LEARNING FOR LIFE:

THE OPPORTUNITY FOR TECHNOLOGY TO TRANSFORM ADULT EDUCATION

PART II: THE SUPPLIER ECOSYSTEM

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The Joyce Foundation

We would like to express our gratitude to the Joyce Foundation for their support of our research and for their part in making this report possible. We are honored to be partners in their mission to improve the education, economic opportunity, and social well-being of our society.

THE OPPORTUNITY FOR TECHNOLOGY IN ADULT EDUCATION

In fall 2014, Tyton Partners (formerly Education Growth Advisors), with support from the Joyce Foundation, conducted national research on the role and potential of instructional technology in the US adult education field. The objective was to understand the current state of the field with respect to technology readiness and the opportunities and challenges for increasing the use of technology-based instructional models within adult education.

*We define adult education as **instructional training programs that help underprepared adults develop basic skills in the areas of literacy, numeracy, and digital literacy**. This analysis draws on extensive primary and secondary research, including a national survey completed by more than 1,000 adult education program administrators and practitioners, interviews with more than 50 adult education experts, and a comprehensive scan of secondary research materials to frame and size the adult education landscape. Through the two publications in this series, we present the findings from our research and propose key questions and ideas to catalyze conversations among adult education leaders and practitioners, policy makers, education suppliers and entrepreneurs, and foundations and funders regarding the gaps in the adult education system and opportunities for leveraging technology to better meet the needs of underprepared adult learners.*

The initial publication in the series, Part I: Interest in and Aptitude for Technology, *focused on demand-side dynamics and addressed adult education administrators' and practitioners' perspectives on the role and potential of technology to support their students' needs and objectives. This second publication,* Part 2: The Supplier Ecosystem, *highlights market composition and supply-side dynamics, instructional resource use, and opportunities for innovation.*

Executive Summary: *Over the past decade, innovations in learning technologies have impacted nearly all preK–12, postsecondary, and corporate and professional learning environments. Billions of dollars have been invested in educational technology businesses, driven by the promise of technology to transform student learning and achievement. Examples of these innovations are online courses, personalized learning platforms, free and open educational content, mobile and gamified learning, and social collaboration platforms, among numerous other developments. To date, investments in these businesses have had limited impact on the adult education field, even though the vast majority of adult education professionals are enthusiastic about the potential of technology to support instruction, as revealed in* Part I: Interest in and Aptitude for Technology. *This disconnect is a missed opportunity to apply our best and most creative entrepreneurial education efforts to a large community of adults with critical needs.*

Current and aspiring educational technology providers, as well as funders, should take a closer look at the adult education market. The social impact opportunity in adult education – to improve the welfare of millions of individuals, our economy, and our nation's competitive position – is undeniably large, and so is the prospective financial opportunity.

Currently, 4.1 million students are actively enrolled in programs within the adult education system. Adult education is supported by nearly $10 billion in annual funding, of which an estimated $800 million is spent on third-party instructional materials. Of this instructional material spend, the portion allocated to digital or technology-based solutions is growing most rapidly. Moreover, 32 million additional low-skilled adults are outside the adult education system today. These adults need services and could be reached through creative, alternative strategies that could drastically expand the capacity of the current system. Meanwhile, minimal supplier competition exists in the adult education market. While thousands of providers are competing for customers, dollars, and mindshare in the K–12 and postsecondary arenas, the adult education space by comparison is a greenfield opportunity.

Our analysis of the adult education community highlights the desire of program leaders, instructors, and other stakeholders to have greater access to dynamic, technology-based solutions that are aligned to the needs of adult learners. To achieve this, the current collection of adult education solutions must be enhanced and expanded to better meet customer needs. In "The Adult Education Solution Landscape and Opportunities for Innovation" (see page 8), we highlight four product expansion issues – target market orientation, solution modality, delivery platform, and business model – and offer a set of targeted, pragmatic considerations for suppliers as they evolve their offerings to align with market conditions.

To capitalize on the opportunity for and strong interest in learning technologies from the field, the adult education community should continue to address structural challenges that hinder the market's efficiency. Efforts to reduce sales channel fragmentation, augment support for educational programs' procurement efforts, and create greater leverage with program funding resources will directly benefit suppliers active in the market, as well as those entering it. In "Promoting Market Expansion and Efficiency" (see page 14), we highlight strategies and initiatives that encourage innovation, enhance the market's efficiency for suppliers, and facilitate greater adoption of technology-based instructional models.

This second paper in Learning for Life: The Opportunity for Technology to Transform Adult Education *explores issues relating to market opportunity and efficiency, while analyzing the composition of the supplier ecosystem, current use patterns, and opportunities for innovation.*

THE MARKET OPPORTUNITY

While billions of dollars in investment have poured into the education sector over the past decade, few of these dollars have made their way into the adult education market, and too few entrepreneurs and established providers are focusing efforts on building solutions for low-skilled adults. Although not without its challenges, the market opportunity in adult education may be larger and more attractive than what is perceived by many stakeholders both within and outside the field.
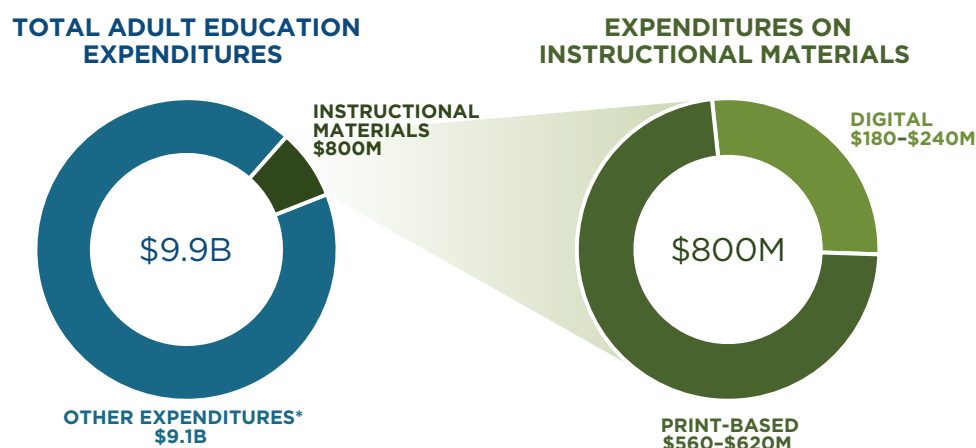
Today, nearly $10 billion in funding – including public and private dollars – flows into the adult education system annually, supporting 4.1 million adults across a variety of program areas and educational delivery channels.

DISTRIBUTION OF ADULT EDUCATION FUNDING
BY PROGRAM AND EDUCATION DELIVERY CHANNEL

TOTAL = $9.9B
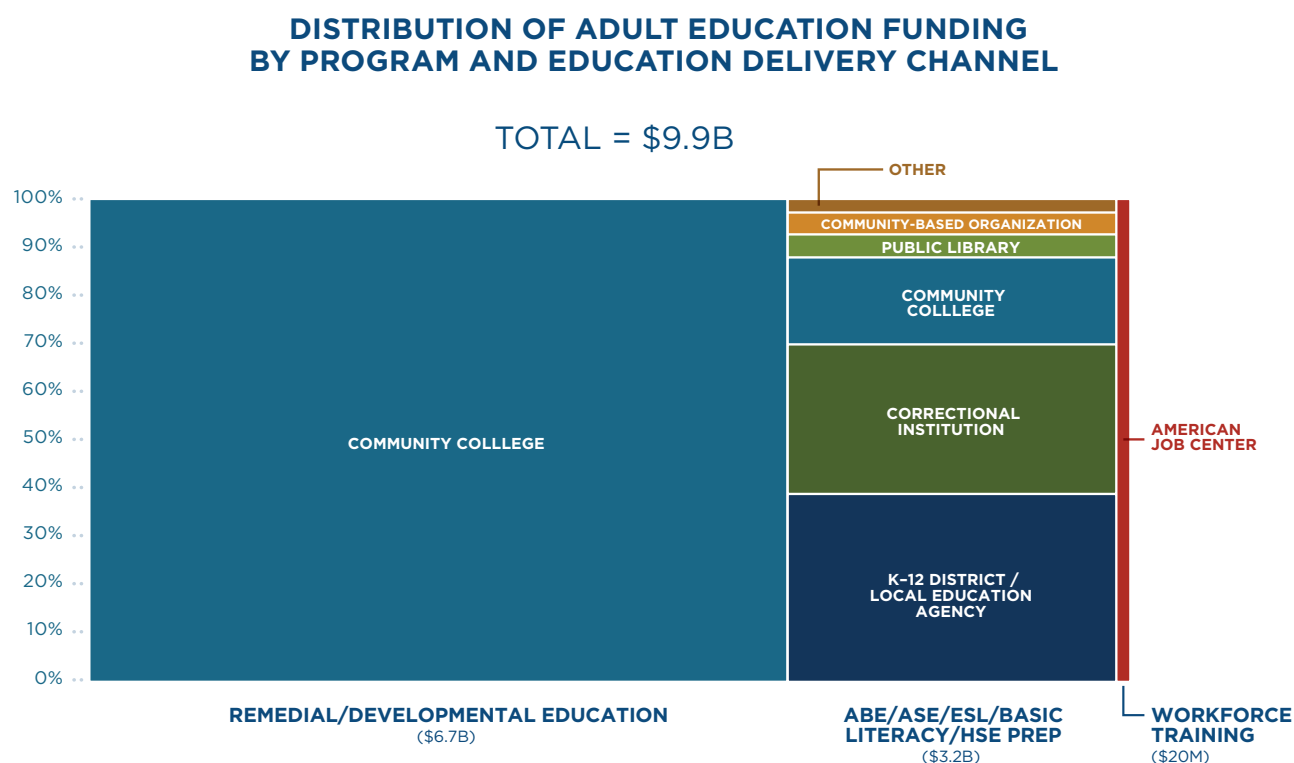
Based on data from survey respondents with budget visibility, we estimate that nearly $800 million of the $10 billion is dedicated to expenditures on third-party instructional materials, and approximately 23% to 30% of that spending – or $180 to $240 million – is devoted to digital[1] instructional materials.

