermediaries. However, available literature suggests that success for a pathways intermediary is rooted in the needs defined by the community the organization operates within and is connected to the unique capacities that intermediaries contribute to partnerships. In fact, research on coherent, high-functioning, equity-centered, place-based systems that span all education sectors from cradle to career suggests that adapting the functions of the intermediary to the particular needs and capacities of its partners can create stronger community ownership of the systems-change agenda. Partnerships can do this by devolving some functions that the intermediary—a single organization—historically carried out to its key partners based on their strengths and capacities.¹⁴

its K12 and postsecondary partners to deliver programming for students and on a local philanthropic partner to apply its knowledge of the community to the pathways effort. However, for the sake of simplicity, this literature review generally refers to “an intermediary” in describing its core capacities and the conditions that enable its success. An analysis of previous literature unearthed six core capacities that tend to be present among organizations in the pathways intermediaries ecosystem, explained in detail below.

Building partnerships across sector partners: Pathways intermediaries serve as external partners to help catalyze and sustain relationships across K12 institutions, postsecondary institutions and employers.

The literature indicates that creating and developing effective, equity-oriented partnerships is one of the most important activities of a pathways intermediary.¹⁶

Six core capacities to create pathways ecosystems

- **Building partnerships across sector partners.**
- **Collecting and using data.**
- **Designing, supporting or providing pathways programming.**
- **Holding community knowledge and maintaining credibility.**
- **Advocating for funding and policy that promotes equitable pathways.**
- **Managing cross-sector strategies across partners to close equity gaps.**



This list of six capacities is not intended to be used as a model or rubric for evaluating intermediaries; many tools and models to do just this already exist in the literature.¹⁵ Rather, deeply understanding these six core capacities can open opportunities for partners—employers, policymakers, educators, philanthropy and so on—to support intermediaries more effectively in transforming local systems for greater equity. It’s also important to note that these six capacities might be performed by two or more organizations in the ecosystem. For example, a stand-alone intermediary organization might manage relationships across the pathways ecosystem while relying on

A pathways-intermediary organization operates in a unique role as a third party that can help create and maintain relationships across relevant entities. Intermediaries link otherwise disconnected groups, building trust among partners and providing needed capacity and expertise to create or support pathways.¹⁷ Partnerships are typically formed between K12 institutions, postsecondary institutions and employers; however, partnerships can be formed with any organization within a community that aims to improve the pathways available to students.

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Case Study 1:

Striving for equitable systems change by strengthening pathways for students

The Foundation for Tacoma Students and the Graduate Tacoma movement Tacoma, Washington

Pathways intermediaries often find themselves in the business of systems change. Intermediaries can approach systems change through a variety of ways, including direct programmatic support for students or a focus on systems-level inputs through relationship management, capacity building and convening. **The Foundation for Tacoma Students (FFTS)**, a member of the StriveTogether network, is the backbone for Tacoma's Graduate Tacoma movement. FFTS's work focuses on aligning system partners around a common vision for students while acknowledging the ways in which racial and educational inequity within the region have led to inequitable outcomes for students.

The Graduate Tacoma movement is a coalition of educators, community-based organizations, employers, nonprofits and more who strive for an equitable future for their students. The movement's goal is that by 2030, 70 percent of Tacoma Public Schools students will earn a degree or technical certificate or gain a good-earning wage-employment opportunity within six years of graduation.

While FFTS does not develop or manage direct services for students, their strength lies in coordinating and building the capacity of their programmatic partners. FFTS acts as a technical assistance support for community-based organizations who run programming to support students. FFTS assists them in managing different data systems concerning regional pathways and coaches them on how to analyze and make connections across systems. When partners might be hesitant to share their programmatic or student-outcome data, the organization leverages its credibility as an honest broker and strength as a convener to help establish new relationships between partners.

By keeping its focus on the whole system and coordinating partners to implement pathways programming, FFTS ensures that each partner plays a clear role in coordinated community-wide action to support every young person on their journey to equitable economic mobility.

Building partnerships across sector partners: (continued)

By bringing together a wide range of stakeholders (including education and training providers, employees, students and community organizations), intermediaries connect the key actors and align them on a clear and mutually shared vision. With high-quality local partnerships that help provide in-depth knowledge of local labor markets, an intermediary supports the creation of pathways that allow students to explore their postsecondary and workforce options during their K12 and postsecondary experience.¹⁸

The partnerships formed by pathways intermediaries are integral and can be managed and maintained by effective engagement and high-quality leadership to sustain organizational success. Additionally, strong partnerships ground intermediaries' work in the needs of their communities by aligning work with organizations that are proximate to the people they intend to serve. Research highlights that the center of effective intermediary organizations is a strong leader with multifaceted skills that enable them to build, manage and sustain relationships with partners.¹⁹ However, pathways intermediaries must go beyond relying on strong leadership and ensure that there is collective empowerment.²⁰ Systems-change literature highlights that when leadership and power are distributed across an organization, single leaders' roles diminish and buy-in from multiple stakeholders is expanded, decision-making bottlenecks are reduced, and the likelihood increases that the change wrought by the project will have long-term staying power.²¹ Strong partnerships and high-quality leadership are especially important when national organizations look to form connections to local communities.

