Technology-Based Coaching in Adult Education (TBCAE) Toolkit

December 2021

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Technology-Based
TBCAE
Coaching in Adult Education

Abt
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Acknowledgements

Adult Education Programs in the TBCAE Project

Arizona
- Cochise College (Sierra Vista, AZ)
- Pima Community College (Tucson, AZ)

Indiana
- Jennings County Educational Center (North Vernon, IN)
- McDowell Education Center (Columbus, IN)
- Neighbors' Educational Opportunities (Portage, IN)

Kentucky
- Gateway Community & Technical College (Florence, KY)
- Laurel County Adult Education & Literacy (London, KY)
- Southcentral Kentucky Community & Technical College (Bowling Green, KY)
- Thorn Hill Education Center (Frankfurt, KY)

Oregon
- Mt. Hood Community College (Gresham, OR)

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I. Introduction to Toolkit and Overview of TBCAE Project

A longstanding challenge for adult education (AE) program staff is how to support learners' persistence in developing their foundational skills so they can achieve their educational goals that can lead to their improved social and economic well-being. Among the factors that affect adults' regular participation in AE programs are competing demands in their lives, lack of childcare and transportation, limited access to resources that enable them to focus on their learning, or instruction that does not sustain their engagement or help them learn.[1]

Although AE staff likely cannot help learners address some of those challenges, they can motivate learners to persist in their studies, and provide instruction that is engaging and helps build learners' basic skills and self-efficacy. Staff can also connect learners to resources that can help mediate their barriers to participation in AE.

A promising approach to addressing U.S. high school learners' access to financial aid and enrollment in higher education is "nudging" learners through text messaging. Recent studies have found that text messaging can be a low-cost, efficient method of communicating with learners to help them navigate the complex financial aid process and keep them on track in meeting submission deadlines.[2] Of particular interest are efforts in the U.K. to examine the use of text messaging to increase adult learners' attendance and attainment in adult literacy and numeracy programs.[3]

To explore the potential of text messaging to support AE learners' persistence and success in AE programs, Abt Associates is conducting the "Increasing Student Retention through Technology-Based Coaching" project (known as Technology-Based Coaching in Adult Education—TBCAE) under funding from the U.S. Department of Education's Office of Career, Technical, and Adult Education (OCTAE). During the implementation phase of the TBCAE project, Abt Associates assisted 10 AE programs in four states to send individualized and personalized text messages to support AE learners' retention in program services; development of foundational skills (e.g., reading, writing, numeracy, problem-solving); attainment of a secondary credential; and pursuit of

Benefits of the *TBCAE Toolkit*

The *TBCAE Toolkit* provides meaningful benefits to AE staff by offering:

- A process for integrating text messaging into AE programs' services as key to supporting learners' persistence and learning.

- Tools to plan the intentional use of *individualized* and *personalized* text messaging as proactive communication that anticipates and addresses challenges that learners encounter.

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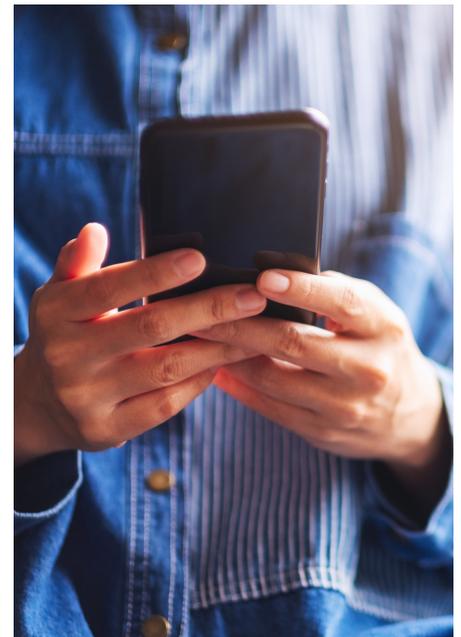
[1] National Research Council. (2012). Improving adult literacy instruction: Options for practice and research. Committee on Learning Sciences: Foundations and Applications to Adolescent and Adult Literacy, A.M. Lesgold and M. Welch-Ross, Eds. Division of Behavioral and Social Sciences and Education. The National Academies Press. https://doi.org/10.17226/13242

[2] Bird, K. A., Castleman, B. L., Denning, J. T., Goodman, J., Lamberton, C., & Ochs Rosinger, K. (2019). Nudging at scale: Experimental evidence from FAFSA completion campaigns. Working Paper 26158. National Bureau of Economic Research.

[3] Sanders, M., Kirkman, E., Chande, R., Luca, M., Linos, E., & Soon, X. (2019). Using text reminders to increase attendance and attainment: Evidence from a field experiment. Available at SSRN: https://ssrn.com/abstract=3349116

further education, training, or employment (see Exhibit 1). More than 400 AE learners participated in the TBCAE project.

Exhibit 1. Participating states and AE programs in TBCAE
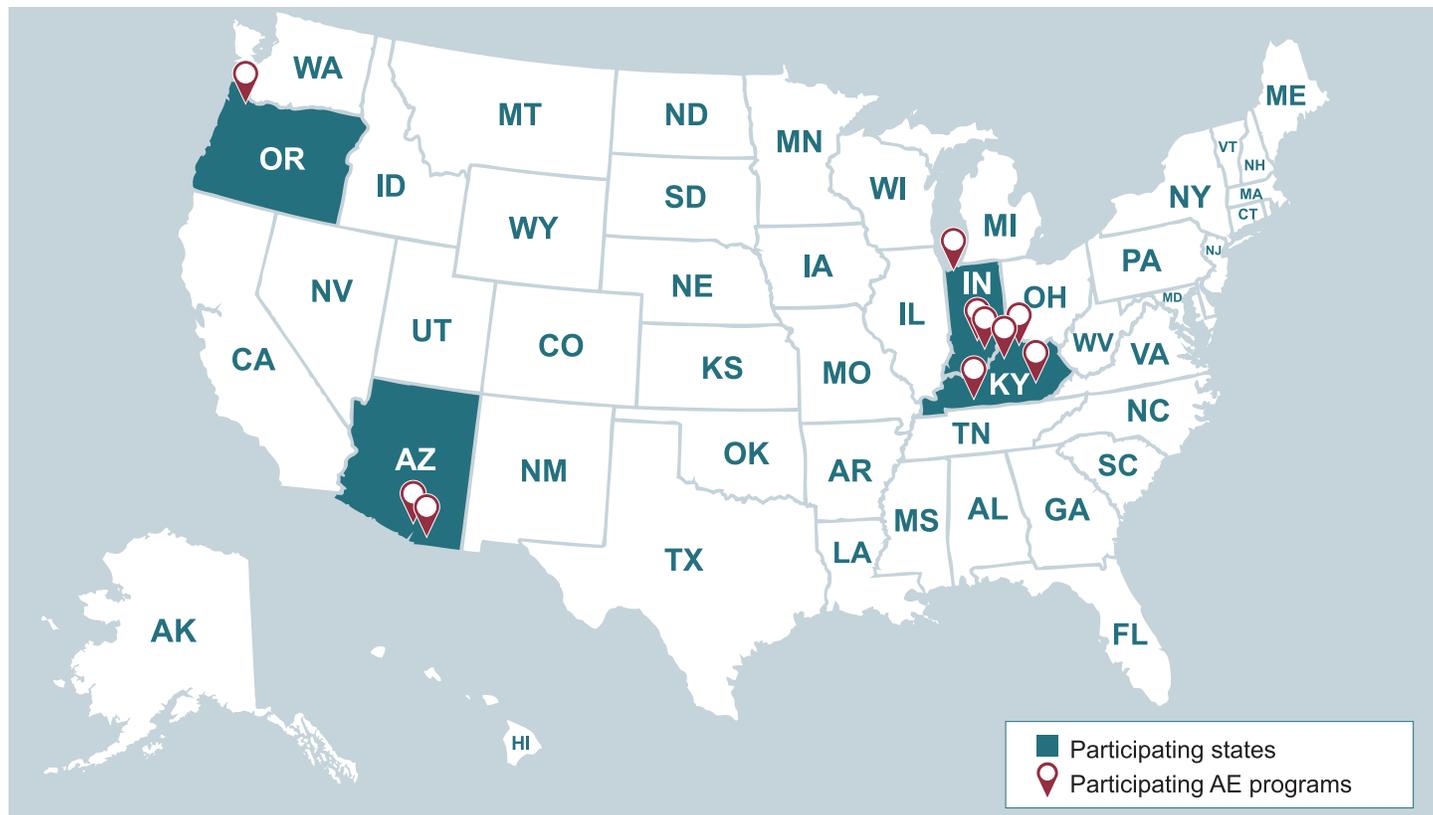
This *TBCAE Toolkit* describes the steps that AE program administrators and staff can take to plan and implement text messaging to coach and support AE learners' participation in AE services. The guidance in the toolkit is drawn from Abt Associates' work on the TBCAE project and from Abt Associates' study of the Transition Planning Process that was conducted in seven of Oregon's Adult Basic Skills programs. In that study we examined the impacts of the use of text messaging on adult learners' attainment of a General Educational Development (GED®) credential and enrollment in postsecondary education.[4]

We designed this toolkit for AE program staff and AE state leadership. AE program staff can use the toolkit to plan and implement a text messaging intervention that supports learners' program participation and attainment of education outcomes. The toolkit can also help AE state leadership in planning state technical assistance activities to promote and support the use of text messaging by AE program staff.

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[4] Study of the Effects of Transition Planning Process (TPP) on Adult Basic Skills Learners' GED® Attainment and Enrollment in Postsecondary Education, U.S. Department of Education, Institute of Education Sciences, Grant# R305L170012 to Abt Associates. https://ies.ed.gov/funding/grantsearch/details.asp?ID=1950

TBCAE Project Approach and Implementation

For the TBCAE project, Abt Associates' approach to the use of text messaging with AE learners considered the research on adult motivation, persistence, and academic self-efficacy[5,6] and recent studies of technology-based coaching that point to the importance of non-academic factors in supporting adult learners' academic success.[7] Because previous studies of the delivery of automated group text messages to students entering and participating in postsecondary education have shown mixed results,[8] we focused the TBCAE project on the use of *individualized* and *personalized* text messages that can be supplemented with group text messages.

We developed a theory of change for the TBCAE project that specified assumptions about the behaviors of AE staff and learners and that guided the technical assistance that we provided to AE program directors and staff. Our assumptions included:

- AE staff use of text messages to provide feedback to learners on their progress and to prompt them to achieve their goals would reinforce their participation in AE and lead to their success in the program.

- A low-cost, easy-to use tool such as text messaging is an activity that AE staff can use to provide personalized help to support AE learners' attendance, engagement in AE program activities, development of foundational skills, testing for a secondary credential, earning of occupational credentials, or transitioning to postsecondary education.

- Sending of text messages by AE staff might prompt a response from learners, or learners might not respond to the text messages but still act on the information the text messages provided.

- The use of text messaging by AE learners can enable them to ask AE staff questions and receive personalized help outside of designated instructional or support time.

- Learners can be motivated by the text messages, and AE staff can be reinforced by learners' responses.
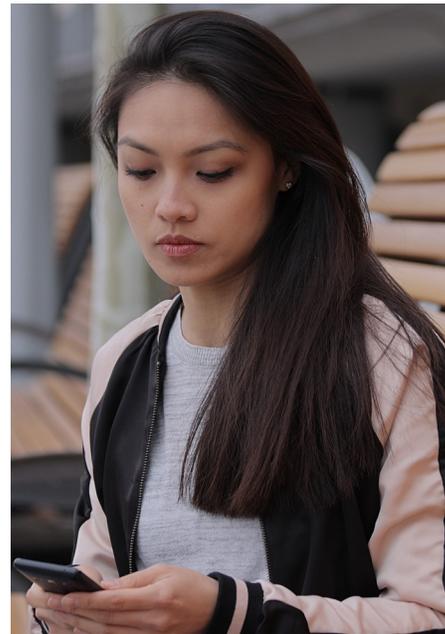
> "Before the project, I had only used text messaging to send out announcements to groups of students. But this time, I sent out individual messages to students. I think the students were more responsive to the individual messages. I think it was also helpful for students who were not as active, getting that text message was helpful because they would be reminded to check back in. Some students I was checking in about testing and others about attendance, sharing resources, financial aid… or whatever they needed. It was good to personalize the messages to students' needs."
>
> **—AE Program Staff**

[5] Markle, R. & O'Banion, T. (2014). Assessing affective factors to improve retention and completion. Learning Abstracts 17, no. 11. www.league.org/occasional-papers/assessing-affective-factors-improve-retention-and-completion

[6] National Research Council. (2012). Improving adult literacy instruction: Supporting learning and motivation. The National Academies Press. https://doi.org/10.17226/13469

[7] Oreopoulos, P., Petronijevic, U., Logel, C., & Beattie, G. (2018). Improving non-academic student outcomes using online and text-message coaching. Working Paper 24992. National Bureau of Economic Research.

[8] Oreopoulos, P., & Petronijevic, U. (2019). The remarkable unresponsiveness of college students to nudging and what we can learn from it. Working Paper 26059. National Bureau of Economic Research.

- • The use of text messaging with AE learners can lead to immediate outcomes such as increased persistence, or near-term outcomes such as increased skill development.

We designed the TBCAE project's processes and content based on these assumptions in our theory of change. We worked with staff in four AE state offices to identify potential AE programs for the project and provided technical assistance to the staff from the 10 AE programs that agreed to participate. We guided AE program staff in identifying which learners' goals to support using text messages, in recruiting learners to participate in the TBCAE project, and in developing and sending text messages that could support learners' attainment of their educational goals.

