



## Implementing Stackable Credential Pathway Programs

Across the nation, stackable credential pathways are becoming an increasingly popular solution to meet the demands of the changing workforce and student needs. At its core, a stackable credential pathway (SCP) puts multiple credentials into larger degree programs, which allows students to build skills as they go, providing a quick return on investment and multiple on- and off-ramps to continue their education.

In 2017, Mi Casa Resource Center (Mi Casa), in partnership with Metropolitan State University of Denver (MSU Denver), the Community College of Aurora (CCA), and industry representatives advanced this concept to design an equity centered stackable credential pathway program. At the time there was a need in the banking and financial services industry to build their talent pipeline and meet the needs of their workforce. On the other hand, many individuals in the communities who partner organizations served came with existing skills and competencies transferable to entry level roles in banking and financial services. Thus, partners identified the banking and financial services industry to build a SCP and did so in two phases: a design phase and an implementation phase.

In phase one, the design team created a model that centered the unique needs of nontraditional students and informed by the industry to support their workforce. (Read our previous report: [Creating Stackable Credential Programs](#), to learn more about the design features and creation of the SCP program.) As the SCP enters its third year, the focus has shifted from design to implementation. With student success as the main goal, the partner organizations have honed various elements of the design to ensure that the SCP is serving its students well, leading to credential completion, and continuing to align with industry needs.

This report documents the implementation of the SCP and highlights components that are critical to the success of SCP in and out of Colorado. Importantly, the implementation stage documented by this report overlaps with the onset of COVID-19. Postsecondary institutions were strongly impacted by the pandemic, as enrollment was threatened, and institutional budgets were impacted by state budget shortfalls.<sup>1</sup> Thus, the pandemic presented new opportunities and challenges in the implementation of the SCP. The pandemic also served to illustrate the resiliency of an SCP that is industry aligned as enrollment in the SCP continued to grow despite decreases in other programs, and hiring in the banking and financial services sector grows as other industry sectors faced serious rates of unemployment.<sup>2</sup> At the end, we propose some policy recommendations to scale pathways such as this one across the state and in other industries.

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## Components for Success

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While the design phase emphasized convening the right stakeholders and cultivating buy-in, student experience was centered throughout all stages of implementation. Even prior to this collaboration, all the partner organizations were already dedicated to prioritizing support for “nontraditional students” and namely working adults who come from low-income communities and communities of color. The emphasis on supporting these students and employees has been central to each postsecondary institution’s mission and unified partners through the many stages of problem solving that took place. Due to the SCP’s diverse and engaged partnerships across systems and cross-institutional nature, there are four key components a successful implementation of SCP must have:

1. An identified lead organization to facilitate and sustain SCP
2. Ongoing co-development and engagement with industry and postsecondary institutional partners at all stages
3. Unique navigational supports for students to navigate within and across the multiple institutions
4. Access to affordable and transferable credentials

We discuss each of these components in turn to illustrate how student-centered implementation leads to a successful SCP, especially when having to navigate a diverse array of actors.

### Pathway Ownership

A unique element of the SCP is the active collaboration across myriad organizations and partners from different sectors. Within an inherently decentralized pathway, designed to be flexible and accessible for students in many different stages, it was critical for one organization to lead the SCP development. In the banking and financial services SCP, Mi Casa was identified by other partners as a natural fit to the lead implementation because:

1. It already supports clients across a variety of life needs, including connecting clients with rental assistance, child care support, workforce development and economic advancement opportunities through career skills programs, and other types of resources and supports.
2. As a nonprofit, it is well positioned to lead fundraising efforts.
3. As a nonprofit, it has greater flexibility to navigate across institutions and convene different types of organizations.

Having a lead organization was critical to address new challenges as they emerged, and implementation issues were addressed collectively versus from the perspective of one single organization. Mi Casa approached its role as a lead organization from a student-first perspective. This began with process mapping conducted by Mi Casa to better understand, from a student’s perspective, the different steps necessary to navigate the pathway. Where possible, partners convened and identified redundancies in steps and removed those. Ulti-

mately, Mi Casa would hire a full-time student navigator to facilitate this process. (See below for example process mapping for MSU Denver.)