Collecting and using data: Intermediaries use data with their K12, postsecondary and employer partners to assess programming, inform goals and set a vision that aligns with local labor market demand and strives for equitable student outcomes.

Current research shows that pathways intermediaries strive to collect and use data in a manner that drives continuous improvement for the pathways intermediary itself, its partners and the students engaged in the pathways services. Effective pathways intermediaries use data externally to better align pathways programming and internally to assess the outcomes of their learners.

High-quality data practices involve using a wide variety of local, state and federal data sources to understand trends, gaps and opportunities within local labor market pathways. The ease with which intermediaries can do this varies state by state, as each state has different practices and state-level policy outlining how it links, governs, and makes accessible cross-sector data.²² As a work-around intermediaries often include data-sharing agreements between K12 institutions, postsecondary institutions and employer partners as key components of the partnerships they broker.²³ The literature suggests that particularly high-functioning intermediaries emphasize collecting high-quality data that disaggregates by race, gender, special populations and socioeconomic status to identify gaps, needs and experiences of marginalized student groups such as Black and Latino/a/x students.²⁴



Additionally, pathways intermediaries often collect and analyze programmatic and learner-participation data to inform and assess pathways programming. Through their own (or their partners') data collection, pathways intermediaries can share the stories and experiences of the people they intend to serve. Given that certain populations are hidden in secondary data let alone institutional/public data sets, the collection and use of quantitative and qualitative data are key distinguishing factors when it comes to addressing equity in systems change. Collected data inform shared goals, visions and success measures among sector partners.²⁵ Examples of high-quality data use include tracking individual performance in pathways programming, monitoring equitable outcomes, analyzing employment retention rates and aligning curriculum with job projections.^{26 27}



Case Study 2:

Creating data fluency, strong infrastructure and real-time understanding for pathways partners

Economic Mobility Systems at the Commit Partnership Dallas, Texas

Economic Mobility Systems is an initiative of the Commit Partnership, a collective impact organization of more than 200 partners in Dallas County and a member of the StriveTogether network. Commit started Economic Mobility Systems as part of its effort to increase access to college and work opportunities by helping equitable pathways partners manage shared equity goals and giving them the ability to see and support the student journey in real time.

Economic Mobility Systems' approach emphasizes the importance of technologies to support data collection and use in pathways systems. Eric Ban, Executive Director of Economic Mobility Systems, says, "Our school district, college, community and workforce partners are requesting support in securing and activating real-time data to help support students on their journey across K12 to a good job. While there are many examples of good data and case management work inside the silos of K12, postsecondary and workforce, there are very few examples of doing this type of real-time case management across the silos. This is the work we do and the work that is necessary if regions are truly committed to equity in socioeconomic mobility."

Recognizing that data platforms are only the first step to effectively using data to promote more equitable pathways design, Economic Mobility Systems designs their services to be three-year engagements. They coach pathways partners within a region to become comfortable with using and administering the technology. Another primary focus is increasing the data fluency—knowing how to use the data to drive decisions and collaboration—in addition to the technical components of their work.

The team has successfully supported rural and urban communities across Texas and is now working in states throughout the country to scale access to data-driven decision-making and collaboration. For example, as a strategic partner to Garland Independent School District (one of the seventy-five largest in the country), Economic Mobility Systems helped the district pioneer Salesforce CRM and data to geo-map the location of dense populations of students who have not been successful in completing their financial aid applications. Partners use data to identify community-based intervention points, such as local churches, businesses, libraries and fire stations, where the district can more effectively leverage its resources to help these students and achieve exceptional financial aid completion results.



What are the core capacities of pathways intermediaries?

Designing, supporting or providing pathways programming: Intermediaries work with their partners, community and staff members to develop, support and empower equitable and effective pathways programming.

The literature emphasizes the role that effective pathways intermediaries play in actively listening to partners, employees and students to incorporate feedback into the development and implementation of pathways. Depending on how they are situated, intermediaries can do this directly through student surveys and partner focus groups or indirectly by building partners' capacities to engage in cycles of continuous improvement. Through this process, pathways intermediaries can serve to build capacities for their partners by creating the systems that allow for the voice of those most proximate to be embedded into pathways work so that the collective infrastructure around a given pathway becomes stronger and more resilient.²⁸ Pathways intermediaries can also ensure that strong pathways exist for the growing sectors that have jobs paying family-supporting wages and offering opportunities for advancement.²⁹ In order to create continuity in programming, pathways intermediaries align recruitment efforts with postsecondary and workforce partners and advocate for changes to credentialing and institutional policies to create smoother transitions and best support students throughout the pathways.³⁰ In some cases, pathways intermediaries may also deliver the programming themselves. The literature indicates that these programs need to be designed with a culturally responsive and equity-focused vision at the core to affect outcomes for the most marginalized within a community.³¹ An example of equity-focused design principles that ensure pathways programming best supports youth comes from research conducted by Jobs for the Future (JFF). The four principles their work lifts up are:

- Apply best practices tailored to support the most marginalized communities.
- Ensure that programs center on the young people's assets.
- Build cultural competence among youth and the adults who work with them.
- Support youth in exercising self-advocacy.³²

By incorporating design principles such as these into data-informed pathways-programming design, intermediaries can ensure that their programming is designed to close racial and socioeconomic opportunity gaps.