This approach with the 10 programs provided several lessons about using text messaging to engage AE learners, including how AE programs navigated the challenges posed by the COVID-19 pandemic. The lessons are shared in this toolkit.

Overview of Tools for Planning and Implementing Text Messaging

The toolkit provides tools, checklists, forms, and other resources that AE program staff can use to plan and implement text messaging in their AE programs. These documents can help program staff determine how to use text messaging and with whom; what types of text messages will support AE learners to persist and succeed; and how to review information from learners' text messages to identify challenges that they face participating in AE and possible ways to address those challenges. This toolkit also offers examples of the wording from the TBCAE project and from Abt Associates' study of Oregon's Transition Planning Process.

Exhibit 2 lists the tools, checklists, forms, and other resources discussed in this toolkit, where they fit in the planning and implementation processes, their purposes, and their location in the appendix.

Sample Text Conversation

AE Staff (2/15, 3:39 PM):
Hi, it's Lena from NextDoorABE. How are things going? Do you need anything?

Learner (2/15, 3:40 PM):
Not for math. I didn't pass my social. I was more focusing on graphs instead of history. 80% of the test was mostly on civics.

AE Staff (2/15, 3:47 PM):
Do you have a civics book?

Learner (2/15, 3:48 PM):
I have some notes from class and the books you gave me.

AE Staff (2/15, 3:52 PM):
I just sent you a few more things. Check your email.

Learner (2/15, 4:02 PM):
Ok, thank you.

"For students who were more responsive, we both got a lot out of it. I was able to connect more closely with certain students than I have been able to in the past. I feel like we would make calls and do emails but with text messaging you can really do that immediate response and ask them quick questions and they can get back to you. It really helped to get the information we both needed a lot faster and it was easier to ask questions and get them resources more quickly. I also liked to use it as a follow up to phone meetings with students."

—AE Program Staff

Exhibit 2. Tools, Checklists, Forms, and Other Resources to Support Planning and Implementing Text Messaging

Step in Planning and Implementing Text Messaging	Purpose of Tool, Checklist, Form, or Resource	Name of Tool, Checklist, Form, or Resource and Location in Toolkit
Planning Steps		
1. Specify Goals for Use of Text Messaging with Learners	Discuss learners' outcome data and other considerations to determine learners' goals that staff will support using text messaging.	***Program Planning Tool*** Appendix A
2. Identify Population(s) of Learners Who Will Be Sent Text Messages	Consider the learners' goals that the AE program will support using text messaging to identify the group(s) of learners who could benefit from receiving text messages.	
3. Identify the Staff Who Will Send Text Messages to Learners	Consider learners' goals that the AE program will support using text messaging and the targeted learner group(s) to determine which staff will send individualized and group text messages to support learners, and which staff will send group text messages concerning the program's administrative operations.	
4. Determine the Options for Sending Text Messages to Learners	Decide whether the AE program will use a text messaging platform or another tool to send text messages to support learners.	***Checklist of Text Messaging Platform Features*** Appendix B
Implementation Steps		
1. Prepare Staff to Compose Text Messages that Support Learners' Goal Attainment	Decide what types of text messages staff will compose to send to learners to support their attainment of goals. • Identify the actions that learners take in working toward their goals. • Identify the information that staff need about learners' actions to support them. Specify the types of text messages that staff could send to facilitate learners' attainment of their goals. Examples of text messages to send to AE learners are provided.	***Text Messaging Implementation Tool*** Appendix C ***Text Message Planning Form*** Appendix D ***TBCAE Compendium of Text Messages*** Appendix J
2. Prepare Staff to Send Text Messages	Decide how staff will be trained to use either a text messaging platform or another tool to support learners using text messaging.	***Text Messaging Implementation Tool*** Appendix C

Step in Planning and Implementing Text Messaging	Purpose of Tool, Checklist, Form, or Resource	Name of Tool, Checklist, Form, or Resource and Location in Toolkit
Implementation Steps		
3. Prepare Guidelines for Staff's Use of Text Messaging with Learners	Decide what types of guidance the AE programs will provide to facilitate the exchange of text messages between staff and learners (e.g., schedule for checking and responding to messages).	***Checklist for Preparing Staff to Use Text Messaging*** Appendix E
4. Develop Learner Recruitment and Orientation Processes	Decide the process for identifying learners who are willing to participate in text messaging with staff. Decide what information to use in orienting learners to participate in text messaging.	***Learner Communication Preference Form*** Appendix F ***Checklist for Orienting Learners to Text Messaging*** Appendix G
5. Conduct Survey of Learners on Utility of Text Messages	Provides sample messages staff can use to conduct a follow-up survey of learners to assess their perceptions of the helpfulness of the text messages.	***Sample Text Messages to Obtain Learner Feedback on Using Text Messaging*** Appendix H
6. Track the Frequency and Topics of Text Messages	Provides a form for staff to document the numbers and topics of text messages that they send to and receive from learners; helps to identify new information, processes, or resources that are needed to facilitate learners' participation and success in the AE program.	***Text Message Tracking Form*** Appendix I
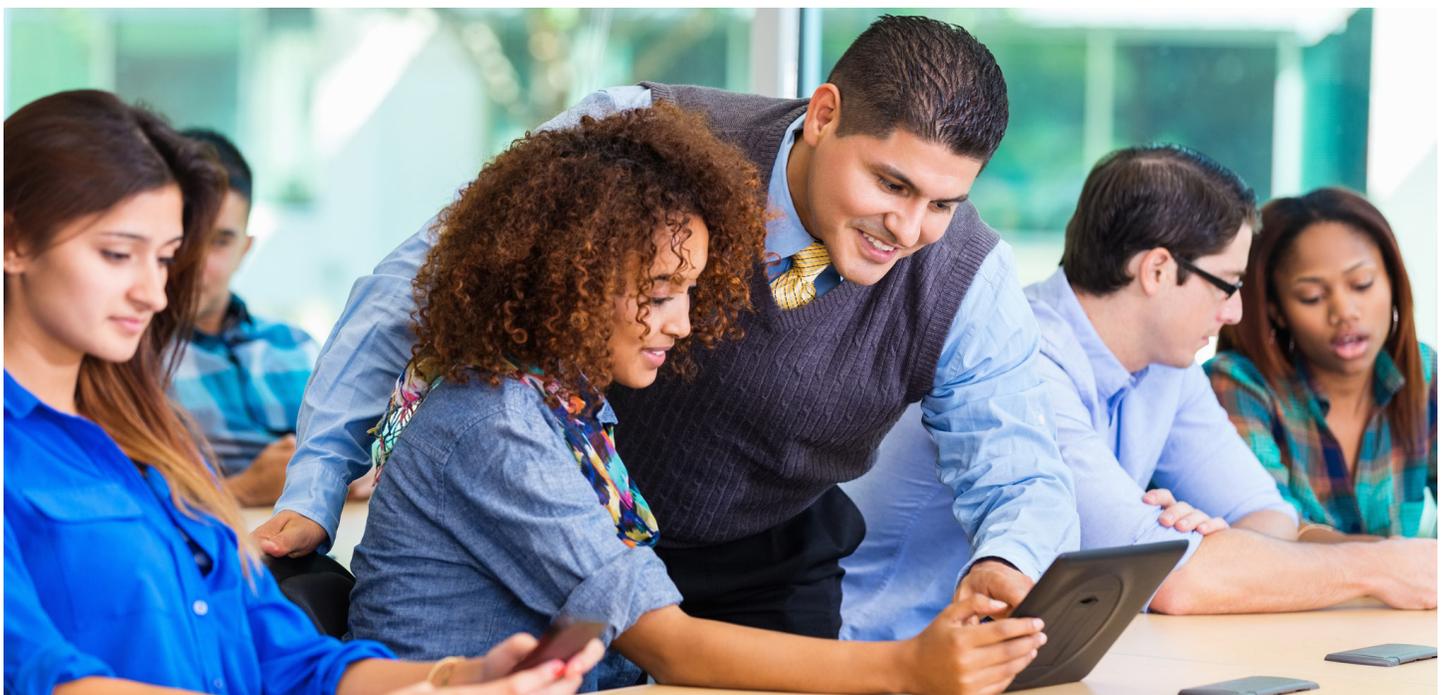
II. Planning Text Messaging in Adult Education Programs

Using text messaging in an intentional way to support learners' participation in AE requires careful planning. The AE program director and staff will want to work together in deciding the learners' goals that will be the focus of text messages. These goals will help determine the population(s) of learners who are asked to participate and the staff who will use text messaging in coaching learners. Information also will need to be gathered to figure out the tool(s) that will be used in exchanging text messages with learners. The *Program Planning Tool* (Appendix A) can facilitate staff's work in preparing to begin text messaging.

1. Specify Goals for Using Text Messaging with Learners

The first step in planning the use of text messaging is for AE staff to identify learners' goals they can support through text messaging by reviewing the program's National Reporting System (NRS) and other AE program data on learners' participation and progress in AE programs. Those data about learners are:

- Demographic characteristics,
- Attendance patterns,
- Educational Functioning Level (EFL) and progress in increasing it,
- Secondary credential test-taking patterns,
- Secondary credential attainment,
- Postsecondary enrollment,
- Progress in attaining milestones in Integrated Education and Training (IET) or workplace programs, and
- Job attainment or advancement.

Process for Reviewing Data
Reviewing data can help staff identify gaps in learners' performance or data patterns that suggest that learners could benefit from prompting and/ or guidance in working toward their goals. For example, staff can:

- ✓ Review NRS data to determine whether populations of learners (e.g., those at a specific EFL at enrollment) have lower rates of increasing their EFL compared to other groups of learners.
- ✓ Examine postsecondary enrollment data to determine whether learners who entered the AE program with a goal for postsecondary participation are achieving their goal. If a low percentage of learners are attaining their goal, staff might examine the reasons for the low success rate. Those data patterns can suggest that learners might

Program Planning Tool

Section I. Specify Goals for Use of Text Messaging with Learners

Planning Steps:

A. Review learners' outcome data in your program's most recent NRS tables. Check the learner outcomes below that did not meet your program's performance targets or that are an area of concern for reasons other than performance.

- ☐ Attendance
- ☐ Skill gains
- ☐ HSE completion
- ☐ Postsecondary enrollment
- ☐ Progress in IET/workplace programs
- ☐ Job placement or advancement

B. Discuss areas of learners' participation that could be better supported (e.g., persistence, access to supportive services).

C. Review the results from Activity A and B above to determine which goals staff can support by using text messaging. Identify one or two goals that could be tracked in the near-term (e.g., a semester, a term, one program year).

benefit from targeted encouragement or feedback that staff could deliver by using personalized text messages.

✓ Review information gathered about learners' barriers to participation and other circumstances that can hinder learners' attendance or progress (e.g., access to technology). For example, say AE staff observe that learners entering the AE program with math and reading skills close to the secondary level and who have a goal of obtaining a High School Equivalency (HSE) credential are not taking the HSE credential's subject tests. Then, staff would want to explore whether those learners could benefit from receiving personalized text messages to motivate them to participate in the HSE testing. Or, staff might ask learners whether they are experiencing barriers to taking their HSE subject tests that the AE program could address. Staff could use text messaging to communicate with learners about resolving those barriers.

Considerations in Determining Goals to Support

Which goals an AE program's text messaging might address is affected by the timeframe during which the text messaging will be implemented. Different AE programs organize their services according to different timeframes, such as by semester, term, or on a rolling entry basis. Text messaging should support goals that learners can achieve within a specific timeframe. Programs just beginning to use personalized text messaging could test it for a specific period, such as a semester. Over a semester, for example, staff could encourage learners to take an HSE "ready" or "practice" test and begin taking the subject tests required to earn an HSE credential. Over an entire program year, staff could focus text messaging on goals likely to take learners more than a few months, such as developing their foundational skills as measured by an increase in their EFL.

Tip: For AE programs new to text messaging, start small.

- Select learners at the same skill level or with a similar goal (e.g., intermediate ESOL learners; HSE attainment) to begin using personalized text messaging.
- Specify a timeframe, such as one term or semester, to test the process.
- Decide when staff should initiate messages. Track staff's time sending and responding to text messages to identify the level of effort needed for sending text messaging.

Actions for AE Program Staff:

☐ Review learners' background and outcome data to identify learners' outcomes that could be strengthened.

☐ Consider other information staff have about learners' participation and barriers to achieving their outcomes to understand the types of assistance learners may need to attain their goals.

☐ Decide the timeframe during which the initial implementation of personalized text messaging will take place.

☐ Specify the goals for supporting learners' outcomes using personalized text messaging based on the above activities.

☐ Refer to the *Program Planning Tool* (Appendix A) and complete Section I.

Tool:

- *Program Planning Tool* (Appendix A)

2. Identify Populations of Learners Who Will Be Sent Text Messages

The next step in planning the use of text messaging is to identify the group(s) of AE learners who could benefit from receiving personalized text messages from AE staff. The learner data that staff review in determining the goals for text messaging can help guide them in selecting which learners to recruit to participate in text messaging.

The AE programs participating in the TBCAE project found it helpful to begin using personalized text messaging by working with learners with similar goals. This approach to implementing text messaging enabled staff to try out the practice with a manageable number of learners. For example, one program recruited learners from its GED® Plus dual enrollment program to participate in text messaging. These learners were earning a GED® credential while participating in an occupational training program, and learners had several benchmarks to meet to be successful in both activities. Because those benchmarks were known to both learners and staff at the beginning of the program, the staff member sending the text messages set up a system to track learners' progress and was able to send personalized text messages reminding them of the upcoming benchmarks. The proactive text messages helped learners to keep on schedule and meet their goals.