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1. Digital materials include technology-enabled instructional programs and resources, as well as blended offerings that integrate technology-enabled solutions and print-based materials.

INSTRUCTIONAL MATERIALS EXPENDITURES IN ADULT EDUCATION PROGRAMS, PRINT VS. DIGITAL

TOTAL ADULT EDUCATION EXPENDITURES

EXPENDITURES ON INSTRUCTIONAL MATERIALS

INSTRUCTIONAL MATERIALS $800M

$9.9B

DIGITAL $180–$240M

$800M

OTHER EXPENDITURES* $9.1B

PRINT-BASED $560–$620M

* "Other Expenditures" includes all spending categories less instructional materials (e.g., administration, instructional staff, student support services).

This data represents a starting point for understanding the market opportunity for digital instructional materials and their current penetration in adult education. Additional factors to consider include:
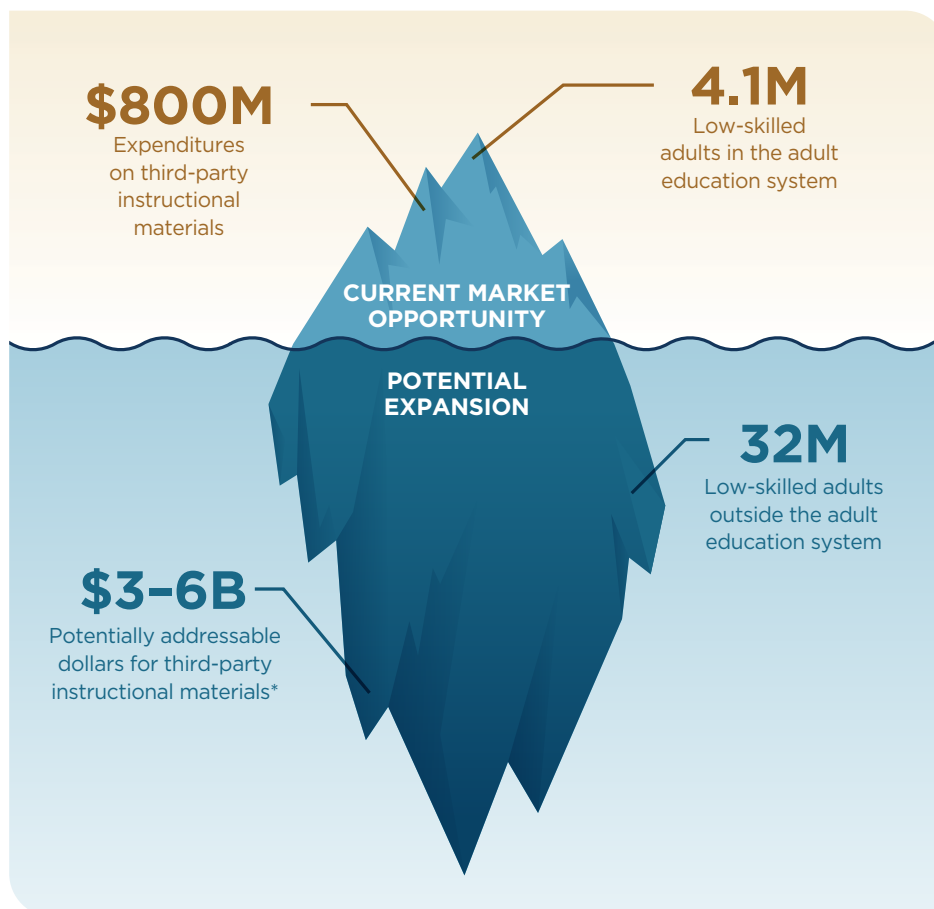
- Although total funding and expenditures in adult education are not projected to grow substantially in the near future, the digital portion of instructional materials spending – i.e., digital's "share of wallet" – should increase significantly in the years to come, at the expense of print-based materials.

- The level of spending captured by digital solutions today likely underrepresents the actual use of technology-based instructional solutions in adult education, given the pervasive nature of free online content used to support instruction.

- Spending on digital instructional materials varies significantly across the field; the 23%–30% range represents an average across all programs. For example, one out of every three survey respondents with budget visibility reported that its programs are almost entirely print-based today, while one in 25 reported that greater than 80% of its instructional purchases are digital.

- The $800 million in annual spending on third-party instructional materials includes both core and supplemental instructional programs and resources but does not include categories such as assessment or professional development. These categories represent additional addressable dollars in the system.

These factors reflect the adult education instructional materials market as it is configured today. However, for suppliers, investors and funders, policy makers, and other stakeholders, there exists a substantially larger market need that should be considered.

EXPANDING THE MARKET – REACHING THOSE NOT SERVED TODAY

Analysis of the total addressable market in adult education includes not only the 4.1 million adults currently enrolled in programs but also the 32 million low-skilled adults who are not receiving, and may not have access to, basic skills education programs and services. These 32 million adults represent a potential expansion of the current market opportunity, similar to the way in which online postsecondary education models expanded access to students – and the overall number of participants – who could not enroll in traditional, site-based programs.

THE TOTAL ADDRESSABLE MARKET IN ADULT EDUCATION

$800M
Expenditures on third-party instructional materials

4.1M
Low-skilled adults in the adult education system

CURRENT MARKET OPPORTUNITY

POTENTIAL EXPANSION

32M
Low-skilled adults outside the adult education system

$3–6B
Potentially addressable dollars for third-party instructional materials*

* Estimated using current levels of per-student spending on instructional materials for the 4.1 million adults in the adult education system.

There are any number of creative ways to reach and serve these 32 million adults through an expansion of the institutional adult education system itself, by way of adjacent employer or consumer channels, or via alternative approaches. In particular, the strong – and increasing – prevalence of smartphone ownership among this population creates a potential channel that a handful of entrepreneurial organizations are already pursuing.[2] While serving this adult learning community with technology-based models presents challenges, suppliers, entrepreneurs, and funders should think creatively about new delivery models to provide educational access to this large base of adults with fundamental educational needs.

2. Appendix C highlights selected suppliers reviewed by Tyton Partners. Notable suppliers with "mobile-first" strategies include Cell-Ed and Skylab Learning.

THE ADULT EDUCATION SOLUTION LANDSCAPE AND OPPORTUNITIES FOR INNOVATION

The opportunities for new entrants in the adult education market are in some measure informed by the existing competitive landscape. While the K–12 and postsecondary markets are teeming with entrepreneurial and established providers that compete aggressively for every investment dollar and institutional customer, far fewer suppliers are focusing on the adult education space. Moreover, unlike the K–12 and postsecondary markets, where significant market concentration exists among the largest publishers, the adult education market is relatively fragmented, and no single provider possesses a controlling share of the market. This dynamic bodes well for new entrants and those seeking to displace existing providers.

Tyton Partners conducted a scan of the adult education supplier ecosystem to augment its conversations and survey outreach to program directors and instructors. The supply-side analysis identified and catalogued approximately 230 products[3] from more than 150 suppliers[4] supporting adult education programs. This represents a rather small supplier ecosystem when one considers that thousands of companies develop technology-based products and services specifically targeting the needs of K–12 and postsecondary teaching and learning environments.

Our analysis of adult-education-oriented products offers market insights that frame deficiencies and openings for suppliers in the adult education market. To assist suppliers and entrepreneurs, the following sections highlight four core issues: target market orientation, solution modality, delivery platform, and business model.

TARGET MARKET ORIENTATION – ARE WE DEVELOPING SOLUTIONS FOR ADULT LEARNERS?

Just over 50% of the products available to adult education programs today are purpose-built for this market[5] – meaning that they are designed specifically to meet the needs and context of adult learners. The balance of the offerings are either designed for students in a more traditional K–12 or postsecondary context or represent other tools not expressly developed for instructional purposes. This latter category includes more consumer-oriented solutions, such as social networks, productivity applications, and other general-content resources that our research indicates are integrated into instructional efforts within adult education programs.