Holding community knowledge and maintaining credibility: Pathways intermediaries deeply understand the communities they work in and ensure that their mission, vision and programming all directly support and empower their community.

Research demonstrates that pathways intermediaries often have access to, credibility with and knowledge about key individuals in a community. Credibility with the business community is paramount, but trusting relationships with educators, community leaders, students, employees and policymakers are crucial as well.³³ By grounding themselves in the community, effective intermediaries can view local demand for different jobs in their region and tailor their efforts to meet the unique individual, institutional and economic needs of a specific time and place. To have programmatic success, pathways intermediaries leverage their knowledge of the community, which developed from being members of that community and establishing physical presence and experience with community or through partnerships with long-standing, trusted organizations.^{34 35} Engaging community members ensures that adults working with young people buy into the process, have a voice in pathways design and make a commitment to seeing young people successfully navigate through a pathway.³⁶ Organizations need to have not only a knowledge of the community but also credibility with the organizations (employers and nonprofits) and institutions (K12 schools and postsecondary institutions) within it too. Young people also need to trust the intermediary. Engaging youth voice is a critical part of ensuring pathways programs are meeting their needs. This is especially important for national intermediaries who often must build trust within a community. A strong reputation in a community allows pathways intermediaries to better develop relationships with employers, educators, community leaders, policymakers and funders.³⁷



Advocating for funding and policy that promote equitable pathways: Pathways intermediaries leverage their credibility and relationships to mobilize resources, policies and public will to support equitable pathways.

The literature shows that pathways intermediaries can leverage their reputation, influence and authority to support and promote equitable policies at the federal, state, regional, local and institutional levels. These efforts are particularly effective when they elevate the voices and experiences of learners of color and those experiencing poverty to help influence policymakers.³⁸ Pathways intermediaries can lean on their knowledge and convening power to influence the field, bring together policymakers and resources and advocate for the creation of effective pathways.³⁹ Research also suggests that effective communication is essential for successful advocacy.⁴⁰ Organizational sustainability depends upon regular communications with project partners, policymakers, funders and other stakeholders about lessons learned, impact and added value.⁴¹ Related to intermediaries' role in developing partnerships, strong communication skills also enable intermediaries to build public will for pathways and broker relationships across the community.⁴² Poor communication can lead to misunderstandings between partners or inadequate buy-in to project goals and strategies and, in turn, to a lack of funding.⁴³

Furthermore, successful intermediaries continually advocate for their funding, both for increasing their impact on students as well as sustaining themselves as organizations. Intermediaries advocate by mobilizing their resources through partnerships to secure and blend private and public funding, thereby avoiding reliance on any specific funding source and ensuring their organizational viability.⁴⁴ Through the advocacy process, intermediaries create a sustainable model by effectively and efficiently using material resources and human capital and sharing costs and resource needs among partners when necessary.⁴⁵ Intermediaries rely on strong relationships and data-backed evidence to advocate for funding to further increase equitable outcomes for learners, especially learners of color and learners experiencing poverty. Lastly, leaders of pathways intermediaries use data and personal experience to clearly articulate an organizational mission and goals to convince funders that they are funding a reimagining of social structures.⁴⁶ A successful intermediary leader weaves together multiple funding streams, develops strategies and tools that enable them to maximize the resources available and thinks strategically about how to leverage resources for greater added value.⁴⁷

Ability to manage cross-sector strategies across partners for closing equity gaps: Working with their partners, pathways intermediaries create, support and enable practices that close equity gaps within their communities.

Available literature suggests that pathways intermediaries can serve as vehicles to increase the economic opportunity of learners. Over the past two years, COVID-19 has disproportionately affected the economic mobility of young people, especially those of color, when compared to millennials and older generations.⁴⁸ Greater economic mobility in part requires that the K12 education system, higher education and employers work together to close these equity gaps. As a connector within a pathways ecosystem, pathways intermediaries foster the cocreation of equitable principles and practices across core partners.⁴⁹ Many organizations within the pathways ecosystem may be willing and capable of creating and setting goals that focus on addressing equitable outcomes for students. However, pathways intermediaries are often critical for setting ambitious equity goals and leading their partners, education institutions, community organizations and employer partners in implementing programs, policies or processes that advance equity through pathways programs and work-based learning.⁵⁰

High-functioning pathways intermediaries intentionally commit to focusing on racial justice and equity in every aspect of their own work.