> *Program Planning Tool*
>
> **Section II. Identify Populations of Learners Who Will be Sent Text Messages**
>
> **Planning Steps:**
>
> Based on the goals for using text messaging from Section I: Activity C, identify the group(s) of learners who could benefit from receiving text messages (e.g., learners preparing for the HSE test).

Actions for AE Program Staff:

☐ Review the goals for text messaging and identify a group of learners with similar goals who could benefit from personalized text messaging within the timeframe that the program set for text messaging.

☐ Refer to the *Program Planning Tool* (Appendix A) and complete Section II.

Tool:

• *Program Planning Tool* (Appendix A)

3. Identify the Staff Who Will Send Text Messages to Learners

After the program specifies which group(s) of learners it will recruit to participate in personalized text messaging, the next step is to identify which staff member(s) will send the text messages. This selection will depend on which learners' goals will be supported and what types of staff are available and interested in engaging with learners using text messaging. Many AE programs have staff who provide advising, coaching, or career navigation services to help learners progress toward their goals, develop career plans, and prepare for their next steps after participating in AE services. It was those types of staff that the AE programs in the TBCAE project selected to deliver personalized text messages to learners. Some

> **Tip: A key element for implementing text messaging is collaboration.**
>
> Successful implementation of text messaging requires that AE staff communicate with one another to ensure that the staff sending the text messages have the information they need to make their messages relevant and timely.

TBCAE programs also involved AE instructors in the text messaging effort to encourage learners' participation and success in instruction.

One consideration in having advising, coaching, or career navigation staff deliver personalized text messaging is whether they can obtain information they need from instructors about learners' progress and challenges. Staff need to know in advance about upcoming HSE subject tests, class assignments, or other AE program activities, if they are to send learners reminder text messages. Similarly, staff sending text messages to support learners will need to be notified as soon as learners do not participate in instruction or miss key benchmarks related to their progress.

In addition to sending personalized, individualized text messages to learners, staff might also want to send group text messages that are relevant to groups of learners, such as information about deadlines for applying for federal financial aid or upcoming activities on career planning.

Another type of group text message that AE programs send are about the program's administrative operations that pertain to all program participants, not just those engaged in text messaging with advising and instructional staff. For example, programs might need to notify participants about the schedule and location of classes, program closures, and other administrative information. In the TBCAE project, the types of staff who were responsible for sending such types of text messages included administrative staff, instructors, and advising staff. In addition to specifying which staff will send personalized, individualized text messages, AE programs also could identify which staff will send group text messages concerning AE program operations.

Program Planning Tool

Section III. Identify the Staff Who Will Send Text Messages to Learners

Planning Steps:

A. Based on the goals for using text messaging and the targeted learner group(s) from Sections I and II, discuss which staff will send individualized text messages to help learners achieve their goals.

☐ Advisor/Coach/ Career Navigator

☐ Instructor

☐ Other (specify)

B. Discuss whether group text messages about the program's administrative operations (e.g., program closures) will be sent by one designated staff person.

☐ Advisor/Coach/Career Navigator

☐ Instructor

☐ Administrative staff

☐ Other (specify)

Actions for AE Program Staff:

☐ Review the goals for text messaging and the targeted learner group(s) to identify which staff will send individualized, personalized messages and which will send group text messages.

☐ Refer to the *Program Planning Tool* (Appendix A) and complete Section III.

Tool:

• *Program Planning Tool* (Appendix A)

4. Determine Options for Sending Text Messages to Learners

The final step in planning is for an AE program to determine what options staff will use in sending text messages to learners. To begin, the AE program director can ask the staff sending personalized text messages whether they already have been using text messaging with learners; and if so, which text messaging tool or online text messaging platform they have used.[9]

If staff have not already been sending text messages to learners, one option may be for the AE program director to find out whether the AE program's fiscal agent has adopted an online text messaging platform. If so, AE programs located in community colleges, local education agencies, or community-based organizations might be able to be added as users to that agency's text messaging platform. Another option is for the AE state office to provide AE programs with access to an online text messaging platform through the office's contract with a text messaging platform provider.

The use of a common online text messaging platform will enable the AE program to be systematic in the way in which staff send text messages to learners. Staff's use of the same text messaging platform facilitates coordination among staff within an AE program and permits continuity of service for learners when there is turnover in AE staffing. The use of a common platform facilitates review and analysis by staff of the text messages that are sent to and received from learners. The desirable features of a text messaging platform identified by the TBCAE project are shown in Exhibit 3.

There are more advanced text messaging platform capabilities that AE programs might want to consider (see Appendix B). AE program staff can use the *Checklist of Text Messaging Platform Features* (Appendix B) to gather information from potential platform providers.

AE programs that are not able to use an online text messaging platform will need other options for sending text messages. Examples of other text messaging tools are WhatsApp, Facebook Messenger, a mobile phone that the AE program provides, and Google applications such as Google Classroom and Voice. The least desirable option is for staff to use their own mobile phones because of privacy concerns.

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[9] AE programs participating in the TBCAE project used the Signal Vine and Remind text messaging platforms.

Program Planning Tool

Section IV. Determine the Options for Sending Text Messages to Learners

Planning Steps:

A1. Discuss whether staff are currently sending text messages to AE learners.

☐ Yes   ☐ No

A2. If yes, identify the text messaging tools or platforms that staff are using to communicate with learners.

B1. If staff are not using a text messaging tool with learners OR are not using an online text messaging platform (e.g., Signal Vine, Remind), determine whether the program currently has access to or could access a text messaging platform that staff could use to communicate with learners.

B2. If the program is considering using a text messaging platform, review the *Checklist of Text Messaging Platform Features*:

– Discuss the program's high-priority features for a text messaging platform.

– Compare possible text messaging platforms on these features.

– Select the text messaging platform that best meets the program's criteria for features.

B3. OR—If the program will not use a text messaging platform, discuss the minimum features of the tool that staff will use to communicate with learners, such as WhatsApp, Facebook Messenger, Google applications (e.g., Google Classroom, Google Voice), or another tool.

Actions for AE Program Staff:

☐ Review the current use of text messaging tools by staff and the AE program's access to an online text messaging platform.

☐ Use the *Checklist of Text Messaging Platform Features* (Appendix B) to document information that an AE program director and staff collect about possible text messaging platforms.

☐ Refer to the *Program Planning Tool* (Appendix A) and complete Section IV.

Tool:

• *Program Planning Tool* (Appendix A)

• *Checklist of Text Messaging Platform Features* (Appendix B)
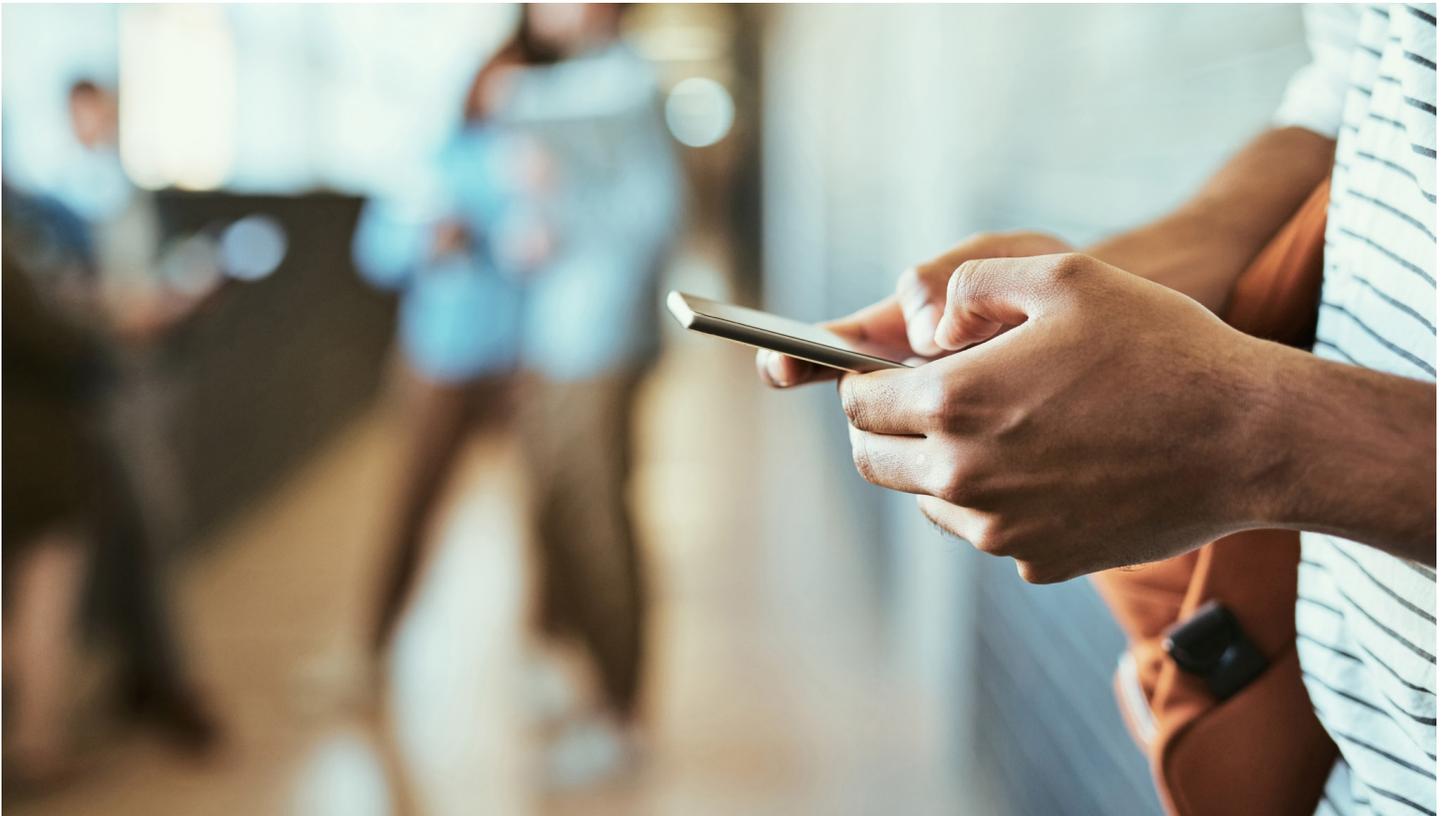
Exhibit 3. Desirable Features of a Text Messaging Platform

An AE program that can contract with an online text messaging platform provider should check that an online text messaging platform has the following features:

- **Provides a phone number for text messaging.** A dedicated phone number prevents staff from having to use their own mobile phone numbers to communicate with learners.

- **Sends and receives text messages.** Two-way communication is critical so that learners can initiate as well as respond to text messages.

- **Stores the conversation.** When conversation strings between staff and learners are stored, staff can review prior correspondence with learners as part of planning their follow-up text messages to learners.

- **Organizes learners in groups.** Learners in AE programs could be enrolled in different classes or served by different staff. When learners can be organized by class, timeframe, staff, or other categories, staff can more easily send targeted text messages to specific learner subgroups.

- **Sends group text messages.** This feature allows staff to send announcements to all or a specific group of learners.

- **Adds learners and updates learner information.** AE programs that have open enrollment need to be able to add learners to the text messaging platform quickly. Also, because learners' mobile phone numbers can change during their participation in an AE program, it is important that staff can easily update the contact information as well as other information such as class name.

- **Is hosted on a secure platform.** The platform must be secure and be password-protected and enable staff to have individual login accounts.

- **Can be accessed on a mobile device.** A mobile-friendly option is preferable to being accessible only via a desktop computer or laptop; this feature allows staff to view and respond to learner messages when they are not at their computers.

- **Sends an immediate text notification.** An immediate notification of an incoming text message from a learner can remind staff to check the platform and respond more quickly.

III. Implementing Text Messaging in Adult Education Programs

To be successful in using text messaging with AE learners, staff will need to understand the range of activities that learners will need to conduct to attain their goals and the challenges they are likely to encounter in completing those activities. Staff can use this information to plan the content and timeline of their text messages to learners. Staff will also need to develop procedures for recruiting learners to participate in text messaging and for telling them about the timeframes during which staff will be available to respond to their text messages.

Staff's collection and review of data can be used to strengthen AE programs' use of text messaging. Follow-up survey data about learners' perceptions of the utility of text messages can help staff refine their text messages. Staff's periodic review of the content of the text messages exchanged between staff and learners can help inform program improvement processes.

1. Prepare Staff to Compose Text Messages that Support Learners' Goal Attainment

The key activity in implementing text messaging with AE learners is staff's planning for and composing of text messages to send to learners. The findings from Abt Associates' study of Oregon's Transition Planning Process and the TBCAE project provide insights about the types and topics of text messages that AE staff have sent to learners in AE programs. As shown in Exhibit 4, AE staff in those projects have used four types of individualized text messages to support AE learners. Those messages:

- *Ask questions* about the reasons for learners' lack of persistence, difficulties with an AE program's administrative procedures, ability to access and use technology, and progress in working toward their goals for participating in AE services.

- *Provide guidance* to learners about their participation in the AE program or courses, developing their psychosocial skills to succeed in education or work, and making the transition to further education or training.

- *Provide feedback* that is customized to learners' specific behaviors and that addresses their academic and personal progress and attainment of goals for participating in AE, reinforces their motivation to succeed, and addresses barriers to their success.