### PRODUCT DISTRIBUTION BY TARGET MARKET ORIENTATION

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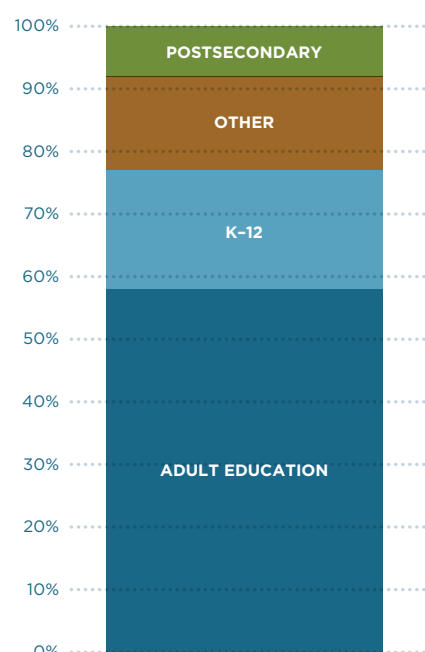
3. Products that maintain multiple editions (e.g., for different grade levels) were treated as one single product for the purposes of our analysis, as they represent individual solutions within the same overarching product suite.
4. Based on our experience researching this market, we believe that the suppliers and products we have identified represent a reasonably comprehensive sample of the adult education supplier ecosystem.
5. This figure and analysis is based on approximately 230 products identified and catalogued by Tyton Partners and referenced in the previous section.

The fact that close to half of the instructional solutions and resources used by adult education programs were developed for other markets is problematic, and it is a dynamic we see in other parts of the education ecosystem, most notably the community college segment. In our experience, this dynamic often leaves customers and end users contending with issues of relevance and efficacy, as these resources have been developed for "other" audiences and contexts. Today, we are witnessing an emergent class of innovative solutions developed specifically to address community college issues and needs; a similar opportunity exists for suppliers in the adult education community, and such solutions are being sought by adult education professionals.

At the same time, adult education administrators and instructors report significant use of and familiarity with tools that are not specifically designed for their programs or learners. In particular, survey respondents highlighted Facebook, Google Docs, YouTube, and Khan Academy (from among the options listed) as the most widely used and most familiar set of instructional resources in their programs.

USAGE VS. FAMILIARITY OF SPECIFIC PRODUCTS
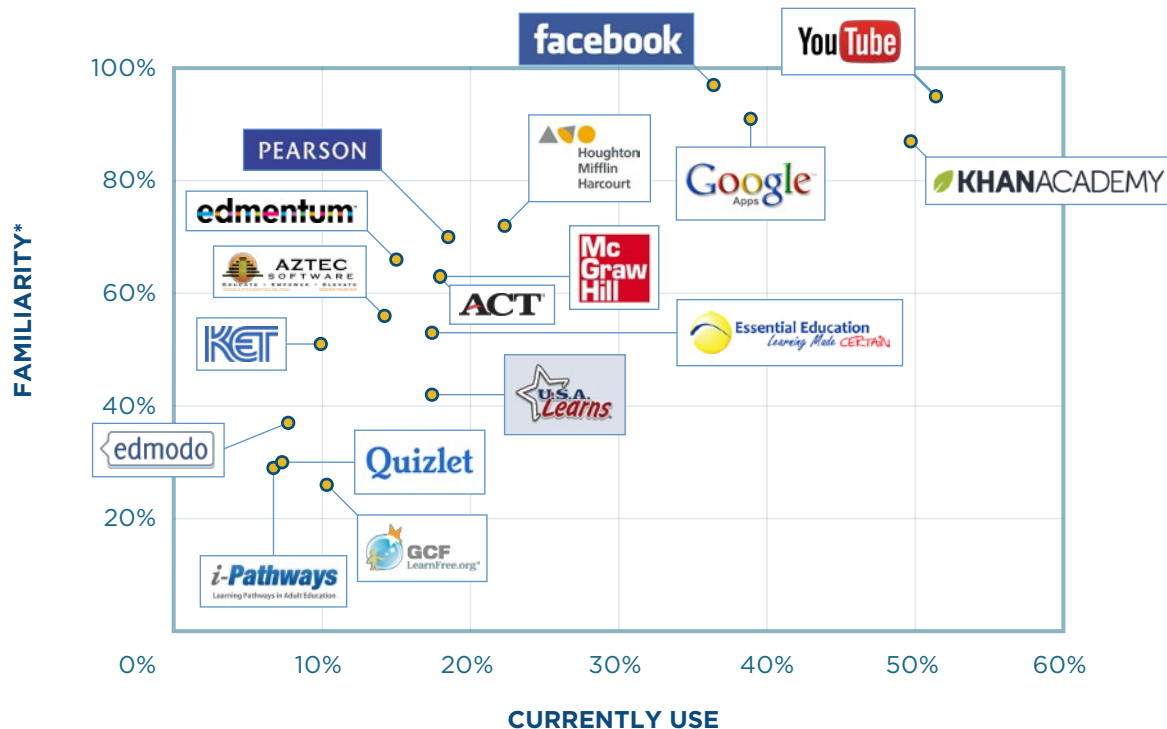
* Familiarity reflects both "Very Familiar" and "Somewhat Familiar" responses.
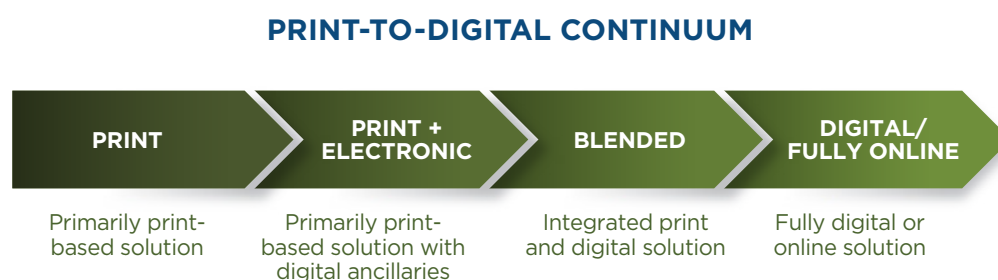
These findings offer several insights to the field. First, and not surprisingly, free or low-cost resources represent a practical solution amid funding constraints within the adult education community. The cost model for new solutions will remain a paramount consideration for suppliers until the demand side of the adult education market matures and creates efficiencies for solution providers.

Second, some of these examples (e.g., Facebook and YouTube) are resources that adult learners may already be using; their familiarity and ubiquity may serve as a comfortable point of departure in exploring technology-based learning models for adults who often lack confidence in their ability to be successful students. Moreover, motivation for learning may be high for students using these types of resources, as these solutions enable them

to interact and engage with family and friends around common experiences. Making these resources relevant for adult learners within an instructional context is right now generally an individual instructor effort; an opportunity for suppliers may lie in ensuring the quality and rigor of those experiences and sharing best practices with stakeholders in the adult education community.

MODALITY – IS IT REALLY A "DIGITAL" SOLUTION?

While most market solutions tout a "digital" component, the product integrity and alignment of those models varies widely. The figure below illustrates a "print to digital" spectrum of solution models, with digital orientation increasing in intensity from left to right.

PRINT-TO-DIGITAL CONTINUUM

PRINT	PRINT + ELECTRONIC	BLENDED	DIGITAL/ FULLY ONLINE
Primarily print-based solution	Primarily print-based solution with digital ancillaries	Integrated print and digital solution	Fully digital or online solution

As noted on page 6, more than 70% of program spending on instructional materials is currently allocated to print-based materials, and large publishers represent the leading suppliers within this category. As these publishers have responded to market pressures and evolved their solutions, the field has witnessed an increasing number of "print + electronic" products that represent an initial shift; however, the reality is that most of these offerings are still print-centric, with the supplemental digital resources nominally integrated into the product architecture.

In the blended and fully digital or online segments, the landscape of products and suppliers becomes more limited and more fragmented in terms of market penetration. Many of the "products" in these segments are not well-designed and pedagogically rigorous instructional solutions, but rather independent online content and aggregated web resources available to instructors. While these tools and portals can be helpful for instructors to leverage and incorporate into lessons, few of these offerings represent evidence-based, instructional programs that follow accepted instructional design principles.

The biggest current gap in the adult education solution environment is a more vibrant, innovative set of blended learning offerings for programs, practitioners, and students. Given prevailing student-to-computer ratios and the frequency with which students have classroom access to computers for instructional activities, blended products or instructional models that integrate targeted technology-based interventions may resonate more strongly with the majority of stakeholders in the field than products that are completely technology-based.[6] Computer-based, fully online programs, while potentially compelling from a convenience and access standpoint, face both technology infrastructure and student behavioral hurdles that will delay broad market adoption in the near term.

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6. See *Part 1: Interest in and Aptitude for Technology*, which presents survey data on adult education students' frequency of access to computers at their program site.

DELIVERY PLATFORM – SHOULD WE PURSUE A MOBILE-FIRST APPROACH?

The adult education market lacks mobile-available solutions to support learners in both in-classroom and out-of-classroom settings. This is a particularly evident opportunity for suppliers and the adult education field when one considers that an estimated 55% to 75% of students in adult education programs own smartphones, a figure that will only increase over time. Moreover, as noted in Part 1 of this series, *Interest in and Aptitude for Technology*, adult education administrators and instructors are highly optimistic about the potential for smartphones to support student learning and engagement.