In addition to leading on equity with cross-sector partners, high-functioning pathways intermediaries bring their shared vision to life by intentionally committing to focusing on racial justice and equity in every aspect of their own work.⁵¹ Examples of this include adopting an antiracist and equity-centered approach and advocating for increased support in policies that directly enhance the ability of students to engage in pathways (wage replacement, mentorship, training).⁵² Studies emphasize that intermediaries play roles in explicitly helping learners build their capacity to identify and address the challenges they may face in the workplace. Pathways intermediaries develop the capacity of learners to recognize and self-advocate in response to inequity while also developing capacity among practitioners to simultaneously listen, learn and lead regarding racial equity.⁵³ Additionally, pathways intermediaries balance the tension brought between the needs of employers (to hire quickly) and the long-term equity goals of a community (to build effective and responsive pathways and support systems).

Pathways intermediaries' ability to connect learners to human service providers that can address nonacademic needs is another crucial factor for success. Students who experience poverty may endure more challenges related to meeting basic needs, and those must be met before they can fully engage in education and career pathways. These challenges can be compounded for students of color or students from rural communities, who often face additional barriers to accessing

support and opportunities.⁵⁴ Furthermore, intermediaries serve an important role by addressing learners' nonacademic needs such as housing, transportation, healthcare, childcare or immigration support.⁵⁵ The work of intermediaries can only be successful if participants can take advantage of the services being offered and use them to add value to their own workforce trajectory to advance toward economic stability.⁵⁶

Case Study 3:

Supporting partners with strategies to advance race equity

Achieving the Dream Headquartered in Portland, Oregon

Intermediaries are well positioned to ensure that pathways strategies prioritize race and socioeconomic equity. One way they achieve this is by coaching their partners to develop and implement strategies that address the root causes of inequities. **Achieving the Dream** accomplishes this through a range of consultative services to help community colleges become engines of student and community growth. Achieving the Dream leads a network of more than 300 institutions of higher education, 75 coaches and advisors and multiple partners across 45 states.

As an intermediary with national reach, Achieving the Dream has refined a model of support that can scale to new institutions in their network quickly. This model is an intensive, three-year engagement that builds the capacity of institutions to support students and includes fostering meaningful partnerships with K12 leaders and employers. To support an institution's learning and growth, Achieving the Dream pairs the institution with trained coaches and provides detailed feedback on implementation plans, support with tracking metrics for success and access to a supportive learning network.

Achieving the Dream's work is grounded in a vision of catalyzing "antiracist, equitable and economically vibrant communities" through their work in building community-college capacity. To make this vision come to life, the organization has invested deeply in tools, methods and human capital to drive equity through each engagement with partner institutions. For Khalisa Jacobs, the chief of staff at Achieving the Dream, requiring disaggregated data as a first step in supporting schools is crucial to the success of the model. "We have an evidence-based, 'look-at-your-data' approach from the beginning. When we go into any school—even before we get deeply entrenched in what you might call the 'equity work'—we first look at disaggregated data for their student population together."

Achieving the Dream goes further by ensuring that each coach has training and tools to handle situations where institutional leaders might not feel ready to have difficult conversations about equity gaps and how to close them. Coaches are equipped with an expansive view of how inequities can manifest—classroom dynamics, curriculum, professional development for faculty—and a set of resources they can use to guide institutional leaders to more equitable approaches. Achieving the Dream staff are also realistic that this process will look different for each school and each school leader. Jacobs reflects: "To tell you that every school is ready to talk about race would be a lie. We try to meet colleges where they are and start where they're ready to start—but we're never not going to challenge them to think one layer deeper."

What are the enabling conditions for a pathways intermediary to be successful?

In addition to the core capacities noted above, the literature also identifies several contextual factors, or enabling conditions, that can impact the ability of pathways intermediaries to be successful in promoting equitable outcomes for students.⁵⁷ Creating stronger transitions for students as they journey from high school through a postsecondary education and into the workforce requires transforming the way that partners in the system collaborate. Pathways intermediaries help motivate and sustain systems-change processes to create smoother pathways with more equitable outcomes. Literature on systems change provides a useful research basis for understanding the enabling conditions at play when intermediaries strive to create more equitable systems. This literature review builds off the conceptual framework developed in “What Drives Systems Change? Key Findings and Implications from a Literature Review on Systems Change in Education” by Mathematica Policy Research and Equal Measure.⁵⁸

The authors reviewed 96 studies on systems change to develop a framework for understanding the components of successful systems-change partnerships and the existing conditions that affect their success. This framework lays out three contextual factors that influence the success of systems-change efforts, explained in more detail below.

Enabling conditions for pathways intermediaries

- **Existing attitudes and norms around cross-sector collaboration.**
- **Policy context.**
- **Partner engagement.**

Existing attitudes and norms around cross-sector collaboration: Stakeholders’ beliefs, experiences and history with collaborating across sectors can influence how quickly pathways intermediaries broker the relationships needed to be successful.

The existing relationships among partners and community members can affect the ability of an intermediary organization to succeed.