- *Provide information, materials, and other resources* to support learners' participation in courses and program activities; use of technology; and preparation for next steps in education, training, or employment.

Steps in Implementing Text Messaging

1. Prepare Staff to Compose Text Messages that Support Learners' Goal Attainment

2. Prepare Staff to Send Text Messages

3. Prepare Guidelines for Staff's Use of Text Messaging with Learners

4. Develop Learner Recruitment and Orientation Processes

5. Conduct Survey of Learners on Utility of Text Messages

6. Track the Frequency and Topics of Text Messages

Text Messaging Implementation Tool

Section I. Prepare Staff to Compose Text Messages to Support Learners' Goal Attainment

Implementation Steps:

A1. Review learners' goals that the program will support through text messaging. See the *Program Planning Tool*.

A2. Discuss the actions learners will take to attain each of their goals (e.g., actions associated with attaining a HSE credential; actions associated with transitioning to postsecondary education; actions to enhance their reading, writing, and math skills). See the *Text Message Planning Form*.

Exhibit 4. Typology of Text Messages for Coaching and Supporting Adult Education Learners

Ask Questions

- Barriers to learner persistence
- Program administrative procedures
- Access to and use of technology
- Review goals for participation

Provide Guidance or Advice

- Operation of AE program or courses
- Developing learner success skills
- Transitioning to further education or training

Adult Learner Outcomes

Provide Customized and Generalized Feedback

- Progressing academically and personally
- Attaining goals
- Reinforcing and motivating success
- Addressing barriers to success

Provide Information, Materials, and Resources

- Participation in AE courses and program activities
- Use of technology
- Processes for next steps in education, training, or employment

AE staff will want to consider those categories of text messages in planning how to engage learners in text messaging. For example, AE staff in the TBCAE project found that their initial text messages to learners were more likely to prompt a response if the messages included specific questions about learners' activities in the AE program. Learners were less likely to respond to open-ended questions about how staff could support them. To encourage learners' use of text messaging, AE staff also needed to remind learners about the types of assistance and information that AE staff could provide in the messages.

To prepare to send text messages to learners, AE staff will want to:

- Review learners' goal(s) that the AE program will support through text messaging as recorded on the *Program Planning Tool* (Appendix A). For example, goals might be to develop reading and writing skills, improve English language skills, attain an HSE credential, or enroll in a career and technical education course.

- Think about the actions that learners will take in working toward their goal(s) to anticipate the types of text messaging prompts, reinforcement, and information they may need. Record these on the *Text Message Planning Form* (Appendix D). For example, actions to attain an HSE credential could include these:
  - Take an HSE practice test to determine readiness to take the subject tests.

Text Messaging Implementation Tool

Section I. Prepare Staff to Compose Text Messages to Support Learners' Goal Attainment

Implementation Steps (*cont.*):

B. Discuss the types of activities, if any, that staff might need to take to support learners' actions to achieve their goals. See the *Text Messaging Planning Form*.

C. Discuss the types of text messages that staff might send to learners to support their attainment of goals. See *Typology of Text Messages* (Exhibit 4); *Text Message Planning Form*; *Compendium of Text Messages*.

D. Discuss which staff can complete the *Text Message Planning Form* for learners' goals that are the focus for the program's use of text messaging.

- – Take the HSE subject tests.
- – Participate in tutoring or a class to attain knowledge needed to retake a subject test.
- – Retake the subject test.

- Discuss with other staff the possible types of activities to support learners' actions to achieve their goals and the types of coordination and information sharing among staff that are needed to support these activities. For example, staff would check whether learners had passed the HSE practice test before encouraging them to take an HSE subject test.

- Review the *Typology of Text Messages* (Exhibit 4) and the *TBCAE Compendium of Text Messages* (Appendix J) and discuss with other staff the types of text messages that staff could send to learners to support the actions that learners will take to attain their goals.

- Review the *Tips for Beginning Text Messaging* shown in Exhibit 5. These tips are helpful for AE staff to keep in mind when sending text messages to learners.

Preparing to send messages to AE learners can be a collaborative effort in which staff think about ways to anticipate what assistance and information learners may need, so that text messaging goes beyond nudging learners to nurturing learners as they pursue their goals.

> "I probably tend to be less formal when I text. But I use spelling and punctuation in text messaging to reflect formality without being too formal and set a good example for the students. I would like to encourage our students to be more professional in their communication because at one point they will need to communicate with employers and professors."
>
> **—AE Program Staff**

Actions for AE Program Staff:

- ☐ Discuss and carry out text messaging planning activities.
- ☐ Refer to the *Text Messaging Implementation Tool* (Appendix C) and complete Section I.
- ☐ Refer to the *Text Message Planning Form* (Appendix D).
- ☐ Refer to the *TBCAE Compendium of Text Messages* (Appendix J).
- ☐ Refer to the *Tips for Beginning Text Messaging* (Exhibit 5).

Tools and Form:

- *Program Planning Tool* (Appendix A)
- *Text Messaging Implementation Tool* (Appendix C)
- *Text Message Planning Form* (Appendix D)

Exhibit 5. Tips for Beginning Text Messaging

- **Keep messages short.** Although staff should model professional communication with learners (e.g., use of correct grammar and punctuation), text messages are generally informal, short, and to-the-point. If a message requires a lot of text, staff may want to send the message using a different form of communication (e.g., email or phone call) and use the text message to ask learners to check their email or schedule a phone call.

- **Maintain a positive tone.** Before pressing "send" on a text message to learners, staff may want to check that the message signals a positive tone. Even if the purpose of the text message is to remind learners of an action they have yet to take or an assignment they have yet to complete, staff will want to end the text message on a positive note.

- **Send an introductory text message to learners.** Staff will want to send an individual text message welcoming each learner to the AE program and encourage learners to respond to the text messages. For example:

  Hello (name of learner), Welcome to (name of AE program). I'm (staff name) and I will be sending you texts to assist you with your progress in the program. You can use this number to reach out to me with questions. (staff name)

- **End each text message with a specific request.** Learners are busy juggling work, family, and classes. Therefore, each text message should have a specific purpose whether it is to build rapport by checking in with them, reminding learners about upcoming meetings or appointments, sharing a program announcement, or requesting a specific action for them to complete. Although text messages without a targeted request may be read by learners, they may not respond to the text if a response is not required.

- **Sign one's name at the end of each text message.** If multiple staff are text messaging learners using the same phone number, staff will want to sign their name at the end of the text message to signal to learners which program staff member is sending the text message.

- **Set aside time to check and respond to learner text messages.** Staff will want to schedule consistent times throughout the day or week to check and respond to learners' text messages. Staff can use this time to be proactive in following up with learners who have not responded to specific requests in prior text messages.

Sample Text Conversation

AE Instructor (3/15, 1:26 PM):
Hi, this is Luis from NextDoorABE. When I get your test scores, can I send them to this number?

Learner (3/15, 1:42 PM):
Yes

AE Instructor (3/15, 2:52 PM):
You have passed everything so far! Just waiting on the writing score.

Learner (3/15, 2:52 PM):
Thank you! If I think I did all right on the question part but then completely bombed the prompt, do you think I can still pass?

AE Instructor (3/15, 2:55 PM):
How much did you write?

Learner (3/15, 2:58 PM):
A paragraph. I know an essay is more than a paragraph now but at the time I thought I just had to write a paragraph.

Learner (3/15, 3:07 PM):
And if I passed everything else, does that mean I have to redo it if I fail writing?

AE Instructor (3/16, 10:14 AM):
You would only have to redo writing. We can meet to work on essay writing.

AE Instructor (3/16, 12:34 PM):
You passed everything! Congrats! Were you interested in any of the job trainings or college?

Learner (3/16, 12:40 PM):
Most likely the CNA. Just have to know more about it.

AE Instructor (3/16, 12:56 PM):
Please call the office to get your name on the list for CNA.

2. Prepare Staff to Send Text Messages

After an AE program director and staff determine whether staff will use an online text messaging platform or a text messaging tool, the next step is to prepare staff to use either the text messaging platform or the tool.

For programs using a *text messaging platform*, these activities include deciding who will train the staff, the materials to be used in that training, and whether the program will provide ongoing support and train new staff as they begin text messaging. Some text messaging platform providers offer virtual training or have recorded training sessions on how to navigate their platform; all platform providers have written directions. After conducting the first training, AE programs want to consider whether that training was sufficient to enable staff to use the text messaging platform with ease and whether some form of ongoing support might be helpful or necessary.

AE programs using a text messaging tool, such as WhatsApp, Facebook Messenger, an AE program-sponsored mobile phone, or Google applications such as Google Classroom and Voice, will need to decide whether all staff must use the same tool or whether staff will have flexibility in choosing which tool to use. If staff can choose their own tool, the AE program might want to determine what minimum capabilities are desirable.

> ***Text Messaging Implementation Tool***
>
> **Section II. Prepare Staff to Send Text Messages**
>
> **Implementation Steps:**
>
> **A1.** *For use of a text messaging platform*: Discuss the training that will be provided to staff on how to use the text messaging platform.
> - Who will train the staff?
> - What materials will be used to train staff (e.g., provider's recorded training or reference handbook)?
> - Will ongoing support or training for new staff be provided after the initial training?
>
> OR
>
> **A2.** *For use of another tool*: Discuss the guidelines that staff will need about using the tool based on its features.

Actions for AE Program Staff:

☐ Discuss a plan for training and supporting staff in using a text messaging platform or tool.

☐ Refer to the *Text Messaging Implementation Tool* (Appendix C) and complete Section II.

Tool:

- *Text Messaging Implementation Tool* (Appendix C)

3. Prepare Guidelines for Staff's Use of Text Messaging with Learners

The next step in implementing text messaging with AE learners is to set guidelines for how staff will use text messaging:

- How frequently should staff initiate sending text messages to learners?

- How often should staff check the text messaging platform or tool for messages from learners?

- How soon should staff respond to learners' text messages during the program's hours of operation, and after those hours?

- How can the program ensure that learners' text messages are addressed when staff are not available for an extended period of time?

AE staff participating in the TBCAE project found that an effective way to engage individual learners was to initiate text messages regularly. Those text messages asked learners questions about their progress or if they needed assistance; messages also made suggestions regarding their work. Although learners did not always respond to text messages from staff, staff reported that because a learner did not respond did not necessarily indicate the learner did not act on the suggestions or information that staff provided. In reflecting on their use of text messaging, AE staff in the TBCAE project noted that it can be helpful to set a schedule to ensure that staff are initiating text messages regularly to reinforce their availability to assist learners. The frequency of initiating text messages will depend on what goals are being supported with the text messages and the timeframe during which learners are participating in the program.

AE programs using a text messaging platform that does not have an automatic message notification feature might want to set a schedule for how frequently staff will check the platform for messages from learners. The schedule could help ensure that staff are responsive in addressing learners' needs as communicated in the messages.

Another consideration related to responsiveness to learners' text messages is how quickly staff respond to the messages, particularly those that arrive outside of the AE program's hours of operation. Learners might send staff text messages at night and on weekends, and AE programs might consider setting guidelines about staff responding, such as by noon the day after the message is received. The program can communicate the guidelines to learners, so both staff and learners have the same expectations for a response.

Text Messaging Implementation Tool

Section III. Prepare Guidelines for Staff's Use of Text Messaging with Learners

Implementation Steps:

A1. Discuss possible guidance to provide to staff on their use of text messaging:

- A schedule for how often staff should send a new text message.

- How frequently staff should check the text messaging platform or tool for text messages from learners.

- A timeframe within which staff should respond to text messages from learners during and after the program's hours of operation.

A2. Discuss procedures for ensuring that learners' text messages receive a timely reply when staff are not available for an extended period (e.g., on vacation, sick leave).

"I set the expectation that staff did not have to work late at night and on vacation. And then when they get back, they should respond to students in the order of receipt. And be clear with students what your hours are so that [they know you will] respond during this time."

—AE Program Director

A final topic related to staff's responsiveness to learners is making sure that learners' text messages are addressed when recipient staff are not available for an extended period. Programs using a text messaging platform or tool that can be accessed by multiple staff could identify alternate staff to respond during that period. Programs using text messaging platforms with an out-of-office feature could provide guidance about when and how to use it. The goal is to ensure that learners are provided an appropriate response to their messages within a reasonable timeframe. (See the *Checklist for Preparing Staff to Use Text Messaging* in Appendix E.)

> "I think that folks should carve out time each day to check the platform and text students – to routinize the practice. Everyone in the program should be made aware of the text messaging. And then the staff can talk to each other about how they are using it and help one another."
>
> **—AE Program Staff**

Actions for AE Program Staff:

☐ Discuss and set guidelines for sending and responding to learners' text messages.

☐ Refer to the *Text Messaging Implementation Tool* (Appendix C) and complete Section III.

☐ Refer to the *Checklist for Preparing Staff to Use Text Messaging* (Appendix E).