## Pathway Steps for Incoming MSU Denver Students

~~—~~ = Step removed by process mapping

~~Application - first-time college student~~

Application - transfer student

Apply for COF funds

Meet with business college advisor

Take accuplacer test

Be admitted to MSU

~~Visit access center~~

~~CLEP exam~~

Portfolio/Interview

Program challenge exam

Receive PLA signatures

~~Send transcripts from CCA~~

Financial aid-FAFSA

Financial aid-FAFSA processing

Financial aid-document retrieval

~~First-time student orientation~~

Transfer student orientation

Meet with advisor

~~Register for classes~~

Buy books

~~Get student ID~~

~~Buy RTD pass~~

Pay tuition

Payment plan

~~Parking~~

~~Immunizations~~

Apply for scholarships

Banking scholarships

Time Saved: ~ 5 Hours  
Money Saved: ~ \$500



Student-first perspectives guided Mi Casa’s decisions on SCP investments, operations, and development. Mi Casa hired a project director, and, eventually, the student services coordinator, feeling both were necessary to support the implementation of the program. The number of partners and participating institutions meant that for students to be able to seamlessly navigate the SCP steps, each institution had to meet students where they were in the pathway process. In practice, this required Mi Casa’s project director to lead ongoing monthly working meetings with partner organizations to identify and discuss emerging issues. In these meetings, SCP leaders from each partner institution discuss and propose solutions to issues, mark student progress along the pipeline and brainstorm improvements to the SCP for students. This process allowed each institution to responsively address issues as they emerged.



## Pathway Ownership in Practice

**Investing in program staff:** One of the first key elements of investing in the SCP was hiring a program director at Mi Casa. Mi Casa’s fundraising for the SCP focused on securing funding for the program director and program navigator. The project director was charged with developing and implementing the SCP (see appendix for a full job description of program director role). The project director convenes and identifies new partners and stakeholders; problem solves at different levels, from the individual student level to the cross-institutional level; and ensures the SCP remains on track with myriad components of administration. The project director also gathers data quarterly from each partner as well as compiles and submits reports to funders.

Mi Casa also secured the funds to hire a student services coordinator (see appendix for a full job description of student services coordinator role). This coordinator is unique to the SCP – having a program-specific coordinator carried several unique benefits. First, by being housed at Mi Casa, the student services coordinator has a lighter caseload than institution-specific navigators and advisors. Additionally, the student services coordinator is cross institutional by nature, allowing them to convene support teams at different institutions, rather than being tied to the resources at a single institution.

The flexibility afforded to Mi Casa’s SCP staff is critical to addressing needs for students, but also ensuring the pathway is working cohesively. While the staff are hired by Mi Casa, they work in service of the pathway, and in that regard, are a resource for all the partners, beyond Mi Casa. However, having staff who were solely dedicated to implementing and advancing the SCP was critical to maintaining engagement over multiple years of implementation, amidst leadership changes, COVID-19, and other external shocks that can derail the implementation of any program.





## Key Lesson Learned for Replication

Responsibilities of a lead organization go beyond convening partners. Mi Casa's leadership meant investing significantly in staff who were dedicated to driving forward the program. This decision led to unique costs that were borne by Mi Casa that other organizations did not have to invest in, but from which they all benefited. In replicating SCPs, it is important to consider which organization will take on the leadership role. When identifying a lead organization, partners should consider:

1. What staff capacity will need to be added to sustain the program?
2. Is our organization committed to bearing the costs of leading the program? Is this program integral to our mission?
3. Does our organization have or is willing to develop the capacity to convene partners and stakeholders for sustained engagement throughout implementation?

### Industry & Institutional Partnerships

Part of Mi Casa's leadership included convening partners and continuing to cultivate relationships with industry, institutions, and other community-based organizations. An emphasis on relationship building helped mitigate the need for reinventing the wheel in every circumstance. Developing partnerships is beneficial as it helps create a more accessible pathway; however, building partnerships also requires having buy-in at many levels, which is often time consuming.

On the industry front, Mi Casa continually engaged industry partners well beyond the development stage. For example, Mi Casa invited industry partners to twice annual meetings with other SCP partner organizations. These meetings provided critical opportunities to communicate

challenges and opportunities to industry partners. Beyond asking "What is needed?" from a coursework perspective, partners were able to communicate trends in the industry to allow institutions to be more responsive and proactive in their curricula. This opportunity for information sharing was especially important amidst a pandemic that caused substantial shifts in industry and workforce demands. Additionally, this engagement allowed for iterative brainstorming for challenges. For example, one key barrier to SCP access identified by industry partners was a lack of awareness of the SCP. By having institutions and industry partners at the table, all were able to brainstorm individual steps at each sector to improve program visibility, as well as the types of information that could be beneficial to proving to prospective students the value in participating in the pathway.