PRODUCT DISTRIBUTION BY DEVICE AVAILABILITY
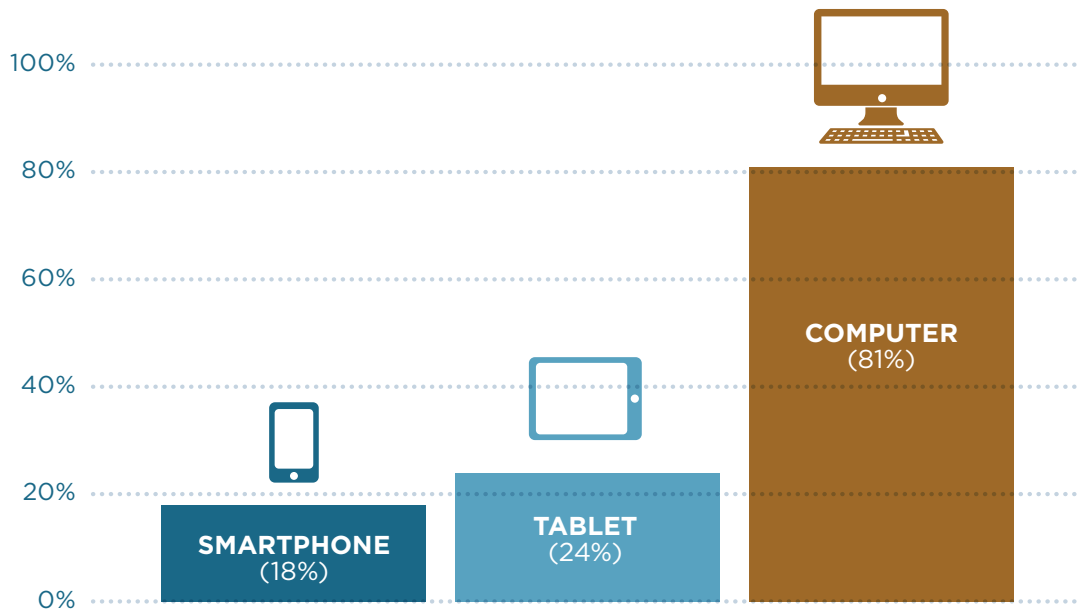
This analysis is derived from Tyton Partners' review of more than 230 adult education-oriented solutions evaluated between November 2014 and March 2015.

While nearly 20% of adult education instructional solutions have a smartphone version available, few of these solutions are actually designed with a mobile-first strategy. The majority of these solutions have been developed for desktop or laptop delivery, with later development and release of an iOS or Android version. This disconnected design effort often leads to a less effective mobile environment, a dynamic that the adult education community can ill afford, given the inherent challenges in engaging and supporting adult students.

> *"It would be great if there were more app products, not just the 'online version' of a product."*

Of all programs and channels within the adult education community, ESL programs benefit from the greatest number of available mobile options. Far fewer solutions appear to be targeting skill building in the areas of literacy or numeracy in ways that are contextually relevant for adult learners, in contrast to myriad applications (purchased by parents and selected school buyers) that focus explicitly on these areas for young children.

While adult education stakeholders are bullish on mobile solutions, they caution suppliers to address a core set of baseline requirements in pursuing mobile models:

- Ensure simple and intuitive design for students; complex and/or hard-to-understand solutions can exacerbate barriers for adult learners

- Develop scaffolding and support for students and instructors; accommodate the professional development needs of instructors; and ensure the relevance and value of activities for students

- Be mindful of adult learners' time – they do not have much of it to devote to learning activities

- Design financing and service models for mobile solutions that are sensitive to the limited financial resources of many adult learners and their variability in wireless plans and access to the Internet outside of classroom settings

Ultimately, engaging with the adult education community to design solutions that meet instructors' and students' needs requires suppliers to invest in core product development.

BUSINESS MODEL – MATCHING SOLUTION COSTS WITH MARKET CONTEXT

Of the solutions evaluated in the adult education ecosystem, more than 75% employ fee-based models requiring the purchase of print-based or digital materials and resources. While many of the offerings are sold on a one-time, per-student basis, suppliers do show signs of pursuing the increasingly prevalent annual subscription or license fee model, wherein programs must re-up their financial commitment each year. The "cost" of instructional materials for adult programs and students is not as actively debated as costs for materials in the traditional postsecondary arena. However, there are limitations on pricing for solutions serving adult learners in public-sector environments (e.g., public K–12 and postsecondary institutions, community-based organizations, public libraries), given the current total spend (~$800 million) relative to the size of the student population (4.1 million).

In assessing technology-based solution use and perceived importance among program directors and instructors in our survey, then, it is not surprising that respondents cited free online content resources and productivity software as both the most widely used and the most important types of instructional resources (see figure on the next page).

USAGE VS. IMPORTANCE OF TECHNOLOGY-BASED INSTRUCTIONAL RESOURCES
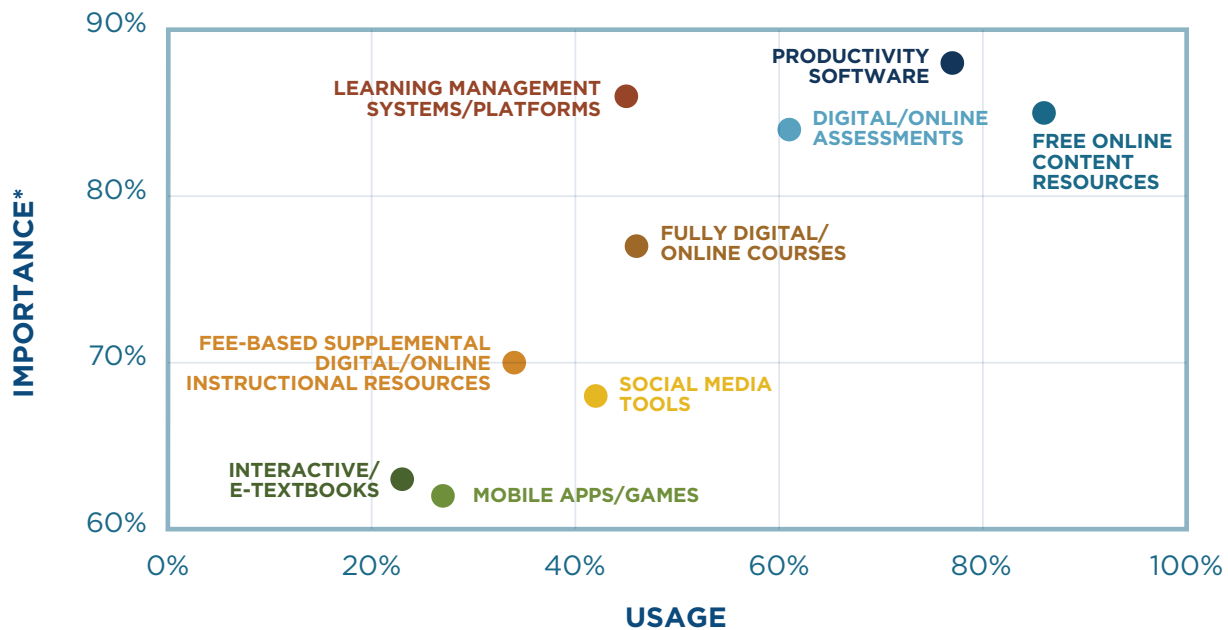
* Importance reflects both "Very Important" and "Important" responses.

Pairing the above data with the more company-specific findings presented in the chart on page 9 suggests that entrepreneurs and established providers targeting public-sector programs may need to investigate business models and approaches where selected product and service elements are unbundled from initially free or low-cost tools and resources.

Gaining access to non-program funding sources is another avenue for suppliers and programs to consider. Foundations and companies – often through corporate social responsibility efforts – are pursuing strategies to underwrite local, regional, and national initiatives to support adult education programs. These efforts fund and encourage sustainable, innovative models that enhance the community as a whole and aid selected programmatic efforts. For suppliers and entrepreneurs, these groups can represent alternative funding streams – or "buyers" – to enable the adoption and implementation of solutions and resources that programs might not otherwise be able to afford. Therefore, opportunities exist for suppliers to explore and develop business models that incorporate third-party funding strategies to sponsor adult education program investments.

PROMOTING MARKET EXPANSION AND EFFICIENCY

The adult education community should strive to pair its interest in a richer set of technology-based instructional solutions for adult learners with improvements in three areas that can promote market expansion and efficiency for suppliers. Focused efforts by adult education stakeholders to address channel complexity and fragmentation, buyer decision-making processes, and program funding dynamics can encourage supply-side innovation and adoption of technology-based resources by programs.