Tool and Checklist:

- *Text Messaging Implementation Tool* (Appendix C)
- *Checklist for Preparing Staff to Use Text Messaging* (Appendix E)
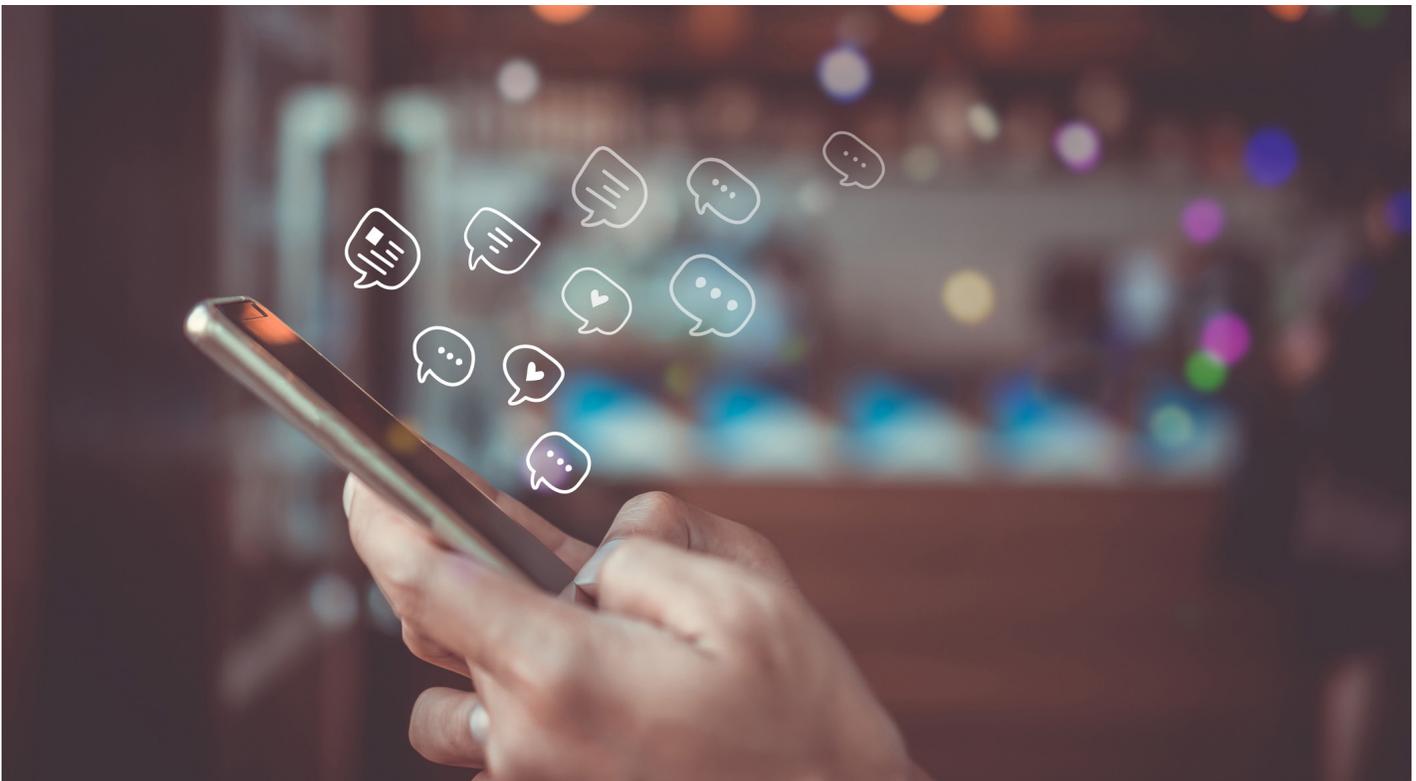
4. Develop Learner Recruitment and Orientation Processes

After AE staff are prepared to use a text messaging platform or tool and have guidelines for the timeframes in which to send messages to learners and respond to their messages, they are ready to recruit and orient learners to use text messaging as part of their participation in the AE program.

Recruiting Learners to Participate in Text Messaging
The first step in recruitment is to determine which learners in the group that the program has targeted for text messaging are willing to communicate with staff using their mobile phones. Staff can ask learners about their willingness to participate in text messaging during the program's intake process or when learners are placed in instruction. If staff recruit learners during intake, they can begin sending text messages to learners immediately so that learners become engaged in the program from the start. Staff can use the *Learner Communication Preference Form* (Appendix F) to gather information about learners' preferences to communicate by text message and other vehicles.

Staff who recruit learners want to explain that they will send learners individualized text messages that are personalized to their goals for participating in the program. Staff can tell learners that the text messages are intended to help keep them on track in their AE activities and provide them with assistance and information that can help them achieve their goals. Based on learners' goals, staff could provide examples of the types of questions that learners might ask using text messages and the types of information that staff can provide through text messaging.

One consideration for learners is their type of mobile phone plans. Some learners will have unlimited data plans and text messaging capabilities, whereas others will have limited data or prepaid plans or plans that charge for each text message they send and receive. The type of mobile phone plans a learner has could influence whether they are willing to participate in text messaging.

Orientating Learners to Text Messaging
Once learners have agreed to participate in text messaging, staff can orient them to the program's text messaging process. If feasible, the staff members who will be exchanging text messages with learners can meet with them individually to begin to develop a relationship. During the orientation, it is important to:

- **Provide learners with the timeframe for staff responding to text messages.** Learners sending text messages might expect

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Text Messaging Implementation Tool

Section IV. Develop Learner Recruitment and Orientation Processes

Implementation Steps:

A1. Discuss the process for identifying learners who are willing to participate in text messaging.

- Decide when learners will be asked about their preferred modes of being contacted by staff to identify those willing to use text messaging (e.g., during intake). The *Learner Communication Preference Form* can be used during intake.

- Decide when learners who use text messaging will be asked to engage with staff using this communication mode to support their progress.

A2. Discuss the approach to orienting learners to using text messaging to engage with staff about their progress. See the *Checklist for Orienting Learners to Text Messaging*.

"Quite a few of the students in distance learning with all the prompting were able to march at graduation last week. The text messaging had a role, absolutely, because without all the nudges and reminders, they didn't feel motivated. They would tell me, 'You were on me so much, I felt like I had to do this.' They felt like they needed to do it. It was positive pressure."

—AE Program Staff

staff to respond as soon as a text message is received, regardless of the time of day. In explaining the AE program's use of text messaging, it is important to set learners' expectations about the days and times that staff will respond to their text messages, so learners understand that if they send a text message outside of those hours, they may not receive an immediate response.

- **Remind learners to update staff if their mobile phone number or contact information changes.** Learners' mobile phone numbers may change frequently during their participation in the AE program. To avoid any "downtime" in text messaging, staff can remind learners to update them if their phone number changes.

- **Explain the technical requirements.** For AE programs using a text messaging platform, the technical requirements will vary depending on the platform the program is using. For example, if the platform offers a mobile app, learners will need a smartphone and internet or data plan to send and receive messages. If the platform sends messages directly as a standard text message, a smartphone is not required, but text messaging rates may apply. If the costs to learners are a financial hardship, staff will want to explain that learners can opt out of (and back in) text messaging at any time.

- **Practice text messaging with learners with an initial text.** During orientation, staff will want to practice sending one or two text messages to learners and have them respond. This way staff can confirm that they have the learners' correct mobile phone numbers; learners can identify and save the program's or the staff member's phone number in their phone; and the habit of staff and learners communicating by text messaging can begin to form.

See the *Checklist for Orienting Learners to Text Messaging* (Appendix G) to use in conducting the orientation.

Sample Text Conversation

Learner (1/9, 10:17 AM):
I keep getting emails saying my tuition is due and to sign up for the payment plan. I thought the scholarship paid for that?

AE Staff (1/9, 11:00 AM):
You have filled out the FAFSA and Scholarship form, correct?

Learner (1/9, 11:01 AM):
Yes

AE Staff (1/9, 11:08 AM):
So, I just looked up all the students in the program and no one is showing financial aid yet. I can confirm with someone in the Business and Financial Aid Office that this is ok. I will keep you posted.

Learner (1/9, 11:09 AM):
Okay thank you!

Learner (1/11, 9:48 AM):
I received an email and it processed!!

AE Staff (1/11, 10:13 AM):
Great! Thank you for having such great follow through. You are helping me keep all students on track.

Actions for AE Program Staff:

☐ Discuss and begin recruiting and orientating learners to the AE program's text messaging process.

☐ Refer to the *Text Messaging Implementation Tool* (Appendix C) and complete Section IV.

☐ Refer to the *Learner Communication Preference Form* (Appendix F).

☐ Refer to the *Checklist for Orienting Learners to Text Messaging* (Appendix G).

Tool, Form, and Checklist:

- *Text Messaging Implementation Tool* (Appendix C)

- *Learner Communication Preference Form* (Appendix F)

- *Checklist for Orienting Learners to Text Messaging* (Appendix G)

5. Conduct Survey of Learners on Utility of Text Messages

One activity that AE programs might consider as learners complete their text messaging with AE staff is to send learners a text message-based follow-up survey asking a few questions about the experience. A survey is an opportunity to gather learners' perceptions about whether the program's use of text messaging was helpful, and if so, in what ways. The survey also lets learners provide feedback on how the text messaging could have been more helpful to them. The AE program can use the results from the survey to enhance its text messaging processes.

The *Sample Text Messages to Obtain Learner Feedback on Using Text Messaging* (Appendix H) provides a sample survey that staff might send to learners. The survey can be sent as a text message for direct feedback or the text message can provide a link to an online survey for anonymous feedback.

The AE programs in the TBCAE project found that learners are more likely to respond to a survey if they received it before they left the program.

> ### *Text Messaging Implementation Tool*
>
> **Section V. Conduct Survey of Learners on the Utility of Text Messages**
>
> **Implementation Steps:**
>
> Discuss the use of a follow-up survey of learners to assess whether learners perceive that the text messages have helped them in attaining their goals. See *Sample Text Messages to Obtain Learner Feedback on Using Text Messaging*.

Actions for AE Program Staff:

☐ Discuss and list the questions that the AE program will include in its follow-up survey of learners.

☐ Refer to the *Text Messaging Implementation Tool* (Appendix C) and complete Section V.

☐ Refer to the *Sample Text Messages to Obtain Learner Feedback on Using Text Messaging* (Appendix H).

Tool:

• *Text Messaging Implementation Tool* (Appendix C)

• *Sample Text Messages to Obtain Learner Feedback on Using Text Messaging* (Appendix H)

6. Track the Frequency and Topics of Text Messages

An important activity in an AE program's implementation of text messaging is for the program director and staff to review the text messages sent to and received from learners. The review will identify the range of questions that learners have or issues that they encounter in participating in the AE program. These data can help determine what types of new information or processes a program might need to add to facilitate its learners' participation and success.

The review of text messages can also provide insights about learners' goal attainment process. Text messages are aimed at helping AE learners achieve their goals for participation in AE. The TBCAE project found that text messages moved learners toward their goals in the form of action steps that learners took in response to the text messages they received. Those action steps can be considered *interim outcomes* from the use of text messaging. For example, a text message that prompts a learner to participate in career awareness activities to explore possible next steps after completing the AE program contributes to the interim outcome of determining a feasible career path. Likewise, passing HSE subject tests moves a learner a step closer to attaining an HSE credential. Knowing the type (e.g., personal support, academic activities) and topics of the text messages staff and learners exchanged provides information about how text messages contribute incrementally to learners' overall success.

For this step, AE staff will want to use the *Text Message Tracking Form* (Appendix I) monthly to document the type and topics of the text messages they sent to and received from learners. Then the program can aggregate the information collected on the forms to identify patterns of issues that arise, new challenges that learners encounter, and steps that learners take as they move forward toward attaining their goals.

> ***Text Messaging Implementation Tool***
>
> **Section VI. Track Frequency and Topics of Text Messages**
>
> **Implementation Steps:**
>
> Discuss the ways in which the *Text Message Tracking Form* can be used by staff to identify new challenges that learners have and the types of information that learners are requesting.
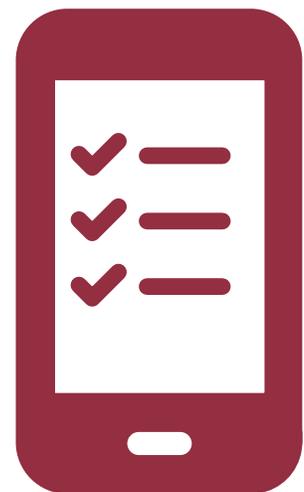
Actions for AE Program Staff:

☐ Discuss and list the process that the AE program will use to complete the *Text Message Tracking Form* (Appendix I) and review the information collected.

☐ Refer to the *Text Messaging Implementation Tool* (Appendix C) and complete Section VI.

☐ Refer to the *Text Message Tracking Form* (Appendix I).

Tool and Form:

• *Text Messaging Implementation Tool* (Appendix C)

• *Text Message Tracking Form* (Appendix I)

IV. Adult Education State Leadership Support for the Use of Text Messaging

AE state leadership can play a vital role in supporting an intentional approach to AE programs' use of individualized and personalized text messaging to facilitate AE learners' attainment of their goals. State leadership can encourage AE program staff's use of the *TBCAE Toolkit* to plan their text messaging activities or can include support of AE programs' use of text messaging as part of the activities a state's AE professional development provider conducts.

The types of state assistance and support that could contribute to AE programs' successful implementation of text messaging are:

- Ensure that AE program staff have access to their NRS and HSE data so that they can review the data to identify populations of learners who, from year to year, are consistent in not making progress; the percentages of learners who begin but do not complete their HSE; and other relevant comparisons based on program data.

- Provide professional development to support the use of the *TBCAE Toolkit*'s Planning and Implementation Tools.

- Facilitate or support a learning community that staff from AE programs using text messaging can join to share approaches and experiences in using text messaging proactively and productively. Document the lessons learned that are discussed during the learning community meetings.

- Facilitate AE programs' use of an online text messaging platform so that AE program staff can use a platform to send text messages.