In addition to problem solving for gaps or misalignment across the system, they also provided an opportunity to identify how to improve enrollment and participation, as well as level-setting on priorities across the ecosystem. For example, all partners identified a growing emphasis on supporting and providing opportunities for communities of color, both for existing staff but also in attracting new staff that are more diverse. Communities of color are vastly underrepresented in mid- and upper-level positions, so entry into careers with advancement opportunities is essential for supporting the economic development of our communities.<sup>3</sup> However, there were some differences in skillset needs in local credit unions, compared to national banks. The former saw a greater emphasis in sales at their local branches, while the national banks identified a greater need in IT skills amongst their applicants during the pandemic. While not all these disparate needs could be immediately addressed, department chairs from the institutions tried to identify shifts in coursework and sequencing that could help address some of the growing needs at different financial institutions.

On the postsecondary institution front, monthly partner meetings were one of many opportunities for cross-institutional connection. However, while monthly partner meetings emphasized coordination and problem solving, they also illustrated the need for institution-wide buy-in. When a pathway is designed for students, rather than by institutions, it must account for the ways people move through systems, nonlinearly.

For this reason, it was important to not simply have instructional departments onboard, but to also have the buy-in from leadership, student services departments,

and so forth. This is because, for example, in a student-centered design, credits and credentials follow the student across many institutions and places of learning. This model contravenes the typical institution-centered model where credits are earned by a student toward a degree at that institution. To shift to a student-centered model required institutional systems to adapt so credits can follow students even if it's toward a degree at another institution. This was facilitated, in practice, by articulation agreements among the partners which delineated how these transfers could occur. In brief, authentic partnerships required generating buy-in from whole systems, not parts of the system, so each component could center on students. For the partners in this SCP program, mission alignment helped ease the development of such partnerships.

## Key Benefits of Ongoing Industry Involvement



**Open communication  
& problem solving**



**Firsthand experience  
of employee investment**



**Long-term buy-in  
from industry partners**



**Financial investment  
in shared mission**  
(i.e. paying for PLAs)





## Partnerships in Practice

**Frequent and deep engagement:** Industry feedback precipitated the design of the SCP. However, industry engagement was not limited to the initial request for updated curricula. Rather, industry partners were engaged consistently throughout the design and implementation process to continue iterating through curricular needs. This feedback loop was particularly critical during the pandemic, as businesses required new skillsets from employees due to shifts in the ways that businesses could operate and a continually changing economy.

By seeing real-time shifts to curricula and program offerings as a result of their engagement, industry was willing to continue investing in the SCP. One industry partner, for example, paid for their employees' PLA exam fees. If the employees passed, this is the equivalent of employers paying for the course credit of the tests. Ultimately, this helps employees continuing to work their way through a postsecondary credential in their industry. Employers gain timely and relevant skills, and employees continue to gain opportunities for advancement when they complete credentials. However, this collective buy-in that leads to better outcomes for employees, employers, and postsecondary partners is based in the frequent engagement that ensures the SCP is responsive to the needs of industry.