CHALLENGES IN THE ADULT EDUCATION MARKET

CHANNEL COMPLEXITY AND FRAGMENTATION

BUYER DECISION-MAKING PROCESSES

MANY DIVERSE CUSTOMERS

LIMITED BUYER AWARENESS

CONSTRAINED RESOURCES

$$

PROGRAM FUNDING DYNAMICS
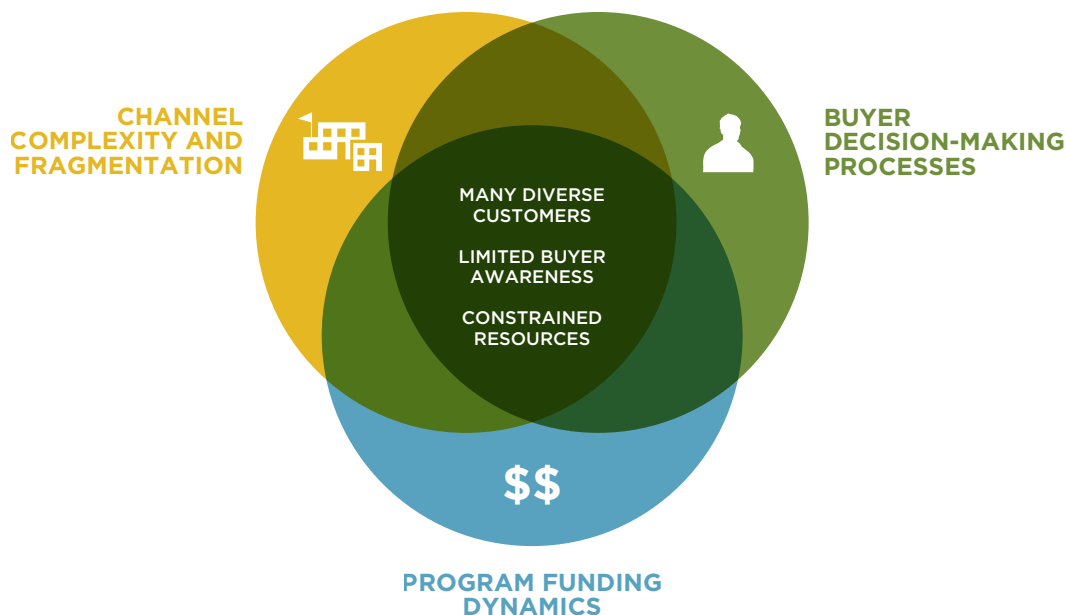
Additional perspective on each of these areas is captured below.

MAKING SENSE OF THE CHANNELS

With tens of thousands of potential individual customer sites, helping adult education suppliers achieve some degree of scaled access to customers and distribution is paramount.

ILLUSTRATIVE DISTRIBUTION OF CUSTOMER SITES IN ADULT EDUCATION

PUBLIC LIBRARY SYSTEMS
~8,900 SITES

COMMUNITY-BASED ORGANIZATIONS
~400 SITES*

~4,500 SITES **CORRECTIONAL INSTITUTIONS**

ADULT EDUCATION SITES

COMMUNITY COLLEGES
~1,100 SITES

~2,500 SITES **AMERICAN JOB CENTERS**

~1,300 SITES **K–12 DISTRICTS/LOCAL EDUCATION AGENCIES**
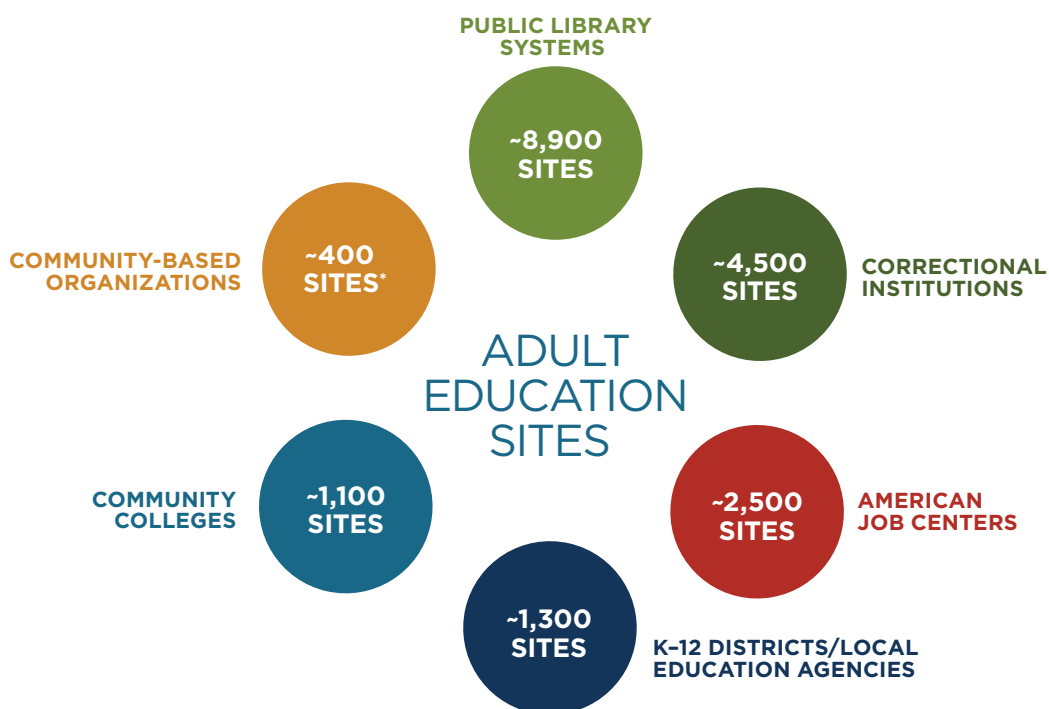
* Data for Community-Based Organizations represents the number of sites receiving WIOA Title II funding; there are thousands of other CBOs providing adult education services without Title II federal funding.

Building a direct sales force to reach any customers but the largest ones across these channels is unrealistic for most companies and organizations. To address this, states and communities with large numbers of adult education programs have an opportunity to identify approaches to aggregating customer demand and combining the purchasing power of multiple programs and decision makers in order to enhance suppliers' access to more consolidated, scaled sets of prospective customers.

> *"Adult education has monstrous need. However, the market fragmentation is a risk for suppliers and is limiting a more innovative solution set."*

Cooperative purchasing models represent one example of how fragmentation might be reduced, bringing together larger pools of customers – and their financial resources – to improve programs' purchasing power and to establish broader shared support and implementation mechanisms for technology-based instructional models. Co-op models are well established in the K–12 environment, as well as in numerous state and federal government sectors. State, community, and program leaders in adult education should be evaluating these models and exploring ones that may meet the needs of the adult education community.

Co-op models can also assist suppliers in accommodating the diversity of adult learners within the system. While most programs are similarly focused on building basic skills for underprepared adults, they often balance different needs and goals based on the students they serve; student demographic variability – across socioeconomic status, employment status, English proficiency, age, and educational attainment – equates to distinctive program orientations and instructional approaches.

> *"Serving someone with below an 8th-grade proficiency level is totally different than serving someone with 9th- to 12th-grade skills. Similarly, products that work for ASE [adult secondary education] students may not work for ESL students, who have difficulty with language proficiency."*

A co-op model that brings together a critical mass of programs can help to mitigate this variability by creating attractive pockets of demand for solutions that target specific learner needs and technology environments. When that co-op model is replicated across multiple large urban communities or states, a more efficient and addressable market emerges for entrepreneurs and companies. Ultimately, co-op models allow suppliers to concentrate their limited sales resources on a set of more scaled and attractive customer opportunities, and create incentives for suppliers participating in the market.

ENHANCING SOLUTION TRANSPARENCY AND CUSTOMER DECISION MAKING

Nearly 70% of adult education program directors and instructors rely on referrals from peers and conference attendance to identify instructional resources, far outpacing all other sources.

SOURCES USED TO LEARN ABOUT COMMERCIAL INSTRUCTIONAL RESOURCES IN ADULT EDUCATION

Source	Percentage
TALKING TO COLLEAGUES/PEERS	68%
CONFERENCE ATTENDANCE	68%
STATE-LEVEL ADULT EDUCATION COMMUNICATIONS	45%
INTERNET SEARCHES	27%
ADULT ED JOURNALS AND RESEARCH PUBLICATIONS	22%
EMAIL DISCUSSION LISTS AND COMMUNITIES OF PRACTICE	19%
EMAILS FROM COMPANIES AND ORGANIZATIONS	16%
VENDOR SALES PITCHES	9%
DIRECT MAIL FROM COMPANIES AND ORGANIZATIONS	8%
COMPANY WEBSITES	7%
ONLINE MAGAZINES OR BLOGS	4%
OTHER	2%

Recommendations from colleagues are a hallmark of solution discovery and purchasing practices in the K–12 environment as well. Reliance on this approach, however, generally limits buyers' awareness of the broader universe of options and may not connect buyers with solutions that best match the needs of their students. In order to accelerate the adoption and integration of technology-based instructional models, the adult education market must complement the push for innovation on the supply side with more pull from the demand side. As a first step, the adult education community's effort to catalogue available solutions establishes an inventory of options to assist program administrators and instructors with decision making. Ultimately, these inventories should also include richer data and insights regarding solutions' use cases and efficacy across different types of programs.

In appendices B and C, we have aggregated an initial set of notable companies active in the space, as well as more specific products and services made available by these suppliers. These are not comprehensive lists, but they do reflect a thorough scan of the market for instructional adult education solutions. Ultimately, this type of effort should be led by a respected, independent body that can curate and tag products across the market to enhance discoverability and establish a set of resources that offer valuable support for community decision-makers.

One example of such an inventory is the **Commission on Adult Basic Education**'s recently created Adult Educator Resources repository, which holds lesson plans, videos, apps, conference presentations, and other resources for adult education instructors. The US Department of Education's Office of Career, Technical and Adult Education has established **LINCS**, which offers a resource collection, professional development communities, and online, self-paced courses. Another example is **EdSurge's Adult Basic Education** section within its Edtech Index, a database of educational technology products. A handful of states have also created repositories of resources for their adult educators. This general trend toward curating resources may be particularly important given the previously noted adoption and use of free online resources; already, an emergent class of businesses seeking to curate open educational resources has emerged and could become valuable services for adult education programs.