State leadership can also encourage AE program directors and staff to:

- Work together to use the *Program Planning Tool* (Appendix A) to identify the types of learners' goals that will be supported by text messaging, the population of learners who will be recruited to participate, the types of staff who will send text messages (advisors/navigators/career coaches or instructors), and the platform or tool that will be used to send text messages.

- Work together to use the *Text Messaging Implementation Tool* (Appendix C) to analyze learners' actions and timelines for accomplishing their goals, and the challenges that AE staff anticipate that learners will have in carrying out those actions so that staff can identify the types of text messages that they can send proactively to support learners' success.

> "The best part is the quick response. If I called, I would get voicemail. If I emailed, they wouldn't respond. But if I texted, they would respond. The other good part is that I could remind them of scheduled meetings. The students that really participate have their phone in their hands or back pocket so it was always right there. It was a quick way for me to check in and get responses back."
>
> **—AE Program Staff**

- Send the short follow-up survey in the *TBCAE Toolkit* to learners as they leave an AE program to collect information about their perceptions of the utility of text messaging.

- Collect data about the frequency and topics of text messages using the *Text Message Tracking Form* (Appendix I) to identify the patterns of issues that arise that can inform AE program improvement.

AE state leadership's recommendation to AE programs to consider text messaging as an integral part of their support for AE learners' success can help programs expand their capacity to prompt and assist learners in working toward their goals. The *TBCAE Toolkit* can play an important role in facilitating AE programs staff's use of text messaging as part of their enhanced support to learners.
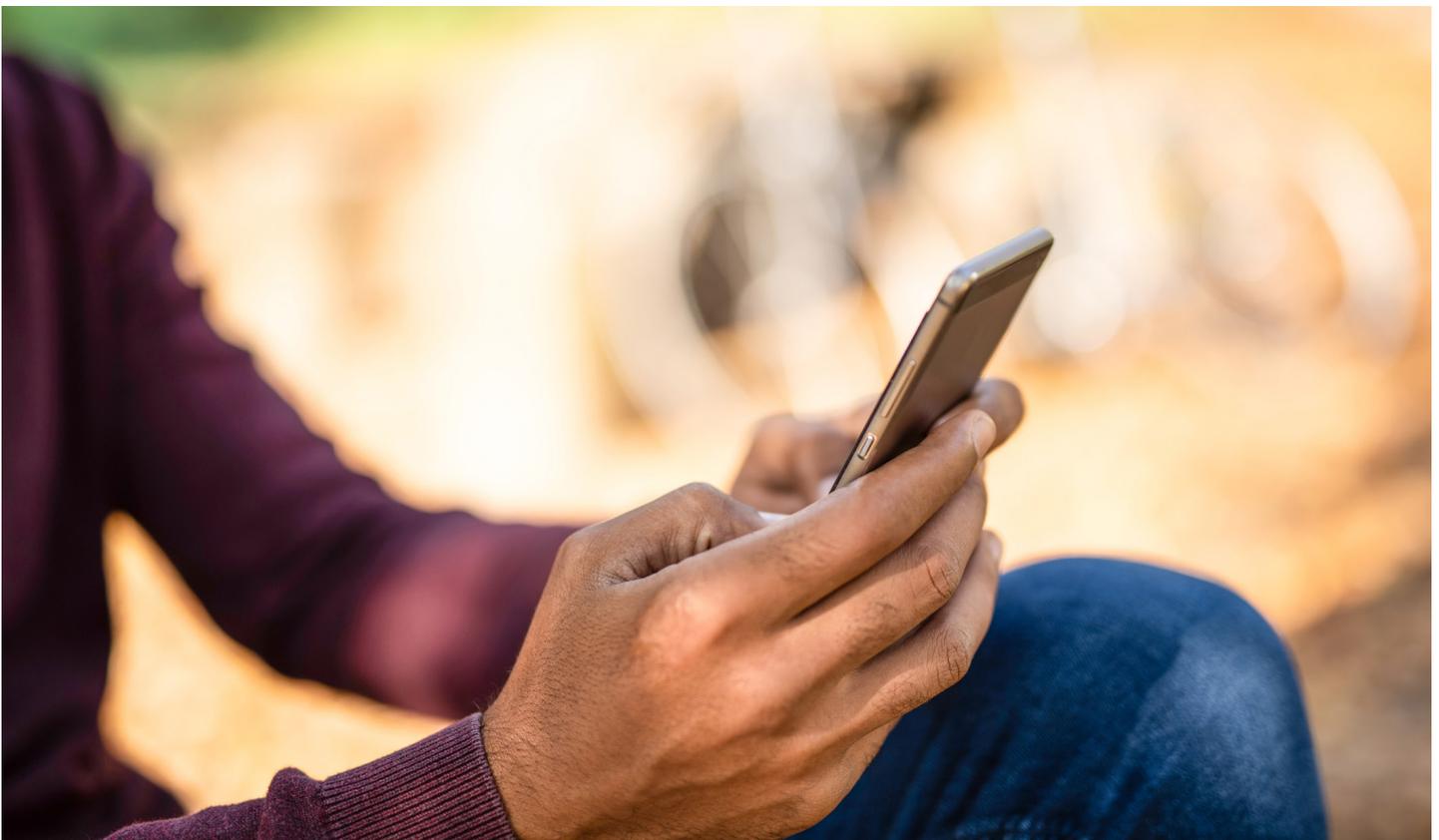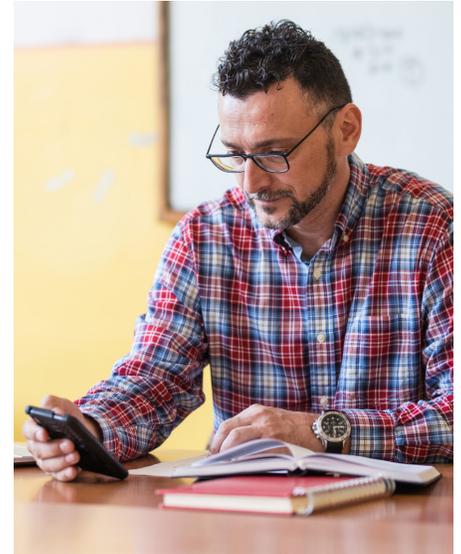
V. Conclusion

The *TBCAE Toolkit* can guide AE administrators and staff in implementing individualized and group text messaging that helps AE learners engage in their studies, address challenges that occur, and accomplish their goals to move forward in their lives. Well-implemented text messaging can be an efficient and cost-effective means of communicating with AE learners that goes beyond the process of nudging to provide learners with the coaching and feedback they need to increase their knowledge and skills, earn a secondary credential, and begin a career pathway through further education and employment.

The TBCAE project demonstrated that the combination of strong local AE program leadership and AE state leadership support can engage AE staff in using text messaging to help AE learners persist as they move incrementally to attain their goals. Text messaging can contribute to learners' success by supporting them in taking the small steps that lead to the outcomes that learners strive to accomplish and can be an instrumental part of AE learners' participation in adult education. We hope that adult educators will find the *TBCAE Toolkit* helpful in planning and using text messaging as part of their work is supporting AE learners' success.
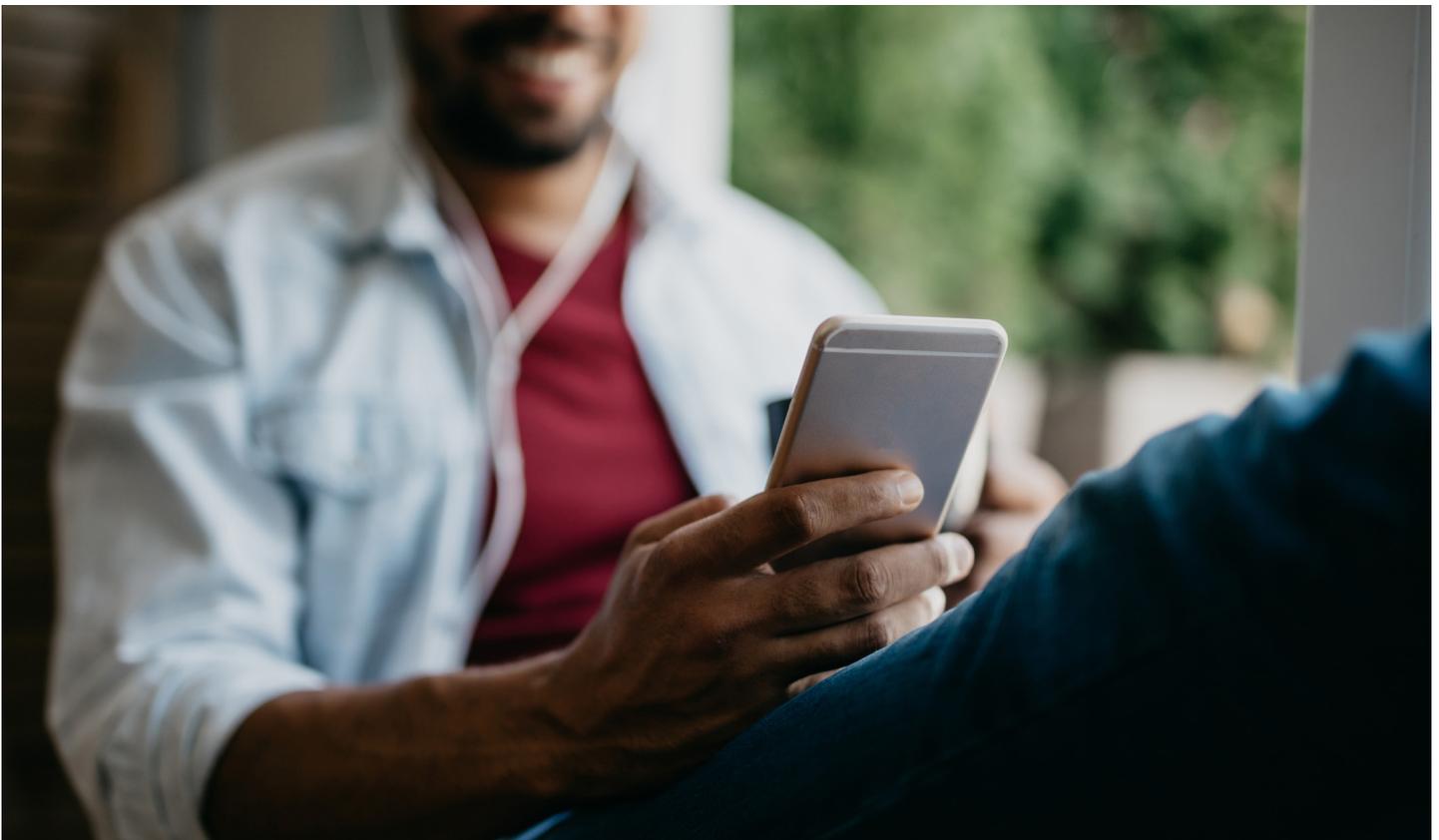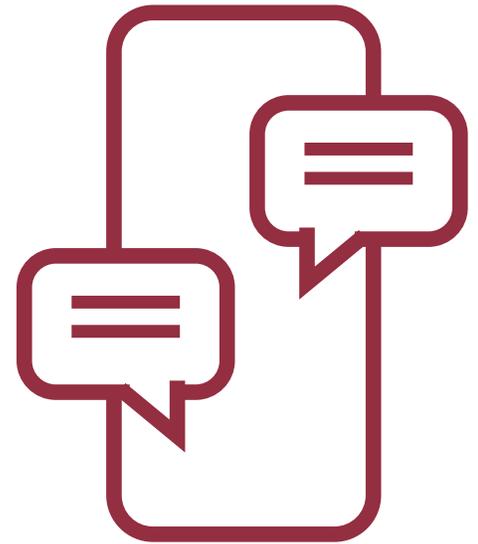
Appendices

Tools, Checklists, Forms, and Resources

Appendix A: Program Planning Tool

Directions: The *Program Planning Tool* can assist adult education (AE) program directors and staff in developing a plan for implementing text messaging with AE learners. The *Program Planning Tool* has four planning steps. The activities that staff should conduct to complete each planning step are listed in Column 1, "Planning Steps." In Column 2, "Adult Education Program Plan," staff list their conclusions based on the information they reviewed or discussed in conducting the activities in Column 1. Staff should record their decision for each planning step in Column 2.

I. Specify Goals for Use of Text Messaging with Learners	
1 **Planning Steps**	**2** **Adult Education Program Plan** *Program staff complete this column.*

A. Review learners' outcome data in your program's most recent NRS tables. Check the learner outcomes below that did not meet your program's performance targets or that are an area of concern for reasons other than performance.
  ☐ Attendance
  ☐ Skill gains
  ☐ High school equivalency completion
  ☐ Postsecondary enrollment
  ☐ Progress in IET/workplace programs
  ☐ Job placement or advancement
	List the learners' outcomes that are the priorities for improvement.

B. Discuss areas of learners' participation that could be better supported (e.g., persistence, access to supportive services).	List the areas in which learners could benefit from increased support or assistance.
C. Review the results from Activity A and Activity B above to determine which goals staff can support by using text messaging. Identify one or two goals that could be tracked in the near-term (e.g., a semester, a term, one program year).	List the goals for using text messaging.

Appendix A: Program Planning Tool

II. Identify Populations of Learners Who Will Be Sent Text Messages

1 **Planning Steps**	2 **Adult Education Program Plan** *Program staff complete this column.*
Based on the goals for using text messaging from Section I: Activity C, identify the group(s) of learners who could benefit from receiving text messages (e.g., learners preparing for the HSE test).	List the group(s) of learners who could benefit from receiving text messages.