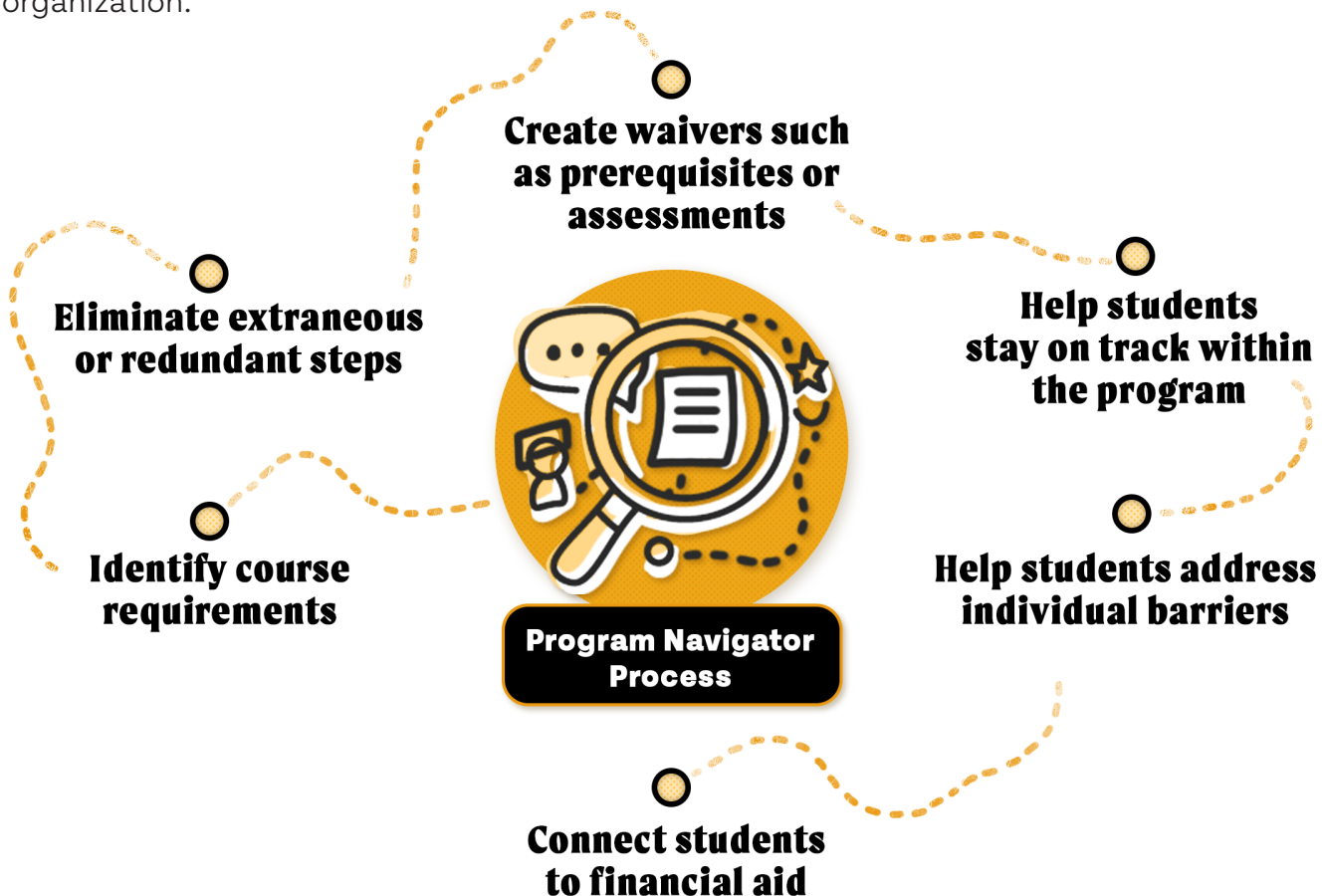
## Key Lesson Learned for Replication

**Industry engagement first:** The SCP was catalyzed by industry engagement. While Mi Casa led the development of the SCP, industry engagement from the beginning was key to the program's conception and success. When replicating this model, it is critical industry engagement is the first step of program development. By starting with industry partnership, program developers can ensure the SCP is responding to ongoing shifts in the workforce. This helps align postsecondary, education, and workforce development partners, to ensure their content is aligned with the needs of industry. In short, starting with industry helps guarantee SCP development is focused on skills-based learning that will translate to real gains in the workforce. Further, industry buy-in helps create a positive reinforcement loop wherein they will be willing to reinvest in the pathway if they are able to see, in real time, the value of their engagement.

## Cross-Institutional Navigation

Traditionally, navigation has focused on ensuring students have the knowledge about what next steps need to be taken and when, to successfully complete a program. This may include information and connection to additional resources and supports. This is certainly part of the cross-institutional navigation services SCP partners aim to provide. However, during the implementation stage, the focus on navigation supports centered on streamlining processes across institutions to try to eliminate barriers that naturally exist when merging disparate systems. Thus cross-institutional navigation refers not only to support staff who help program participants navigate the pathway, but also to the process of reducing barriers and ensuring faithful implementation of the SCP across each participating organization.

To support both these efforts, Mi Casa hired a student services coordinator to focus primarily on cross-institutional navigation of students across the pathway. Ultimately, this position will primarily support students to navigate the SCP. However, during implementation, the coordinator's position focused on process mapping and identifying barriers across the whole program. In addition to documenting all the necessary steps a student will navigate in successfully completing the SCP, the coordinator helps ensure support staff at each institution – such as academic advisors, administrative staff, and instructors – are all aware of the program so they can support students within their own institution.