These and other resources developed by various organizations represent nascent efforts to strengthen adult education customers' product knowledge base. Suppliers also benefit from these efforts by securing greater visibility and awareness for their products among decision makers than they might be able to achieve through their own efforts. The next logical step is a more robust set of decision support tools that can enhance program directors' and instructors' ability to evaluate and assess the applicability, fit, and prospective impact of the solutions and resources available.

EXPANDING THE POOL OF AVAILABLE FUNDING

Funding is an ever-present hurdle for the adult education community. Program administrators and instructors cite funding as the most significant issue hindering learning technology adoption in their programs. One of the bright spots for suppliers, as noted earlier, is that digital instructional materials will continue to expand their share of adult education's overall spending on third-party resources.

In the absence of significant new resource allocations to adult education at the state and federal levels, other options should be considered to enhance the funding environment for programs and their procurement of technology-based instructional resources. First, even without an expansion of available dollars, the cooperative purchasing model highlighted above should increase the value of the financial resources already in the system; aggregated purchasing initiatives can benefit both programs and suppliers by improving market efficiency. Additional strategies for expanding the pool of funding for adult education programs and innovative learning technologies include corporate social responsibility initiatives, philanthropic programs and organizations, and market pull mechanisms.

Corporate social responsibility initiatives. Corporate social responsibility (CSR) initiatives draw upon organizations' desire to address social welfare issues. While a number of companies and organizations are already active with CSR initiatives in adult education, there is likely an opportunity to engage additional participants. For example, given survey respondents' high use of and high importance assessments of tools from companies like Google and Facebook, the adult education field could identify strategies to engage these companies more directly in supporting the field. For these high-profile corporations, identifying CSR initiatives that support adult education programs through a combination of solutions and services, market awareness activities, and policy efforts could create huge momentum and impact in the community.

Philanthropic programs. Another approach lies in encouraging corporate philanthropic programs and independent philanthropic organizations to direct funding or investments toward adult education initiatives. In this case, private-sector organizations invest dollars in the adult education system to fund various efforts, such as increasing the use of learning technologies or expanding the capacity of the system or an aspect of the system (e.g., instructional programs, number of certified instructors, available slots for students). Two prominent examples of this are the *Dollar General Literacy Foundation*, which makes millions of dollars in grants annually to non-profits that provide direct services to adults in need of literacy assistance, and the Goodwill Community Foundation, which developed *GCFLearnFree.org* to provide lessons, videos, and other interactive resources to adults to strengthen their career and life skills.

Market pull mechanisms. Market pull mechanisms are tools to incentivize investment or innovation in underserved or under-resourced communities and sectors. These mechanisms can be initiated by, and can involve, any number of organizations and companies. Examples of pull mechanisms that could be used to drive demand or efficiency in the adult education community include:

- Encouraging adult education programs to aggregate their purchasing power

- Creating prizes that incentivize suppliers and entrepreneurs to build new solutions or explore innovative business models

- Launching social impact bonds as an alternative form of financing that delivers a return to investors for specific programmatic or student outcomes

The strategies detailed above represent important opportunities for supporting the adult education field while spurring innovation in the supplier ecosystem. In particular, suppliers and entrepreneurs should be aware of corporate social responsibility programs and market pull mechanisms and models, which are already being employed in pockets throughout the country to increase funding beyond those dollars available in the traditional system.

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By addressing channel fragmentation and diversity, enhancing the knowledge and awareness of buyers, and improving funding dynamics, adult education stakeholders should begin to mitigate some of the historical, systemic factors hindering more aggressive consideration of and investment in adult education solutions by suppliers.

LOOKING TO THE FUTURE

Learning for Life: The Opportunity for Technology to Transform Adult Education highlights an adult education community at an inflection point. On the demand side, from program directors and instructors, we see a community increasingly desirous of and in pursuit of more dynamic, technology-based teaching and learning resources. These front-line professionals perceive the potential benefits that thoughtfully designed and implemented learning technologies can bring to their students, while remaining cognizant of the issues that must be managed, given the dynamics of this often vulnerable set of adult learners.

On the other hand, analysis of the supplier ecosystem reveals an immature market that does not currently offer adult education stakeholders a vibrant set of innovative learning technologies designed specifically for their students. Given the richness and abundance of technologies across our daily lives and, equally important, the way in which technology is changing the nature of work across all areas of our economy, the paucity of solutions is problematic, if not troubling.

However, suppliers need assistance in developing more rational and attractive market dynamics to encourage investment. The adult education community's commitment to addressing a trio of structural market conditions – challenging channel dynamics, insufficient decision-making resources, and funding constraints – will help define how and to what extent the desired investment in innovation occurs.

This is not to suggest that innovative efforts by forward-looking program leaders and instructors, as well as by entrepreneurial suppliers, are not taking root. They are, and they represent exciting initiatives that are being elevated as beacons for adult education stakeholders to see and investigate more broadly. The hope is that based on the various recommendations highlighted across this series, the adult education community can accelerate the mass and velocity of these efforts, much as we have seen occur across the K–12 and postsecondary sectors during the past decade.

Tens of thousands of adult education professionals and volunteers work tirelessly to help address the challenges facing more than 36 million adults unprepared for roles in today's workforce. *Learning for Life: The Opportunity for Technology to Transform Adult Education* represents a call to lift up their work and efforts by enhancing some of the tools and resources to which they – and their students – have access.

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Learning for Life: The Opportunity for Technology to Transform Adult Education, a two-part series supported by the Joyce Foundation and the Commission on Adult Basic Education, establishes a baseline view of the current role and potential for learning technologies within the adult education community. Inaugural efforts such as these often raise as many questions as they answer, yet they serve as a necessary foundation from which to explore opportunities and issues in greater detail. Ultimately, a longitudinal analysis of the topics covered across these two issue briefs will help establish an increasingly definitive point of view on learning technologies' level of use and their impact on adult education students and programs. We look forward to working with our current partners and other community stakeholders to build on and extend this work in the coming year.

Efforts to synthesize a snapshot of the state of an education sector are always enhanced through refinement and iteration from interested stakeholders. We appreciate the thoughtful feedback and recommendations shared by adult education community participants as we have conducted and presented this work, and we look forward to integrating their insights and observations into future efforts. Moreover, we encourage readers to share these publications with their adult education colleagues to engage new voices and push conversations based on this work into places where discussions may not yet be happening.

APPENDIX A:
RESEARCH OVERVIEW AND METHODOLOGY

This issue brief and *Part I: Interest in and Aptitude for Technology* draw on research and analysis conducted by Tyton Partners during 2014 and 2015.

Survey data presented in the two issue briefs was generated from Tyton Partners' national adult education survey conducted during fall 2014. Invitations to an online survey were extended to more than 13,000 individuals in late October 2014, and the survey remained open through early November 2014. A total of 1,057 survey questionnaires were completed, resulting in a yield of 8%. Given the diversity of the adult education field, we sought to reach individuals across the various programs and channels actively supporting adult learners. Survey invitations were extended to prospective respondents sourced through proprietary Tyton Partners lists, through lists purchased from third-party market research vendors, and through our survey partner, the Commission on Adult Basic Education. More detail about the survey lists and survey respondents can be accessed in the appendix of *Part I: Interest in and Aptitude for Technology.*

During 2014 and 2015, Tyton Partners conducted an extensive supply-side scan to identify suppliers and products within the adult education ecosystem. A number of primary and secondary research activities supported the identification of products and suppliers for the database, including but not limited to:

- Proprietary Tyton Partners supplier market maps

- Exhibitor and sponsor lists from local, state, and national conference websites

- Interviews with adult education experts and other industry stakeholders

- Data from Tyton Partners' survey of adult education administrators and instructors

- Online repositories and lists of educational resources

- General Internet searches

Ultimately, we developed a database of approximately 150 suppliers delivering products and services used in adult education environments. Appendices B and C highlight a subset of these suppliers and their offerings.

APPENDIX B:
SUPPLIERS IN THE ADULT EDUCATION ECOSYSTEM

The table below highlights approximately 150 suppliers that deliver products and services adopted by adult education programs. This list includes a diversity of organizations, including large publishers and small start-ups, for-profit and non-profit organizations, and organizations serving adult students through various channels. While the list is not exhaustive, it does represent a reasonably comprehensive view of the ecosystem of current adult education learning providers.