Literature underscores the need for an intermediary to be a trusted organization, one that is the honest broker in the room and seen as neutral by the stakeholders it convenes.⁵⁹ Existing research also indicates that intermediaries must establish a clear understanding of power dynamics within the community from the onset of their work. If power isn’t acknowledged and/or effectively distributed once collaboration begins, some partners may lose agency within the initiative, which can result in disparity in student outcomes.⁶⁰ It is important to recognize which stakeholders have greater capacity, status or resources to ensure that one stakeholder does not have disproportionate influence on a partnership. Understanding and addressing power dynamics are key parts of an intermediary’s pursuit of equity, in particular ensuring that groups who have been historically marginalized from power are involved in decision-making. Furthermore, if cross-sector partners have successfully worked together before in some capacity, pathways intermediaries will likely get further faster than if they must broker brand-new partnerships for the first time.⁶¹

Stakeholder attitudes can critically influence an initiative’s success. When working within a system to enact change, history shapes stakeholder attitudes and facilitates the ability for collaboration or discourages cooperation and long-term success.⁶² Additionally, an explicit commitment by all stakeholders to racial and socioeconomic equity increases the likelihood that stakeholders do not place equity on the back burner as the intermediary grows.⁶³

Clearly established collaboration norms are integral for partnerships to be sustained. The literature suggests that after acknowledging hidden, taken-for-granted norms, leaders and partners must work collectively to redefine their roles in the collaboration while determining which aspects of their original routines, traditions, cultural and institutional norms should remain.⁶⁴ This practice will make it easier to respond and conform to external pressures imposed by the broader, institutional environment.⁶⁵ Clearly established norms and expectations will create a sense of shared ownership and accountability.⁶⁶

Policy context: Supportive institutional, local, state and national policies can create clear goals and financial incentives for pathways development that enhance intermediaries' success.

The political context that a pathways intermediary is working within also greatly affects their ability to create systemic change and elevate equity within their work.

Pathways intermediaries engage with many different policies at the federal, state and local level. At times, policy can be enabling (e.g., federal policy in support of career and technical education, Perkins V) or restricting (e.g., labor laws and institutional policies).⁶⁷ Over the last 50 years, shifts in policy that encouraged market-based solutions/provided incentives for private-sector actors to invest and engage in public education systems have given rise to increased private-sector participation in education and allowed for more multisector partnerships.⁶⁸ Policymakers can significantly impact the ability of pathways intermediaries to create and sustain systems change. Policymakers can define clear goals for pathways through mandates such as statewide postsecondary credential-attainment goals that can provide momentum for pathways efforts externally and internally.⁶⁹ For example, research from JFF has shown that expanding dual-enrollment opportunities to a wide range of students can increase student motivation to complete high school and ultimately saves both families and states money.⁷⁰

The availability and accessibility of public funding and resources also contribute to success of pathways organizations. Existing research on intermediaries has shown that the lack of funding and resources is the most common challenge to systems-change organizations. Many initiatives and organizations rely on public funding; however, this funding can be unstable, and organizations often must look to private or additional public funding sources for stability. The literature elevates a variety of different ways intermediaries are constituted and funded. For example, in Massachusetts, a line item in the state budget offers funding to pathways organizations, whereas in Illinois, public-private pathways intermediaries tapped into Race to the Top funding to support their work.⁷¹ In some cases, intermediaries have found success with support from venture capital and fee-for-service business models that can be self-sustaining over time.⁷² Lastly, philanthropic funding also provides significant support to pathways intermediaries. However, research has also highlighted the long-term challenges in sustaining this funding.⁷³ Further discussion on the impact of sustainable funding can be found in the implications for stakeholders section.

Partner engagement: Mobilizing support and partnership from lawmakers, the business sector and a strong funder base creates an environment where intermediaries can thrive.

The engagement of a broad spectrum of partners within a community can enable pathways intermediaries. It is critical to have the right people at the table and in the community to organize learning and work-streams strategically toward specific goals.⁷⁴

Research shows that local lawmakers are particularly important in impacting the ability of organizations to create systems change. Having the support of local lawmakers in P16 councils, for example, can be important in influencing policy and securing funding.⁷⁵ Relationships with lawmakers can ensure that education programs are aligned with the state's economic development strategic plans and labor market needs.⁷⁶

Having an active and engaged business sector can also greatly influence the success of a pathways intermediary. Business partners can keep an intermediary relevant within the chosen industry by being aware of technology changes, emerging skill gaps or management issues and changes in the structure of the workforce. Additionally, involvement from local business leaders can ensure that a pathway remains a resource for its partners within the industry and a source of information on conditions and trends.⁷⁷ Employers can become critical allies in the development of effective pipelines by aligning their own resources to support pathways that meet their talent needs. These alignments include adapting tuition reimbursement programs to regional pathways efforts or supporting changes in employee work schedules to support employees' ongoing education. Studies examining the return on investment for employers who offer tuition assistance to its employees have indicated potential for a strong return on investment. For example, between 2012 and 2014, Cigna found a 129 percent return on investment of its Educational Reimbursement program through avoided talent-management costs, and employees who participated achieved 43 percent higher incremental wage gains.⁷⁸