## Navigation in Practice

**Investing in processes:** There are two benefits to the coordinator position based at Mi Casa. First, the coordinator is specific to the pathway, ensuring students are well supported across each partner organization. By being a pathway-specific coordinator, they have a smaller caseload than institution-based navigators or counselors and can help students at any stage of the pathway. Secondly, the SCP coordinator helped create process improvements by thinking of ways navigation of the pathway overall could be improved. This included significant relationship building with staff at all levels at each participating institution. Therefore, the success of reducing barriers and easing cross-institutional navigation rests not only in a position dedicated to that, but in a cross-institutional commitment to eliminating unnecessary steps. Moreover, supporting the SCP that transcends instructional staff, buy-in must be organization wide because successful implementation involves players at every level of an organization.



## Key Lesson Learned for Replication

Approaching navigation from a barrier-reduction perspective required investing significant resources in interrogating internal processes. Changing these processes requires adjustments at every level of an institution; so widespread buy-in is critical. To facilitate these process changes, Mi Casa invested in a cross-institutional navigator. This role is helpful, but not necessary, to addressing cross-institutional barriers. A commitment to process mapping and reducing barriers, from a student-first perspective, is essential to successful navigation. This may include adjustments in requirements at an institution, developing new prior learning assessments or processes for SCP participants, and more.

## Credential Access & Affordability

Prior learning assessments (PLA) are the building blocks for the SCP. PLAs refer to a wide array of methods to assess whether a student has gained knowledge through work-based learning or courses at another institution to gain credit at the institution they are attending. Essentially, it is a way to “test out” of requirements while gaining course credit for completion. PLAs can take on many forms, but most commonly they are written and multiple-choice tests that help students demonstrate sufficient knowledge to gain credit for a course.

Nationally, students who use PLAs can, on average, save a semester’s worth of courses and are twice as likely to complete a credential as non-PLA users.<sup>4</sup> SCP participants use more PLAs than the national average, as they are the mechanism that are used to navigate across the institutions. Using PLAs, students can save roughly \$18,000 on the full degree cost if the pathway is completed.<sup>5</sup> These costs savings to students still result in a net positive return on investment for the institutions, especially as enrollment increases since they are gaining students who otherwise would never have enrolled.<sup>6</sup> However, two key challenges have arisen and persist in

using PLAs to award credits to students. First is the cost to students, which, while nominal, can still present a barrier because unlike other education-related costs, PLAs are often paid for out of pocket as federal student aid cannot be used to cover PLA costs. Second, there is the ongoing challenge of having sufficient PLAs in place that can account for the plurality of work-based learning that occurs.

To address the first challenge, the SCP partners stepped up to help students pay for the cost of PLAs. Recognizing the value of students’ professional development, some industry partners agreed to pay for PLAs that align with their work-based learning to get started on the SCP. Mi Casa also began paying for PLAs on behalf of students that began on the pathway at Mi Casa. This reinvestment into students illustrates the genuine buy-in from both industry and organizational partners. To address the second challenge, institutional partners were flexible in developing new PLAs for the SCP to ensure participants’ learning was being honored.







## Credential Access in Practice

During the COVID-19 pandemic, a switch to online proctoring and courses helped widen access to PLAs because it allowed for working adults to take courses on their own schedule. This shift underscores the point: PLAs are only useful insofar as they can be taken by students. The scheduling barrier is one that has been decreased by COVID-19, where before students may have needed to shift schedules or arrange for child care in order to take online courses to pass a PLA.

A continuing barrier in Colorado is the cost of PLAs. Costs can vary as each institution decides on the cost for their PLAs. One common way PLAs are administered statewide is through the College Board's CLEP exams. These exams cost \$89 each, and some institutions may charge additional proctoring fees.

In the SCP Mi Casa has committed to paying for PLAs for their participants. Additionally, one local industry partner also committed to paying for the PLAs for their employees. However, it is critical to consider how this barrier can be reduced for students across the state, and not merely participants from Mi Casa or at a particular employer.

Lastly, SCP partners were committed to ensuring students with prior learning could get credit for their past work, regardless of whether the PLA already existed. To this end, MSU Denver faculty designed new PLAs where they were needed. If there was sufficient need, faculty wrote new PLAs for mass administration. If the circumstance was unique, a portfolio assessment strategy was used as an assessment to grant credit. The flexibility of assessment options, and willingness to develop new PLAs as the need arose was critical to centering students and ensuring that SCP costs to students remain low.