COMPANY	WEBSITE
Acellus	www.acellus.com
ACEware Systems	www.aceware.com
Achieve3000	www.achieve3000.com
ACT	www.act.org
ALISON	www.alison.com
ALTEC	www.altec.org
Apex Learning	www.apexlearning.com
Augusoft	www.augusoft.net
Aztec Software	www.aztecsoftware.com
Barron's Educational Series	www.barronseduc.com
BEM Publishers	www.bempublishers.webs.com
Bilingual Books	www.bbks.com
Blackboard	www.blackboard.com
BrainPOP	www.brainpop.com
Broderbund	www.broderbund.com/c-33-mavis-beacon.aspx
BurlingtonEnglish	www.burlingtonenglish.com
Cambridge University Press	www.cambridge.org
Career Cruising	www.public.careercruising.com/en
Career Solutions Publishing	www.careersolutionsgroup.com
CASAS	www.casas.org
Castle Software	www.preppath.com
Cell-Ed	www.celled.org
Cengage Learning	www.cengage.com/us
Cengage Learning Higher Education	www.cengage.com/search/showresults.do?N=16
Center for Applied Linguistics	www.cal.org
Centro Latino for Literacy	www.centrolatinoliteracy.org
CEV Multimedia	www.cevmultimedia.com
Cingletree Learning	www.cingletree.com

COMPANY	WEBSITE
ClassMarker	www.classmarker.com
College Board	www.collegeboard.org
ComFit Learning	www.comfit.com
Condensed Curriculum International	www.condensedcurriculum.com
Connecticut Adult Virtual High School	www.ctvhs.org
CSM	www.csmlearn.com
Curriculum Publications Clearinghouse	www.wiu.edu/CPC
D2L	www.d2l.com
Data Recognition Corporation / CTB	www.ctb.com/ctb.com/control/main
Desmos	www.desmos.com
Edgenuity	www.edgenuity.com
Edmentum	www.edmentum.com
Edmodo	www.edmodo.com
EdOptions	www.edoptions.com
Educator.com	www.educator.com
Educo	www.educosoft.com
Encomium Publications	www.encomium.com
English on a Roll	www.englishonaroll.com
English Talk Shop	www.englishtalkshop.com
EnglishCentral	www.englishcentral.com/videos
EnglishCourseVideo.com	www.englishcoursevideo.com
EnglishForEveryone	www.englishforeveryone.org
esl-lounge	www.esl-lounge.com
Essential Education	www.essentialeducation.com
ETS	www.ets.org
EverFi	www.everfi.com
Facebook	www.facebook.com
Flickr	www.flickr.com
Float Your Boat Media	www.floatyourboatmedia.com
Formstack	www.formstack.com
GCFLearnFree.org	www.gcflearnfree.org
GED Testing Service	www.gedtestingservice.com/ged-testing-service
GeoGebra	www.geogebra.org
GMetrix	www.gmetrix.com
Goodheart-Willcox Publisher	www.g-w.com
GoodTyping	www.goodtyping.com

COMPANY	WEBSITE
Grammar Bytes!	www.chompchomp.com
Grass Roots Press	www.grassrootsbooks.net/us
Hawkes Learning	www.hawkeslearning.com
Houghton Mifflin Harcourt	www.hmhco.com
i-Pathways	www.i-pathways.org
i>clicker	www1.iclicker.com
Inspiration Software	www.inspiration.com
Instructure	www.instructure.com
intoCareers	www.intocareers.org
IXL	www.ixl.com
JER Online	www.jeronline.com
Jossey-Bass	www.wiley.com/WileyCDA/Section/id-811982.html
KET - Kentucky Educational Television	www.ketadultlearning.org
Khan Academy	www.khanacademy.org
KNEXT	www.knext.com
Kratos Learning Solutions	www.kratoslearning.com
Kurzweil Education	www.kurzweiledu.com
Kuta Software	www.kutasoftware.com
Labyrinth Learning	www.lablearning.com
Learner Web	www.learnerweb.org/infosite
Learning Chocolate	www.learningchocolate.com
LINCS	www.lincs.ed.gov
LinkedIn	www.linkedin.com
Literacy Mid-South	www.literacymidsouth.org
Livemocha	www.livemocha.com
Macmillan Education	www.onestopenglish.com
Mango Languages	www.mangolanguages.com
ManyThings.org	www.manythings.org
Math Facts Pro	www.mathfactspro.com
Math Is Fun	www.mathsisfun.com
Math-Drills.com	www.math-drills.com
McGraw-Hill Education	www.aleks.com
Melior	www.todaysclass.com
Moodle	www.moodle.org
Multi-Cultural Educational Services	www.mcedservices.com
New Readers Press	www.newreaderspress.com

COMPANY	WEBSITE
News in Plain English	www.thetimesinplainenglish.com
Newsela	www.newsela.com
Northstar Digital Literacy Project	www.digitalliteracyassessment.org
Odysseyware	www.odysseyware.com
Pace Learning Systems	www.pacelearning.com
Paxen Learning Services	www.paxen.com
Paxton/Patterson	www.paxtonpatterson.com
Pearson	www.pearsonschool.com
Prezi	www.prezi.com
Pumarosa	www.pumarosa.com/ingles/information/about_eng.htm
Quia	www.quia.com
QuickSchools	www.quickschools.com
Quizlet	www.quizlet.com
Read Naturally	www.readnaturally.com
Read Theory	www.readtheory.org
Reading Horizons	www.readinghorizons.com
Rosetta Stone	www.rosettastone.com
School Improvement Network	www.schoolimprovement.com
SchoolCity	www.schoolcity.com
Schoology	www.schoology.com
Skylab Learning	www.skylablearning.com
Smrt	www.smrtenglish.com/smrt
Softschools.com	www.softschools.com
Strivven Media	www.virtualjobshadow.com
Student Achievement Partners	www.achievethecore.org
Sumdog	www.sumdog.com
TapDance Live!	www.tapdancelive.com
TeacherTube	www.teachertube.com
Teaching.com	www.typing.com
TED	www.ted.com
Teknimedia	www.teknimedia.com
ThatQuiz	www.thatquiz.org
The Math Worksheet Site	www.themathworksheetsite.com
The NROC Project	www.edready.org
The TLP Group	www.powerpath.com/system.html
Think60	www.think60.net

COMPANY	WEBSITE
Townsend Press	*www.townsendpress.com*
USA Learns	*www.usalearns.org*
Vimeo	*www.vimeo.com*
Vocabulary.com	*www.vocabulary.com*
VoiceThread	*www.voicethread.com*
Weebly	*www.weebly.com*
West Virginia Adult Basic Education	*www.livebinders.com/play/play?id=411993*
Wonderlic	*www.wonderlic.com*
WordPress.com	*www.wordpress.com*
World Education	*www.worlded.org*
Xenegrade	*www.xenegrade.com*
XMind	*www.xmind.net*
YouTube	*www.youtube.com*

APPENDIX C:
SELECTED PRODUCTS USED BY ADULT EDUCATION PROGRAMS

The table below highlights selected products and services that are in use by adult education programs for their students. This list includes a range of offerings, including instructional programs, assessments, productivity software, social media tools, and online content resources.

COMPANY	PRODUCT	PRODUCT OVERVIEW
ACT	*KeyTrain*	Interactive foundational career readiness program that aligns to WorkKeys assessments
ALISON	*Online Courses*	Free online diploma and certificate courses in various subjects, including digital literacy, personal development, and languages
ALTEC	*QuizStar*	Free online service that allows teachers to make their own educational quizzes
AmEnglish.com	*Pronunciation in English*	Interactive online program focusing on pronunciation for English language learners
Apex Learning	*Apex Learning*	Core-subject courses that can be completed for middle-school or high-school credit or used for supplemental learning objectives
Association of Classroom Teacher Testers	*BESTEL*	Placement test for high-school, postsecondary, and adult English language learners
Aztec Software	*Foundations Series*	Software that assesses skills and delivers personalized remediation of low-level basic skills
Aztec Software	*Bridge Series*	Software that assesses skills and delivers personalized remediation of higher-level basic skills
Aztec Software	*GED Preparation Series*	Materials include GED practice tests and lessons with individualized remediation capabilities
Aztec Software	*TASC Test Preparation Series*	Materials include TASC practice tests and lessons with individualized remediation capabilities
Aztec Software	*Work Ready*	Interactive modules and lessons for soft skills in the workplace
Broderbund	*Mavis Beacon Teaches Typing*	Typing software program with exercises and instructional videos
BurlingtonEnglish	*English Courses*	Blended English courses with data analytics that allow for personalized lessons
BurlingtonEnglish	*English/Career Courses*	Blended career-focused English courses with data analytics that allow for personalized lessons
Cambridge University Press	*Ventures*	ESL course kit with CD-ROMs and print instructional materials such as student workbooks and civic worksheets
Career Cruising	*Career Cruising for Workforce Development*	Career development software that assess the user's interests, recommends career paths, and provides career profiles and video content to teach the user about selected career paths
CASAS	*Basic skills and literacy assessments*	Assessments of basic literacy, math, workplace, and life skills
Cell-Ed	*Cell-Ed*	Program that uses standard cell phone text messaging to deliver adult basic education instruction in small increments
Cengage Learning	*Books on vocational trades*	Wide range of recent (2013 or later) textbooks on occupational trades