Additionally, having a community with an engaged funder base will impact the ability of pathways intermediaries to raise and sustain funding. Research has shown that intermediaries are more likely to be successful when they have access to multiple funding sources and use them efficiently.⁷⁹ If only a small, concentrated number of funders are involved, those funders can then have disproportionate power over the fate of the collaborative work.⁸⁰ Identifying varied sources of funding is particularly important for intermediaries that are based in rural communities, where the philanthropic base of support tends to represent a small proportion of foundation assets nationwide.⁸¹ Despite containing approximately 20 percent of the national population, rural communities only receive about 7 percent of foundation giving.⁸²



Case Study 4:

Starting with local context to seed pathways strategies that will last

Colorado Education Initiative and Colorado Succeeds Colorado

Regardless of whether intermediaries operate nationally, across an entire state or within a single town, adapting pathways strategies to community context is crucial for buy-in and long-term sustainability. One intermediary effort, the **Homegrown Talent Initiative**, is anchored on the simple idea that starting with the needs, culture, history and priorities of local partners will result in greater long-term success of the pathways strategies.

The Homegrown Talent Initiative is a project of the Colorado Education Initiative (CEI) and Colorado Succeeds. It launched in 2019 to provide intermediary capacity for cross-sector pathways partnerships between rural districts, employers, policymakers and communities.

From the beginning of the effort, leaders of the initiative placed a premium on user-centered design. Their approach enables local community leadership and design teams of K12, business and higher-education leaders to develop solutions to the most pressing challenges in their community. For example, one school district facilitated several community listening sessions and invited a local parent and business leader to sit on the steering committee for its pathways-design work. The initiative has developed frameworks to identify stages of a pathway for students and compiled exemplars for communities to reference in designing their own approaches. Each participating community begins with a design phase to understand disaggregated student outcome data in their community. Landon Mascareñaz, vice president of community partnerships at CEI, shared that this is where they lay the foundation for equitable design. “We want rural communities to begin with what equity looks like in their community by anchoring them on their hyperlocal context. In one community, their significant [50 percent] Latino community is where they begin. In another place, their big equity issue is one of mobility. By exploring that a large proportion of white kids on free and reduced lunch and students with mobility causes challenges for learning and progress, we can generate community-driven recommendations based on the data.”

After assessing their local context, communities begin designing solutions that will work for them given their culture, history, high-priority needs and unique local assets. The impact of local context can clearly be seen in the **diversity of approaches** that each design team generates—while all approaches are informed by best practice, they each marshal their unique local assets in pursuit of a shared community goal.

What do pathways intermediaries need to have in place to sustain their work and/or scale successfully?

A wide variety of factors contribute to the long-term success and sustainability of pathways-intermediary organizations, including the following:

- Using varied funding sources.
- Investing in human capital.
- Maintaining deep roots in the needs of the community.

Using varied funding sources: Varied streams of funding are important for effective intermediaries to scale their expertise and maintain operational consistency.

To have a lasting impact, intermediaries must take advantage of opportunities for public and private grants and contracts but not rely on them for long-term sustainability. Intermediaries must weave multiple funding streams, develop strategies that enable them to maximize available resources and think strategically about how to leverage resources for greater added value.⁸³ However, it is also important to remember that funding strategies and sources will be unique to each intermediary given their specific context, focus and organizational structure. A “one size fits all” approach to financing intermediaries is impractical.⁸⁴

Investing in human capital: To be sustainable in the long run, effective intermediaries invest in human capital, including trusted and credible leadership.

Strong leaders must be able to balance the day-to-day intricacies of leading a pathways intermediary with communicating a clear value proposition to funders and policymakers. However, finding leaders who can maintain this balance and do it effectively is challenging. Literature shows how balancing the needs of many stakeholders and having to continually manage project direction, vision and funding commonly leads to burnout.⁸⁵ Usually, leaders of pathways intermediaries have very few supports in place. Some leaders report that national forums are the only places they can talk with and gain support from peers with similar experiences, frustrations and successes.⁸⁶ Because sector leaders balance the interests of many stakeholders, they are unlikely to seek unfettered support from any one partner. Finding ways to support leadership of pathways intermediaries, especially during scale-up, is crucial to an organization’s ongoing stability. Creating a support structure can include developing mentors, developing trust with colleagues with whom leadership can be candid or providing time away from

daily operations for reflection or professional development.⁸⁷ Intermediaries can also emphasize hiring staff and leadership that have lived experiences in the communities in which they operate. Research suggests that this can not only create pathways to leadership for groups of people traditionally excluded from leadership roles but also add credibility within a community.⁸⁸

Investing in human capital for sustainability also requires intermediaries to support staff and prioritize retention, reducing the probability of high rates of staff turnover. Staff turnover means continually rebuilding capacity, which can diminish program quality and continuity of operations.⁸⁹ Ensuring that organizational staff has the support needed to succeed at their work is crucial for organizational success. Hiring staff that reflect the communities they serve can also be a critical strategy for ensuring sustainability and success. Additional support structures should be created to ensure that staff feel fulfilled and committed to the mission and goals of the pathways intermediary.

Maintaining deep roots in the needs of the community: When pathways intermediaries look to scale from local and regional organizations to state and national ones, they must ensure they are grounding themselves in the needs of the new communities they are serving.