## Key Lesson Learned for Replication

PLAs are a critical tool to keeping to the SCP's goal of affordable and short-term credentials. There are two key components for success to ensure PLAs can be used to help honor students' learning:

1. PLAs should be free for students to take. In replicating an SCP, it is critical to identify sustainable funding sources for PLAs. Other states and postsecondary systems do not charge students with the cost of PLAs; this is a model that may be considered.<sup>7</sup>
2. PLAs should be diverse and flexible to capture many different types of learning that have occurred throughout a student's life. To wit, PLAs offered should not be limited to assessments for introductory courses, rather they should be developed and considered for any course where a student already has comparable and demonstrated knowledge and learning.

Both components emphasize a student-first rather than institution-first approach to PLAs. However, as a recent study released by the RPK Group shows, this cost to institutions is still beneficial in the long run as they gain a student that otherwise would not have enrolled.<sup>8</sup>



## Policy Recommendations

SCPs have proven to be a strong strategy toward addressing existing equity gaps in educational and workforce outcomes. They help students quickly gain skills in in-demand industries, while having affordable credentials that provide a return on investment. These policy recommendations are to help ensure SCPs are accessible statewide and effectively implemented so all Coloradans can benefit from having their work-based learning apply toward credentials.

### **1. Facilitate the development of statewide articulation agreements and make it easier for out-of-state institutions to develop articulation agreements with Colorado's public institutions.**

Developing these articulation agreements helps guarantee whichever institution a student attends, their past coursework and credits follow them without any losses. Since SCPs rely on partnerships across two- and four-year institutions, it is critical postsecondary institutions develop mechanisms for easy transfer of credits. This is essential for ensuring bureaucratic barriers associated with cross-institutional navigation are mitigated for students. Additionally, this is critical to honoring the learning of students, regardless of where that learning occurs.

### **2. Ensure that PLAs are affordable, accessible, and uniform across institutions.**

First, affordability is critical to ensuring PLAs can be taken by students. Two strategies can help meet this goal: First, student financial aid, including scholarships and grants, should be flexible enough to be used for PLA fees;<sup>9</sup> and secondly, states and postsecondary institutions should consider subsidizing PLAs for their students.

Next, PLAs should continue to be flexible in form and in scheduling. Postsecondary institutions should consider different types of assessments and the development of new assessments for students when there is a demonstrated need. Additionally, PLAs should continue to be offered online in addition to in-person testing to maximize accessibility for nontraditional students.

Last, to the extent possible, institutions should strive to make PLAs uniform. This can include sharing PLAs that have already been written across postsecondary institutions with articulation agreements. This helps ensure wherever a student may reside, they have equal opportunity to demonstrate learning, and access PLAs.

**3. Task the Colorado Workforce Development Council (CWDC) with developing discrete career pathways in industries that are projected to have high growth and with high levels of industry engagement.**

Career pathway development that incorporates SCPs is critical to ensuring more students across the state are going to in-demand fields while continuing their education. As the SCP demonstrated, industry partnership is critical to a successful SCP. Additionally, the state produces projections around where economic development and industry growth will be occurring. Developing three to five discrete pathways in growing industries with high levels of engagement is a promising way to increase the number of Coloradans who can access postsecondary credentials that will lead to higher earnings.

Mi Casa's leadership in developing the financial services SCP illustrates how critical it is to have an organization take the lead in developing and implementing a SCP. In order for SCPs to be developed and scaled statewide, it is critical to ensure an organization is taking a leadership role in creating and implementing pathways. Given its intersectional nature, this could be housed within the CWDC to actively involve both postsecondary and industry partners. Wherever this body is housed, it should prioritize creating a framework for new pathways to be developed more easily by overseeing the implementation of the above recommendations.



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## Endnotes

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- 5 Glover, H. (March 18, 2020) “Community-Based Organizations help students gain valuable work skills quickly.” Medium.com. <https://medium.com/todays-students-tomorrow-s-talent/community-based-organizations-help-students-gain-valuable-work-skills-quickly-487167064f29>
- 6 Desrochers & Osiecka. (February 2021.) “Financial Services Pathway: Leveraging Partnerships & Prior Learning Assessments to Build a Stackable Credential in Metro Denver.” RPK Group. [http://rpk-group.com/wp-content/uploads/2021/02/rpk-GROUP-MCRC\\_CCA\\_MSU-Financial-Services-Pathway-Case-Study-2.18.21.pdf](http://rpk-group.com/wp-content/uploads/2021/02/rpk-GROUP-MCRC_CCA_MSU-Financial-Services-Pathway-Case-Study-2.18.21.pdf)
- 7 Johnson & Glover. (April 2021.) “Innovative college-employer partnerships point toward a brighter future.” Medium.com <https://medium.com/todays-students-tomorrow-s-talent/innovative-college-employer-partnerships-point-toward-a-brighter-future-3c79feeee763>
- 8 Ibid.
- 9 Garcia & Leibrandt. (November 2020.) “The Current State of Prior Learning Policies.” CLASP. <https://www.clasp.org/publications/report/brief/current-state-prior-learning-policies>