COMPANY	PRODUCT	PRODUCT OVERVIEW
Cengage Learning	ed2go	Online continuing education courses delivered through a network of 2,100+ colleges and universities
Cengage Learning	World Class: Expanding English Fluency	English language learning program for high-intermediate and advanced learners that uses National Geographic content and focuses on writing and fluency
Cengage Learning Higher Education	Books on career education	Wide range of textbooks on career exploration and education, with digital supplements
Centro Latino for Literacy	Leamos	Online literacy course for pre-ESL students that teaches non-literate Spanish-speaking adults to read and write
CSM	CSM Course	Online adaptive course that develops core math and literacy skills and ties these skills to real-world problem solving
Data Recognition Corporation / CTB	TASC Test Assessing Secondary Completion	High school equivalency exam that is aligned to Common Core State Standards
Data Recognition Corporation / CTB	TABE (Tests of Adult Basic Education)	Suite of basic skills assessments for adult basic education; available in print, online, and adaptive delivery models
Edgenuity	Pathways	Career and technical education online courses designed for high-school students
Edmentum	Edmentum Assessments	Adaptive, personalized online assessment software
Edmentum	Northstar Workforce Readiness	Workforce readiness courseware that helps students train for allied health professions, the GED exam, and Praxis tests
Edmentum	Plato Courseware	Interactive multimedia online courses for secondary, postsecondary, and career and technical education students
Educator.com	Basic Math Online Course	Online video lecture in basic math for students at the 5th- and 6th-grade levels; lectures in other subjects also available
Essential Education	Various career DVDs	DVDs that facilitate career exploration of specific jobs and industries
ETS	TOEFL test	Widely accepted English language assessment
ETS	TOEFL test prep	Blended study materials for the TOEFL exam, featuring books, online courses, practice tests, and CD-ROMs
EverFi	EverFi@Work	Financial literacy program for adults
Grammar Bytes!	Grammar Bytes!	MOOC with downloadable worksheets and interactive exercises for English grammar
Hawkes Learning	Math courseware	Courseware for basic math, developmental math, and math foundations
Houghton Mifflin Harcourt	Career Pathways / Steck-Vaughn GED prep	Portfolio of programs for career exploration and planning, college readiness assessments, GED prep, and work readiness skills development
i-Pathways	i-Pathways	Instructor-facilitated courseware for high school equivalency exam preparation
intoCareers	CIS Junior / CIS High School / CIS Workforce & Agency	Career development programs that facilitate career exploration and planning
IXL	IXL	Courseware with assessments, instruction, and practice that is built on an adaptive, personalized platform
KET - Kentucky Educational Television	Crossroads Café / Culture Clips	26-part ESL storytelling series with supporting print materials
Khan Academy	Online courses	Personalized, free, online practice exercises and instructional videos

COMPANY	PRODUCT	PRODUCT OVERVIEW
Kuta Software	*Kuta Software*	Online service allowing teachers to make their own math tests and worksheets
Learner Web	*Learner Web*	Online service providing adult learners with open educational resources to accomplish personalized goals
Learning Chocolate	*Learning Chocolate*	English language learning exercises that use pictures, sounds, and games
LinkedIn	*LinkedIn*	Social media site for professional networking
Math-Drills.com	*Math drills*	Free math worksheets for K–12 students
McGraw-Hill Education	*ITTS - Instruction Targeted for TABE Success*	Instructional, assessment, and prescription software for TABE preparation
McGraw-Hill Education	*ALEKS*	Courseware that uses adaptive technology to personalize instruction
New Readers Press	*News for You*	Print or online news publication written at a 3rd- to 6th-grade reading level
New Readers Press	*Adult education books and workbooks*	Books and workbooks for improving reading, writing, spelling, and grammar, as well as workplace communication skills
News in Plain English	*The Times in Plain English*	Online news publication written for an audience of basic readers
Northstar Digital Literacy Project	*Northstar Assessments*	Free online assessment of digital literacy; those who pass are awarded the Northstar Digital Literacy Certificate
Odysseyware	*High School Equivalency College & Career Readiness*	Courseware for GED and TASC prep, career and technical education, and core subjects that uses prescriptive technology to personalize instruction
Pearson	*MyFoundationsLab*	Courseware with assessments, instruction, and practice that is built on an adaptive, personalized platform
Quizlet	*Quizlet*	Online provider of flashcards, tests, and study games
Read Theory	*Read Theory*	Adaptive program that offers 1,000 interactive reading assessments for all levels of readers, with reporting abilities for teachers
Reading Horizons	*Adult Literacy Instruction*	Adult literacy software and direct-instruction materials
Rosetta Stone	*Learn English*	Interactive, digital English language learning program with supplemental mobile application
Skylab Learning	*Test Flight / Launch Sequence / Orbital Challenge / Advanced Exploration*	Mobile-compatible games designed to support adult English language learners' listening and reading skills; can tailor content for different industries
Softschools.com	*Softschools.com*	Online provider of math, grammar, and phonics worksheets and study games for elementary- and middle-school students
Sumdog	*Sumdog*	Online multiplayer games for math, reading, and writing that ask students Common Core–aligned questions that adapt to the student's proficiency level
Teaching.com	*Nitro Type*	Online typing game in which the speed of a race car is controlled by the speed of the player's typing
TED	*TED Talks*	Online video lectures covering academic and general-interest topics
Teknimedia	*Computer-Based Testing Prep*	Courseware package designed to equip adults with the digital literacy skills necessary to take the GED

COMPANY	PRODUCT	PRODUCT OVERVIEW
The NROC Project	*EdReady*	Online preparation for placement exams that determines a student's aptitude for ACT Compass or ACCUPLACER and provides materials to fill knowledge gaps
Think60	*Online Curriculum for Adult Education*	Courseware designed for adult basic education students that covers core subjects
USA Learns	*USA Learns*	Online resource for adults to improve English speaking, pronunciation, listening, reading, spelling, writing, and grammar
Vocabulary.com	*Vocabulary.com*	Adaptive online game for increasing vocabulary; designed for all levels of learners
Weebly	*Weebly*	Website-building platform with drag-and-drop interface
WordPress.com	*WordPress*	Website-building platform with drag-and-drop interface
World Education	*The Change Agent*	Social-justice-themed adult education magazine for teachers and students, with texts at different reading levels
World Education	*Words2Learn Mobile Learning Project*	Mobile application with academic and career vocabulary exercises for English language learners
YouTube	*YouTube*	Repository of online videos

ACKNOWLEDGMENTS

BIOGRAPHIES

ADAM NEWMAN, *Managing Partner*

Adam Newman is a co-founder of Tyton Partners and has more than 20 years of experience in strategy consulting, market research, and investment banking supporting the education sector. Adam began his professional career as a K–12 educator and athletic coach at schools in Boston, MA, and New Orleans, LA.

TANYA ROSBASH, *Principal*

Tanya Rosbash has spent the past seven years working with public and private companies, non-profits, and government organizations as a strategy consultant and market research professional. As a principal at Tyton Partners, Tanya leads strategy and growth initiatives for companies and organizations across the education sector.

LAURA SARKISIAN, *Associate*

Laura Sarkisian joined Tyton Partners as an associate in 2014 to concentrate on supporting growth within the education sector. Her background is focused in finance and economics and includes research on the affordable housing and healthcare markets.

OUR PARTNERS

ABOUT THE JOYCE FOUNDATION

The Joyce Foundation invests in solutions to pressing economic and social challenges that affect the quality of our lives, the well-being of our communities and the fairness of our society. Its primary geographic focus is the Great Lakes region, but it has national reach and impact. Joyce moves ideas to action by supporting the development, testing and advancement of policies to better educate our children, expand economic opportunity, increase participation and responsiveness in our democracy, clean up and restore our natural environment, diversify arts and culture and protect communities from gun violence. It also supports programs to improve the performance of institutions and systems whose actions determine if policy solutions are effective. Founded in 1948 and based in Chicago, Joyce has assets of $950 million and distributes approximately $45 million annually.

For more information, please visit **www.joycefdn.org** or follow us at **@JoyceFdn**.

ABOUT THE COMMISSION ON ADULT BASIC EDUCATION

The Commission on Adult Basic Education is organized to advance national and international adult education and literacy opportunities for all persons. The purposes of COABE are:

- To promote adult education and literacy programs, including Adult Basic Education, Adult Secondary Education, English for Speakers of Other Languages, Family Literacy, Skills Development, Workforce Development, and other state, federal, and private programs which assist undereducated and/or disadvantaged adults to function effectively

- To provide leadership in advancing the education of adults in the lifelong learning process by unifying the profession, developing human resources, encouraging and using research, communicating with the members and the public, offering other member services, and otherwise advancing adult education and literacy

- To advocate the development and dissemination of publications, research, methods, and materials, resources, and programs in adult education and literacy

- To conduct and/or sponsor professional development conferences and activities that provide a forum to provide staff development and advance adult education and literacy

To learn more about COABE, visit **www.coabe.org**.

ABOUT TYTON PARTNERS

Tyton Partners, formerly Education Growth Advisors, is the leading provider of investment banking and strategy consulting services to the global knowledge sector. Built on the tenets of insight, connectivity, and tenacity, Tyton Partners leverages in-depth market knowledge and perspective to help organizations pursue solutions that have lasting impact.

As an evolved advisory services firm, Tyton Partners offers a unique spectrum of services that supports companies, organizations, and investors as they navigate the complexities of the education, media, and information markets. Unlike most firms, Tyton Partners understands the intricacies and nuances of these markets and plays an integral role in shaping the efforts that drive change within them. The firm's expertise is predicated on its principals' years of experience working across market segments – including the preK–12, postsecondary, corporate training, and lifelong learning sectors – and with a diverse array of organizations, from emergent and established private and publicly traded companies, to non-profit organizations, institutions, and foundations, to private equity and venture capital firms and other investors.

Tyton Partners leverages its deep foundation of transactional and advisory experience and an extensive global network to make its clients' aspirations a reality and catalyze innovation in the sector.

For more information about Tyton Partners, visit *tytonpartners.com*
or follow us at *@tytonpartners*.