One major barrier for pathways intermediaries in scaling up their work is recognizing that no two communities have the same needs, and organizations must be nimble enough to design and support programming to reflect regional and local employment needs.⁹⁰ Within an organization originally designed to provide consistency, supporting the internal capacity to respond to these diverse local needs may be an additional challenge. This consistency in program and capacity support is especially critical in rural communities where other alternatives do not exist.⁹¹

What are the implications for stakeholders?

There is growing interest in supporting efforts that connect the workforce and education systems to provide better economic opportunities for all learners. Several implications from the literature affect potential entry points, opportunities and best practices that funders, policymakers and pathways partners—employers, K12 schools, postsecondary institutions and intermediaries themselves—should consider.

Pathways intermediaries need additional support to better deliver on the six core capacities identified in literature, and that support should be identified in collaboration with those most proximate.

- **Funders:** Provide investments to intermediary organizations through direct funding to support intermediaries' programmatic and systems-change work, which includes support for operations and staff. Spend time in communities and with intermediary staff to understand what support is most needed. Ideally, funders are nimble in their giving strategies rather than prescriptive, allowing organizations to use funds toward long- and short-term strategies they have identified and prioritized as important for advancing impact.⁹²
- **Policymakers:** Consider whether and how the legislative process and structure reinforce silos between the K12, higher education and workforce systems, such as considering legislation for each sector in separate committees. Additionally, create and support legislation and policies that remove barriers to enable pathways intermediaries to succeed in their daily work. Examples of promising policies include providing funding incentives for private actors to invest in the public education system and streamlining public funding sources to reduce potential competition between cross-sector partners.
- **Pathways partners:** Develop and maintain strong relationships with K12 and workforce partners that can enable intermediaries to effectively provide pathways programming and technical assistance. Employers, K12 and postsecondary partners should see themselves as critical agents in this work and identify ways to support local pathways efforts.

Cultivate the conditions that enable pathways intermediaries to thrive, including deeply understanding the conditions and context that a pathways intermediary operates within.

- **Funders:** Make certain that funding decisions are made by incorporating the perspectives and voices of those most proximate to the pathways system (i.e., students, parents, teachers, employees) to unearth and elevate power imbalances, community norms and historical context that may influence the success of pathways intermediaries. National foundations should take the time to deeply understand the local context and coordinate with local funders. This will deepen trust and impact.
- **Policymakers:** Support intermediaries at the local, state and federal level by creating policy that enables sustainable public funding (dedicated budget line items and grant programs) and aligns systems in support of pathways (dual enrollment, flexible course credit, statewide transfer agreements). In crafting such policies, focus on incentivizing collaboration across systems rather than inadvertently incentivizing continued fragmentation. Spend time listening to and learning about the needs of stakeholders from different regions to ensure policy decisions and resourcing take into account differences in need and context.
- **Pathways partners:** Create opportunities for students, parents and communities to have a voice in programming decisions to ensure the organization is deeply rooted in the needs of the community that it operates within.



Develop tools, frameworks and relationships that help stakeholders better evaluate how well a pathways intermediary is operationalizing equity into its processes, staffing, partnership management and more.

- **Funders:** Provide funding to pathways intermediaries to create and develop tools and frameworks such as shared data-collection systems, organizational training and equitable design.
- **Policymakers:** Create coherent data and accountability systems to support pathways initiatives in understanding the impact they are having through process, programs and partnership.
- **Pathways partners:** Leverage partnerships and relevant community members to build the systems and tools necessary to embed equitable practices into pathways intermediaries. To address equity in process, staffing and vision, partnerships should include shared responsibility with relevant community members (students, parents, community leaders and employers) and diversity among partners (lived experience, sector and seniority).

Create sustainable and robust funding streams to support pathways intermediaries, especially those in rural contexts.

- **Funders:** Identify other funders—local and national—working to support pathways intermediaries and collaborate and create partnerships to better support intermediaries to provide equitable outcomes for students. Funder collaboratives unleash the power that comes from jointly committing resources to address problems that few, if any, funders could tackle alone. Systems change does not occur quickly, and funders should be willing to fund the time and work needed to drive change.⁹³
- **Policymakers:** Create or support legislation and policy that increases the amount of public funding available to pathways intermediaries and their partners for pathways development aligned to labor market needs.
- **Pathways partners:** Braid together multiple sources of funding such as philanthropic support, federal/state grants and employer assistance to provide organizational sustainability by avoiding an overreliance on one stream of funding.

Recognize and strive to fill the gaps in perspective from researchers of color and researchers at rural institutions in the current body of research.

- **Funders:** Fund researchers of color and researchers at rural institutions to examine the role of intermediaries in creating equitable pathways. Be aware that specific gaps exist in the body of research on intermediaries and that support to further understand these specific areas would help eliminate these knowledge gaps and broaden the field's understanding of pathways intermediaries.
- **Policymakers:** Use policy to create a research agenda that provides grants and resources to researchers, especially those of color and at rural institutions, to increase the research base on pathways intermediaries.
- **Pathways partners:** Tap into new types of knowledge when designing, implementing or evaluating a pathways initiative or intermediary. Conduct culturally responsive focus groups, interviews and community meetings and leverage the knowledge of employers and workforce leaders to gather input that prioritizes voices the academic literature has not historically elevated.