## **Appendix 1:** Example Pathway Job Descriptions - Project Director

**Position Title:** Project Director

**Department:** Agency Operations

**Reports To:** Director, Strategic Initiatives

**FLSA/ Status:** Exempt/ Full time – Time-limited role

**Job Family:** Director

**Revised:** September 2019

### **Who We Are**

Mi Casa Resource Center (MCRC) is committed to creating pathways to opportunity for low-income and underserved individuals. For more than 40 years, we have provided nationally recognized workforce, business, and youth development programs throughout Metro Denver. Currently, MCRC educates, trains, and supports youth and adults on their path to economic success. Additionally, MCRC partners with the area's most respected organizations to provide economic and educational services to assist families to achieve their economic goals and realize their dreams.

In partnership with the Community College of Aurora (CCA), Metropolitan State University of Denver (MSU Denver) and local banks and credit unions, MCRC has built a first-of-its-kind financial services industry pathway to on-ramp adult learners to meaningful employment and post-secondary credentials simultaneously. Mi Casa will provide backbone support for the full build-out of the pathway from September 2019-December 2021 through a project operations team consisting of a Senior Project Manager, Industry Liaison and Student Navigator. The project operations team will support partners connecting 300 + adult learners to credentials with an overarching goal of building a model that can be replicated across industries, institutions and geographies.

### **Position Summary**

The Project Director is responsible for the implementation and successful execution of the Financial Services pathway project workplan. This unique role will both provide support to each partner entity respectively (Mi Casa Resource Center (MCRC), Community College of Aurora (CCA) and Metropolitan State University of Denver (MSU Denver)) and the partnership itself to ensure that students move to and through credential opportunities. The Project Director will supervise the project operations team consisting of an Industry Liaison and Student Navigator, manage a \$1 million project budget, and execute a scope of work with four focus areas: design, operations, research, reporting and replication.

### **Key Responsibilities**

#### **Leadership**

- Lead execution of Financial Services pathway workplan
- Lead collective impact framework
- Supervise partnership operations team



- Hold partners accountable for achieving milestones and institutionalizing processes outlined in the workplan

### **Participant Interaction**

- Develop and streamline processes to move students to and through credentials at each partner entity
- Supervise student navigation support

### **Operational Tasks**

- Collective impact – Provide structure, documentation and continuity for the pathway partnership. Organize monthly meetings, keep stakeholders informed of progress, deadlines
- Grant management – Manage communication/reporting processes for grants associated with Financial Services pathway
- Data/Evaluation management – Generate and pull reports on project results. Develop data-sharing agreements/protocols. Develop a streamlined evaluation process across entities.
- Operations management – Spearhead efforts to develop processes for recruitment, student navigation, industry engagement (with banks and credit unions) and evaluation
- Communications management -Lead efforts to document learnings (in partnership with Bell Policy Center, Lumina Foundation and others), develop communication tools for recruitment and replication and proactively seek opportunities to share learnings to spur replication among partners, other local entities and national networks

### **Independent Judgement**

- Adjust project plans, resource allocation as appropriate/necessary.
- Develop strategies for accountability as appropriate with each partner entity and for the partnership itself.
- Evaluation
- Supervise partnership evaluation efforts, ensuring that accurate, complete information is provided to funders on a timely basis.
- Create a feedback loop to help information surfaced in evaluation efforts to inform program design.

## **Qualifications**

### **Required**

- Minimum 10 years of experience in program/project management with skills in project planning, budgeting and reporting .
- Minimum 2 years of staff supervision/management experience
- Demonstrated subject matter expertise in economic mobility, post-secondary education, equity issues.
- Demonstrated passion for connecting communities of color to post-secondary credentials.
- Extensive experience in building and maintaining cross-sector partnerships.
- Data management experience systems' platforms common to non-profit and/or higher ed. Experience in developing and generating reports.

- Demonstratable knowledge of MS Office Suite.
- Bachelor's degree in related field, Masters degree a plus
- Current Colorado driver's license, good motor vehicle record, and current automobile insurance.
- Ability to be flexible and work evenings or weekends.