III. Identify the Staff Who Will Send Text Messages to Learners

1 **Planning Steps**	2 **Adult Education Program Plan** *Program staff complete this column.*
A. Based on the goals for using text messaging and the targeted learner group(s) from Sections I and II, discuss which staff will send individualized text messages to help learners achieve their goals. ☐ Advisor/Coach/Career Navigator ☐ Instructor ☐ Other (specify)	List the staff who will be responsible for sending individualized text messages to help learners achieve their goals.
B. Discuss whether group text messages about the program's administrative operations (e.g., program closures) will be sent by one designated staff person. ☐ Advisor/Coach/Career Navigator ☐ Instructor ☐ Administrative staff ☐ Other (specify)	List the staff who will be responsible for sending group text messages about administrative issues.

IV. Determine the Options for Sending Text Messages to Learners	
1 **Planning Steps**	**2** **AE Program Plan** *Program staff complete this column.*
A1. Discuss whether staff are currently sending text messages to AE learners. ☐ Yes ☐ No A2. If yes, identify the text messaging tools or platforms that staff are using to communicate with learners, then skip to B2.	List the text messaging tools or platforms that staff **are currently using** to communicate with learners.
B1. If staff are not using a text messaging tool with learners OR are not using an online text messaging platform (e.g., Signal Vine, Remind), determine whether the program currently has access to or could access a text messaging platform that staff could use to communicate with learners.	If staff are not currently using a text messaging tool or platform, indicate whether the program can access a tool or platform to communicate with learners.
B2. If the program is considering using a text messaging platform, review the *Checklist of Text Messaging Platform Features*: – Discuss the program's high-priority features for a text messaging platform. – Compare possible text messaging platforms on these features. – Select the text messaging platform that best meets the program's criteria for features.	List the text messaging platform that staff will use to communicate with learners.
B3. OR—If the program will not use a text messaging platform, discuss the minimum features of the tool that staff will use to communicate with learners, such as one of the following: ☐ WhatsApp ☐ Facebook Messenger ☐ Google applications (e.g., Google Classroom, Google Voice) ☐ Other (specify)	OR—List the tool that staff will use to communicate with learners.

Appendix B: Checklist of Text Messaging Platform Features

Directions: The *Checklist of Text Messaging Platform Features* can assist adult education (AE) program directors, staff, and state leadership in determining the characteristics of online text messaging platforms and which platform best meets the AE program's needs.

Column 1, "Text Messaging Platform Features," lists the basic and advanced features to consider in selecting a text messaging platform. The features are listed as questions for staff to ask the platform providers. Column 2, "Information about Text Messaging Platform Providers," provides space for staff to compare up to three providers on the features of their text messaging platforms to determine which text messaging platform the AE program will use.

1 Text Messaging Platform Features	2 Information about Text Messaging Platform Providers		
Basic Features Does the text messaging platform…			
Provide a dedicated phone number for text messaging?	Yes • No	Yes • No	Yes • No
Allow staff to send and receive text messages?	Yes • No	Yes • No	Yes • No
Store the conversation string between staff and learners?	Yes • No	Yes • No	Yes • No
Allow staff to organize learners in different groups or classes?	Yes • No	Yes • No	Yes • No
Allow staff to send group text messages?	Yes • No	Yes • No	Yes • No
Allow staff to easily add learners and update learner information (i.e., mobile phone numbers)?	Yes • No	Yes • No	Yes • No
Provide staff with individual login accounts: Is the platform secure and password-protected? Does it enable staff to have individual login accounts?	Yes • No	Yes • No	Yes • No
Allow staff to access the platform on a mobile device?	Yes • No	Yes • No	Yes • No
Send staff an immediate notification when a learner sends a message?	Yes • No	Yes • No	Yes • No
Advanced Features Does the text messaging platform…			
Allow the text message data to be exported?	Yes • No	Yes • No	Yes • No
Send an automated out-of-office response?	Yes • No	Yes • No	Yes • No
Allow staff to send pictures or videos?	Yes • No	Yes • No	Yes • No
Allow staff to pre-schedule text messages?	Yes • No	Yes • No	Yes • No
Display real-time engagement metrics?	Yes • No	Yes • No	Yes • No
Receive phone calls?	Yes • No	Yes • No	Yes • No
Integrate with other platforms or data streams?	Yes • No	Yes • No	Yes • No
Other:	Yes • No	Yes • No	Yes • No
Other:	Yes • No	Yes • No	Yes • No
Other:	Yes • No	Yes • No	Yes • No

Appendix C: Text Messaging Implementation Tool

Directions: The *Text Messaging Implementation Tool* can assist AE program directors and staff in using text messaging with AE learners. The tool has six implementation steps. Column 1, "Implementation Steps," lists the activities that staff should conduct to complete each implementation step. The "Implementation Plan" in Column 2 provides space for staff to list their conclusions based on the information they reviewed or discussed in conducting the activities in Column 1. Staff should also use Column 2 to record their decision for each implementation step.

I. Prepare Staff to Compose Text Messages that Support Learners' Goal Attainment	
1 **Implementation Steps**	**2** **Implementation Plan** *Program staff complete this column.*
A1. Review learners' goals that the program will support through text messaging. See the *Program Planning Tool*.	List learners' goal(s) that staff will support through text messaging.

A2. Discuss the actions learners will take to attain each of their goals (e.g., actions associated with attaining a High School Equivalency (HSE) credential; actions associated with transitioning to postsecondary education; actions to enhance their reading, writing, and math skills). See the *Text Message Planning Form*.
 	
For example, learners' actions to attain an HSE could be:
 	
  – Take an HSE practice test to determine readiness to take the subject tests.
  – Take the HSE subject tests.
  – Participate in tutoring to address gaps in knowledge needed to retake a subject test.
	List the key actions that learners will take to achieve the goal(s) listed above.

B. Discuss the types of activities, if any, that staff might need to take to support learners' actions to achieve their goals. See the *Text Messaging Planning Form*. For example, staff would check whether learners had passed the HSE practice test before encouraging them to take an HSE subject test.	List examples of activities staff could take to support learners' actions to achieve the goal(s) listed above (e.g., reviewing data, checking with other staff).

C. Discuss the types of text messages that staff might send to learners to support their attainment of goals. See *Typology of Text Messages* (Exhibit 4); *Text Message Planning Form; Compendium of Text Messages*.	List examples of the text messages that staff could send to support learners' attainment of their goals that are the focus of the text messaging.
D. Discuss which staff can complete the *Text Message Planning Form* for learners' goals that are the focus for the program's use of text messaging.	List the staff who will be responsible for completing a draft of the *Text Message Planning Form*. List the staff who will review the draft set of text messages. Describe the process for maintaining the master list of text messages related to learners' goals.

II. Prepare Staff to Send Text Messages	
1 **Implementation Steps**	**2** **Implementation Plan** *Program staff complete this column.*

A1. For use of a *text messaging platform*: Discuss the training that will be provided to staff on how to use the text messaging platform.
 	
   – Who will train the staff?
 	
   – What materials will be used to train staff (e.g., provider's recorded training or reference handbook)?
 	
   – Will ongoing support or training for new staff be provided after the initial training?
 	
OR
	List who will train staff about how to use the text messaging platform.
	
	List the materials that will be used to train staff.
	
	Specify whether ongoing support or training sessions for new staff will be provided after the initial training.

A2. *For use of another tool*: Discuss the guidelines that staff will need about using the tool based on its features.	List the guidelines for staff regarding their use of the tool to conduct text messaging.

Appendix C: Text Messaging Implementation Tool

III. Prepare Guidelines for Staff's Use of Text Messaging with Learners	
1 **Implementation Steps**	**2** **Implementation Plan** *Program staff complete this column.*

A1. Discuss possible guidance to provide to staff on their use of text messaging:
 	
  – A schedule for how often staff should send a new text message.
 	
  – How frequently staff should check the text messaging platform or tool for text messages from learners.
 	
  – A timeframe within which staff should respond to text messages from learners during and after the program's hours of operation.
	List the guidance that will be provided to staff on:
	
	  – Frequency for sending a new text message to learners:
	
	  – Frequency for checking the text messaging platform for learners' messages (if relevant):
	
	  – Timeframe for responding to learners' text messages:
	    ○ During program's hours of operation
	
	    ○ Outside of program's hours of operation

A2. Discuss procedures for ensuring that learners' text messages receive a timely reply when staff are not available for an extended period (e.g., on vacation, sick leave).	List the procedures for alternate staff to check and respond to learners' text messages. If the text messaging platform will be used and provides an automated out-of-office feature, list the circumstances under which staff should use it.

IV. Develop Learner Recruitment and Orientation Processes

1 Implementation Steps	2 Implementation Plan *Program staff complete this column.*

A1. Discuss the process for identifying learners who are willing to participate in text messaging.
 	
  – Decide when learners will be asked about their preferred modes of being contacted by staff to identify those willing to use text messaging (e.g., during intake). The *Learner Communication Preference Form* can be used during intake.
 	
  – Decide when learners who use text messaging will be asked to engage with staff using this communication mode to support their progress.
	List the process that will be used to determine learners' preferred mode(s) of communication with staff.
	
	List the process that will be used to recruit learners to agree to use text messaging to engage with staff about their participation in the program.
	
	List the process that staff will use to recruit learners to engage in text messaging with them.

A2. Discuss the approach to orienting learners to using text messaging to engage with staff about their progress. See the *Checklist for Orienting Learners to Text Messaging*.	List the process that staff will use to orient learners to using text messaging.

V. Conduct Survey of Learners on the Utility of Text Messages

1 Implementation Steps	2 Implementation Plan *Program staff complete this column.*
Discuss the use of a follow-up survey of learners to assess whether learners perceive that the text messages have helped them in attaining their goals. See *Sample Text Messages to Obtain Learner Feedback on Using Text Messaging*.	List questions that will be asked on the Learner Survey.

VI. Track Frequency and Topics of Text Messages

1 Implementation Steps	2 Implementation Plan *Program staff complete this column.*
Discuss the ways in which the *Text Message Tracking Form* can be used by staff to identify new challenges that learners have and the types of information that learners are requesting.	List the process the AE program will use to complete the *Text Message Tracking Form*; review the information collected.

Appendix D: Text Message Planning Form

Directions: The *Text Message Planning Form* can assist AE staff in writing individualized, personalized text messages to learners to help them achieve their goals for participating in the AE program. AE staff can use this form as they begin to implement text messaging to plan the types of text messages they will send learners based on learners' goals and the program's experience in helping learners achieve their goals or address challenges to achieving their goals. As staff progress in working with learners, they can also use the form to plan the text messages they will send to learners as learners encounter new challenges.

Staff can use this form to plan their text messages to each learner based on a learner's individual goals. Staff can also use this form to plan personalized text messages that can been sent individually to multiple learners who have the same goal.

The "Goal" rows are for staff to list the learner's goals that they will support using text messaging. Column 1, "Staff Supportive Activity," is provided for staff to list the activities they will conduct to be able to send text messages that can encourage a learner's achievement of their goals.

For example, as shown for the Sample Goal "Pass the GED® Math Test," one of the first supportive activities a staff member might conduct to support this learner is to check whether the learner has taken and passed the GED Ready® Math Practice Test (entered in Column 1). Column 2, "AE Staff Actions to Support Text Message," is provided for staff to note any actions they need to take before sending a text message about the learner's progress toward achieving this goal. For the example shown, the staff member would first check the learner's score on the GED Ready® Math Practice Test.

In column 3, "Content of Text Message," staff would write a text message that can support the learner's goal. Column 4, "Timeframe for Text Message," is where staff list the timeframe in which the text message should be sent to the learner—an exact date or milestone (e.g., intake, orientation, exam date).

See the *Compendium of Text Messages* for examples of the types of AE learners' goals and supportive text messages related to the goals that can be adapted for use.

Name of Learner:			
1 **Staff Supportive Activity**	**2** **AE Staff Actions to Support Text Message**	**3** **Content of Text Message**	**4** **Timeframe for Text Message**
Sample Goal: Pass the GED® Test			
Sample Activity 1: Determine whether learner is ready to take the GED® Math Test.	Check learner's score on GED Ready® Math Practice Test.	– Tell learner that their score on the GED Ready® Practice Test indicates they are ready to take the GED® Math Test. – Ask learner whether they have signed up to take the GED® Math Test. If not, encourage them to do so by XX date.	By XX date

Appendix D: Text Message Planning Form

Name of Learner:			
1 **Staff Supportive Activity**	**2** **AE Staff Actions to Support Text Message**	**3** **Content of Text Message**	**4** **Timeframe for Text Message**
Sample Goal: Pass the GED® Test			
Sample Activity 2: Determine whether learner took the GED® Math Test; and if so, whether they passed.	Check learner's GED® Math Test information.	– If learner passed the GED® Math Test, congratulate them; ask what their next steps are for taking the remaining tests they need to pass to earn the credential. If they did not pass the GED® Math Test, suggest a next step they could take to prepare to retake the test.	By YY date
Goal 1:			
Goal 2:			

Appendix D: Text Message Planning Form

Name of Learner:			
1 **Staff Supportive Activity**	**2** **AE Staff Actions to Support Text Message**	**3** **Content of Text Message**	**4** **Timeframe for Text Message**
Sample Goal: Pass the GED® Test			
Sample Activity 2: Determine whether learner took the GED® Math Test; and if so, whether they passed.	Check learner's GED® Math Test information.	– If learner passed the GED® Math Test, congratulate them; ask what their next steps are for taking the remaining tests they need to pass to earn the credential. If they did not pass the GED® Math Test, suggest a next step they could take to prepare to retake the test.	By YY date
Goal :			
Goal :			

Directions: The *Checklist for Preparing Staff to Use Text Messaging* can assist AE program directors and staff in orienting and obtaining support from staff for the use of text messaging. Below is a list of information to discuss with AE program staff to facilitate staff's use of individualized and personalized text messages.