Appendix

Methodology

This literature review pulled from a wide range of previous work focused on intermediaries and specifically included Equal Measure’s ongoing research on codifying pathways intermediaries’ key strengths, capacities, functions and indicators of effectiveness. This literature review placed a specific focus on pathways intermediaries that serve BIPOC students and/or learners from low-income backgrounds as well as those operating in rural geographies, with the intent of identifying both the current body of research and any gaps in what is known about intermediaries working in these contexts.

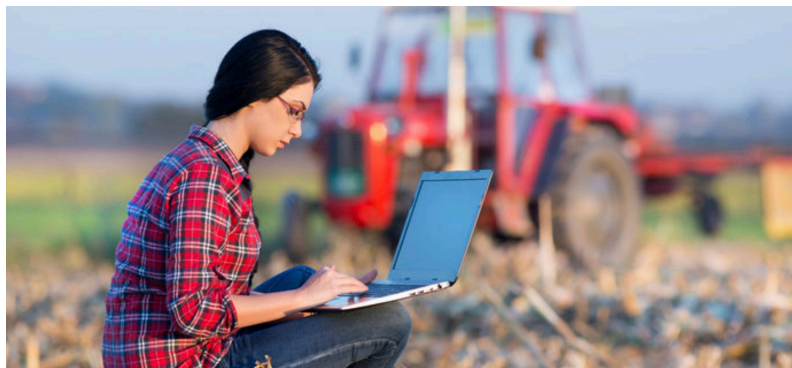
Our team reviewed a total of 52 research resources for potential inclusion. All studies analyzed in the literature review are:

- published after the year 2000;
- focused primarily on intermediaries and/or pathways work;
- written by identifiable authors and organizations; and
- affiliated with reputable organizations or institutions whether that be a postsecondary institution, think tank, nonprofit organization, a governing body or other stakeholders known to impact a pathways intermediary.

Education First prioritized incorporating the perspectives of people who are most proximate to the problems that intermediary organizations are designed to address—namely, students, practitioners and system leaders who would benefit from more well-aligned K12, postsecondary and workforce systems. This was a core component of our methodology because of our perspective that systems-level problems are, at their center, people problems situated in a context that is often neither visible nor well understood. Those who are closest to the issues are the experts of their own experiences and can provide unique insights into designing potential solutions for the types of problems that intermediaries seek to address. We used a codified process to include resources that reflect a diversity of perspectives along lines of race, socioeconomic status, geography and more.

The research team also attempted to prioritize studies for literature review that:

- focused on rural context and geographies;
- received a peer review; and
- prioritized an intermediary’s impact on BIPOC, students experiencing poverty and/or rural students.



After applying these criteria, the research team selected 32 studies from the 52 first considered for inclusion in the literature review. Although many of the included studies have some data points that address our racial and economic equity-focused criteria, there is a need for more in-depth and focused research on pathways intermediaries in rural communities and organizations focused on the needs of BIPOC learners and/or learners experiencing poverty. Future research can benefit from an explicit commitment to understanding the needs and desires of rural intermediaries and BIPOC learners and/or learners experiencing poverty.

Lastly, the research team was focused on including the voices of BIPOC researchers and/or researchers with expertise in rural communities, but this literature review still lacks the diversity of perspectives and experiences we desire. We encourage researchers, funders and intermediaries to continue to elevate more diverse authorship when conducting research intended to benefit pathways intermediaries serving BIPOC learners, learners experiencing poverty and/or rural learners.

Limitations

It is important to acknowledge that the existing literature on pathways intermediaries is limited in several key ways. First, while interest in supporting strong pathways has dramatically increased over the last decade, the existing body of rigorous research is still growing. Much of the current literature is focused on philanthropic initiatives, federal and state funding initiatives or self-generated evaluations from national intermediaries. This focus has the potential to significantly limit the field’s understanding of what an intermediary can be. In addition, much of the literature in this field is produced by a handful of organizations, potentially biasing the findings. It is also important to remember that the authorship of existing literature does not necessarily fully reflect the racial, ethnic or socioeconomic background of the young people that many intermediaries aim to uplift. Future interest in pathways intermediaries can support the goals of publishing authors from more diverse backgrounds and expanding resources and research into this exciting field.

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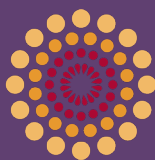
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To learn more about this research or building equitable pathways, reach out to [Kelly Kovacic Duran](#).

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Education First is a national, mission-driven strategy and policy organization with unique and deep expertise in education improvement. Our mission is to deliver exceptional ideas, experience-based solutions and results so all students—and particularly Black, Indigenous and other students of color and students living in low-income communities—are prepared for success in college, career and life. We envision a world in which every student is prepared to succeed—a world in which income and race no longer determine the quality of education. We work closely with policymakers, practitioners, funders and advocates to design and accelerate policies and plans that support strong systems, outstanding educators, engaged students and effective investments.



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