**Preferred**

- Experience in coordinating inter-institutional, cross-sector programs/projects
- Experience in managing a collective impact framework
- Work experience in non-profit sector or higher education or both.

**Key Competencies**

- Ability to effectively manage the interests of multiple stakeholders
- Systems' thinker with a bold and proactive approach
- Ability to take initiative and work independently
- Excellent communication and relationship building skills
- Ability to manage strategic partnerships
- Budgeting and grants management skills
- Excellent analytical and project management skills



## **Appendix 2:** Example Pathway Job Descriptions - Student Services Coordinator

**Position Title:** Student Services Coordinator

**Department:** Collective Impact

**Supervisor:** Project Director, Financial Pathways

**FLSA/ Status:** Non-Exempt/ Full time

**Job Grade:** 4

**Hiring Range:** \$45,000 -\$50,000 per year

**Revised:** September 2020

### **Who We Are**

Mi Casa Resource Center (MCRC) has partnered with Community College of Aurora (CCA) and Metropolitan State University Denver (MSU Denver) to create The Financial Services Pathway, a cross-institutional, first-of-its-kind, stackable credential model in which students are connected to promising career pathways and post-secondary credentials for the Financial Services industry simultaneously.

The pathway begins with an industry exploration training at MCRC that prepares completers for an entry level position in a bank or credit union, at which point they can begin one of the two banking certificates offered at CCA and complete the pathway with the Bachelor of Science in Banking at MSU Denver. Along the pathway, students have the option to test out of classes through Prior Learning Assessments (PLA). MCRC acts as the backbone organization supporting the higher education partners, financial services industry partners, and Mi Casa Career Pathways program.

### **Position Summary**

Mi Casa Resource Center is seeking a proactive individual with excellent communication skills and experience in advising, student services or higher education to join as Student Services Coordinator.

The Student Services Coordinator's primary job functions are to increase enrollment, connect more students to PLA opportunities and improve student retention across the pathway. The coordinator advises students through enrollment, retention, and completion in each institution along the Financial Services Pathway. They meet with students to decide their next steps by evaluating their prior work experience and career & academic goals. They act as the liaison between the student, higher education institutions and industry partners, working closely with the advising and support staff at each institution to determine the best action plan for student success. The coordinator meets frequently with students, primarily first-generation college students, to help them work through obstacles, connect them to additional supports at the colleges, and to create a roadmap to achieve their career and academic goals. In addition to supporting students through enrollment, the coordinator also partners with staff at each institution to support recruitment of students into the pathway. This position is grant funded through December 2021 and the goal is that additional funding will be obtained to extend employment.

## Key Responsibilities

### Student Interaction

- Works one-on-one with students in the Financial Services Pathway to identify personal barriers that are impacting their success in college.
- Tracks student progress in and out of the pathway.
- Addresses barriers by coming up with creative solutions and connecting students with in-school and local community service providers and resources.
- Monitors and tracks all students' progress within Salesforce database.
- Outreaches, establishes and maintains close referral relationships with higher educational institutions, service and training providers to create a robust detailed and reliable referral directory.
- Develops individualized academic plans for students who enter and exit the pathway and maintains a comprehensive program plan providing desired results.

### Recruitment

- Collaborates with staff at each institution to support and participate in recruiting events.
- Partners with financial services partners to recruit from current bank or credit union employees.
- Represents the Financial Services Pathway at public speaking engagements, community events and training opportunities.

### Partnership Management

- Works closely with the Business College advisors at Community College of Aurora and Metropolitan State University Denver, and the Career Pathways team at MCRC.
- Collaborates with other college staff teams to provide resources to students.

### Evaluation

- Works with team members at each institution to oversee and implement the administration of Prior Learning Assessments (PLA) for students.
- Oversees tracking and reporting of student progress in MCRC's database.
- Tracks data and prepares reports as necessary.

## Qualifications

- Bachelor's degree or a combination of education and experience.
- Two to four years of advising, student support services, or higher education experience.
- Two to four years of experience working with diverse populations and/or first-generation college students.
- Computer experience with word processing, spreadsheet and database management.
- Knowledge of Denver-area higher education institutions, community-based organizations and resources.
- Occasional evening and weekend work.
- Background check is required.
- Bilingual English/Spanish is preferred but not required.



## **Key Competencies**

- Proactive communication with multiple stakeholders
- Familiarity for strength-based coaching and intrusive advising
- Respect for low-income and diverse communities
- Understanding of the barriers facing first-generation college students