- ☐ AE learners' goals that will be supported with text messages

- ☐ AE program's processes for using text messaging

  - ◦ Staff responsible for text messaging

  - ◦ Frequency with which staff will initiate text messages

  - ◦ Expectations for staff to check for and respond to learners' text messages

  - ◦ Process for documenting issues identified in text messages that can suggest a need for program changes or improvements

- ☐ Types of text messages to initiate based on learners' activities related to their goals or learners' anticipated challenges

- ☐ How to use the text messaging platform

- ☐ Schedule for regular check-ins with staff

Appendix F: Learner Communication Preference Form

Directions: The *Learner Communication Preference Form* can assist AE programs in collecting information about AE learners' preferred mode of communication during their participation in the AE program. Below is an example of text that can be adapted and included in the program's learner intake or enrollment form.

There will be times when AE program instructors or staff will need to contact you or when you will need to contact them. For example, staff may need to send you reminders about your class or a meeting, or ask you questions about your progress in the program. You may need to ask your instructor questions about your class.

For #1 below, check your preferred way of being contacted by the AE program. For #2 below, check the next best way for the program to contact you.

1. ***Preferred mode of being contacted***

   ☐ *Phone. Phone number:*_____

   ☐ *Text Message. Phone number:* _____

   ☐ *Email. Email address:* _____

   ☐ *WhatsApp. WhatsApp username:* _____

   ☐ *Facebook Messenger. Facebook username:* _____

   ☐ *Other. Please specify:* _____

2. ***Alternative mode of being contacted***

   ☐ *Phone. Phone number:* _____

   ☐ *Text Message. Phone number:* _____

   ☐ *Email. Email address:* _____

   ☐ *WhatsApp. WhatsApp username:* _____

   ☐ *Facebook Messenger. Facebook username:* _____

   ☐ *Other. Please specify:* _____

Appendix G: Checklist for Orienting Learners to Text Messaging

Directions: The *Checklist for Orientating Learners to Text Messaging* can assist AE program directors and staff in preparing learners to use text messaging to communicate with AE staff. The AE staff who will send text messages to learners will need to orient them about the ways in which the program will use text messaging:

- ☐ Introduce the reasons why staff will send learners text messages (e.g., to remind learners about upcoming activities, send information that can assist them, ask learners questions about their progress in the program) and what types of questions learners can ask staff using text messaging.

- ☐ Provide learners with information about the timeline for text messaging activities:

  - ◦ During what timeframe text messaging will occur

  - ◦ How often staff will send text messages to them

  - ◦ How quickly they can expect staff to respond to their text messages

  - ◦ How often staff will check for incoming text messages

- ☐ Remind learners to update staff if their cell phone number changes.

- ☐ Explain the technical requirements of using their mobile phone for text messaging.

- ☐ Practice text messaging with learners by sending them a test text message and asking them to respond to the message.

Directions: The *Sample Text Messages to Obtain Learner Feedback on Using Text Messaging* is a resource for AE program directors and staff to use in gathering learners' feedback about the helpfulness of the text messages that staff have exchanged with learners. Learners' feedback can guide staff to improve their text messages to better address learners' needs. Below is a sample text message that staff can adapt to use with learners during their participation in an AE program or after they leave an AE program.

The survey can be sent as a text message, where the respondent will be identified.

Hi! I'd like your feedback about the text messages that I have been sending you. (1) Were they helpful? If so, in what ways? (2) How could the text messages be (have been) more helpful to you? (staff name)

To obtain anonymous feedback, the AE program staff can create an online survey. The text message sent to learners can then include the link to the survey.

Hi! I'd like your feedback about the text messages that I have been sending you. Please take 2 minutes to complete the following survey by (deadline). Here's the link: (survey link). Thanks in advance. (staff name)

Appendix I: Text Message Tracking Form

Overview: The *Text Message Tracking Form* can be used by AE staff to document the topics of the text messages that they send to and receive from learners. AE program directors and staff can review the information collated from the forms to identify the range of questions that learners have or issues that they encounter in participating in the AE program. These data can help program directors and staff determine what types of new information or processes a program might need to facilitate its learners' participation and success in the AE program.

Directions: The tracking form is a monthly record of the number of text messages that staff and learners send to each other, organized by the topic of the text message. As shown in the first column, "Topics of Text Messages" covers five categories of text messages to track—*Learner Personal Support, AE Program Operations, Academic Activities, Planning Next Steps*, and *Types of Resources*—based on findings from the TBCAE project. Each category of messages can be expanded with additional topics, and new categories can be added on the form as needed.

The remaining columns on the form are organized into four-week periods. Staff can record the number of text messages they send to and receive from learners each week by subtopic and list the specific issues or questions that the text messages address for those subtopics, particularly those that are not commonly raised by learners. The lists of issues by subtopic can alert staff to new challenges and barriers that learners are encountering and may need assistance in addressing. The intent is to use the list of issues as a source of information about learners' emerging needs.

The form can be adapted. Criteria can be set for the types of issues that staff can record on the form.

AE program directors and staff will want to review the forms on a regular basis (e.g., monthly or quarterly). Review will identify re-occurring issues or questions that are the focus of the text messages, which can point to the need for new program guidance or resources to address those issues or questions. Regular review also enables AE program directors to monitor whether adding new program processes, guidance, or resources helped to decrease the number of learners posing the same issues or asking the same questions.

Name of Staff Member:								
	Week of MM/DD/YY		**Week of MM/DD/YY**		**Week of MM/DD/YY**		**Week of MM/DD/YY**	
Topics of Text Messages	# of Msg	Specific Issue	# of Msg	Specific Issue	# of Msg	Specific Issue	# of Msg	Specific Issue
Learner Personal Support								
Health, well-being								
Attendance								
Motivation building, reinforcement								
Other: List								

Appendix I: Text Message Tracking Form

Name of Staff Member:								
	Week of MM/DD/YY		Week of MM/DD/YY		Week of MM/DD/YY		Week of MM/DD/YY	
AE Program Operations								
Administrative procedures								
Technology access, use								
COVID-related								
Access to and use of supportive services								
Other: List								
Academic Activities								
Academic progress, requirements								
Program, course guidance								
Studying, test-taking								
Other: List								
Planning Next Steps								
Career, college readiness								
Determining next steps								
Tuition, financial aid								
Applications for college, employment								
Other: List								
Types of Resources								
AE program materials								
Career pathways, transition to college								
Information not related to AE program								
Other: List								

TBCAE Compendium of Text Messages

Note: The TBCAE Compendium was adapted from work conducted as part of the Study of the Effects of Transition Planning Process (TPP) on Adult Basic Skills Learners' GED® Attainment and Enrollment in Postsecondary Education, U.S. Department of Education, Institute of Education Sciences, Grant #R305L170012 to Abt Associates.

Goals and General Activities	Adult Education (AE) Staff Activities to Support Text Messaging	Examples of Text Messages to Learners
1. Introduce Learners to Text Messaging		
Obtain learners' cell phone numbers to introduce learners to text messaging.	1.1. Send text messages to introduce learners to using text messaging.	*Hello (name of learner),* 1.1.1. *Welcome to (name of AE program) texting project. I'm (name of AE staff) and I will be sending you texts to assist you with achieving your goals for participating in (name of AE program).*
	1.2. Encourage learners to respond to text messages.	1.2.1. *I will send you texts to give you information and ask how you are doing. I can also answer questions that you may have about participating in (name of AE program).* Ask learner to respond to your text so that you know that the learner's mobile number is correct.
2. Review Learners' Progress with Learning Plan (if appropriate)		
Review learners' progress in addressing skills on their Learning Plan.	Check status of learners' progress in learning the skills and knowledge listed on their Learning Plan based on review of learners' participation and completion of class work.	
3a. Monitor Learners' Attendance		
Monitor learners' attendance to identify learners who are absent more than the number of consecutive classes per the program's policy.	3a.1. Work with AE program staff who have access to attendance data to monitor attendance.	
	3a.2. Contact learner to identify and help address the issue.	*Hello (name of learner),* 3.1.1. *I am just checking in on you; I know that you have missed some classes? Is everything going ok?* 3.1.2. *Do you want to talk or can I connect you to someone who can help you?*

Goals and General Activities	Adult Education (AE) Staff Activities to Support Text Messaging	Examples of Text Messages to Learners
3b. Encourage Learners' Participation		
Create calendar for sending text messages to learners related to attendance with encouraging messages to keep them engaged in their work.	3b.1. *End of Week 1:* Congratulate learners for completing orientation and basic skills assessments (e.g., TABE, CASAS) (*customize to program*); encourage them to begin classes (instruction) and tell them that you are pleased to have them in classes. 3b.2. *End of Week 2:* Welcome learners to class; encourage them on their choice to take classes. 3b.3. 12 *Hours of Instruction Benchmark:* Send text when learners reach 12 hours of instruction and encourage them to keep up their great record of attending class. 3b.4. *Follow Up on Class Assignment, Homework:* Send text related to their assignment or homework to encourage their completion. 3b.5. *When Learners are Absent:* Send text that learners are missed. For example, "Hope you are okay and hope to see you in the next class. This is a summary of what you missed."	
4. Promote AE Learners' Participation in High School Equivalency (HSE) Testing		
Track readiness of learners to begin HSE testing based on criteria such as results of class progress measures, performance on HSE practice test, or in HSE subject areas.		

Goals and General Activities	Adult Education (AE) Staff Activities to Support Text Messaging	Examples of Text Messages to Learners
	4.1. Contact learners to encourage HSE testing.	*Hello (name of learner),* 4.1.1. *Have you taken the (insert name of HSE practice test) yet?* 4.1.2. **If YES**: *Are you ready to take any of the subject tests?* 4.1.3. **If YES**: *Which test?* 4.1.4. *When are you planning to take (name of subject area test)?* 4.1.5. *Good luck with your test!* 4.1.6. **If NO**: *When are you planning to take (insert name of HSE practice test)?* 4.1.7. *Is there anything causing you not to want to take the (insert name of HSE practice test)?*
Track learners' completion of HSE subject area tests.		
	4.2. Contact learners regarding completion of subject area tests.	***Learners who have been taking subject tests:*** *Hello (name of learner),* 4.2.1. *I am just checking in to ask how you did on your (name of subject area test).* ***If learner received a passing score:*** 4.2.2. *Good job! Which test are you focusing on next?* 4.2.3. *When are you thinking about taking the test?* 4.2.4. *Good luck with your test!*
	4.3. Contact learners regarding completion of subject area tests that were not completed satisfactorily.	***Learners who did not pass subject area tests:*** *Hello (name of learner),* 4.3.1. *When are you planning to retake (name of subject area test)?* ***If learner does not know when they will retest:*** 4.3.2. *I understand. Let's talk about this more, ok?*

Appendix J: TBCAE Compendium of Text Messages

Goals and General Activities	Adult Education (AE) Staff Activities to Support Text Messaging	Examples of Text Messages to Learners
5. Facilitate AE Learners' Enrollment in Postsecondary Credit Courses		
	5.1. Check in with learners to review goal for further education.	*As learners progress through HSE subject area tests:* *Hello (name of learner),* 5.1.1. *Are you still thinking about taking college courses after you earn your (insert name of HSE credential)?* 5.1.2. **If YES**: *What classes are you thinking about taking?* 5.1.3. *If you would like to talk about this in more detail, let's make an appointment to talk.* 5.1.4. **If NO**: *What are you planning to do after you earn your (insert name of HSE test) HSED?* 5.1.5. **If NO**: *Let's make an appointment to talk.*
	5.2. Connect learners to financial aid information.	*To learners thinking about taking college courses. Customize for AE program; send multiple texts.* 5.2.1. *Be sure to attend the (name of session) on financial aid information on (date) at (time) in (location).* *AFTER SESSION(S):* 5.2.2. *Did you attend the (name of session) on financial aid information?* 5.2.3. *Let me know if you have any questions.*
	5.3. Connect learners to financial aid information forms.	*To learners planning to attend college:* 5.3.1. *Have you submitted your FASFA (or other forms)? Have you submitted your application for (customize to other college aid opportunities available to AE learners)?* 5.3.2. **If YES**: *Great! Glad that you submitted it.* 5.3.3. **If NO**: *Do you need any assistance in completing the form? Let's make an appointment to make sure you can get this done in time.*

Goals and General Activities	Adult Education (AE) Staff Activities to Support Text Messaging	Examples of Text Messages to Learners
	5.4. Assess learners' feasibility to participate in postsecondary courses.	***To all learners:*** 5.4.1. *Are you planning to take college courses?* 5.4.2. **If YES**: *Great! Scheduling classes with everything else you are doing can be challenging. Have you started to make a plan?* 5.4.3. **IF YES**: *Do you have any questions about planning for college that you would like to discuss?* 5.4.4. **If YES**: *Instructor or career coach sets up a time to talk.* 5.4.5. **If NO**: *That's ok. What plans do you have instead?*
	5.5a. Prompt learners to take college placement test. 5.5b. Prompt learners to check if test results are in college system.	***For colleges that require a college placement test:*** 5.5.1. *Have you taken the college placement test yet?* 5.5.2. **If YES**: *Great! How did you do?* 5.5.3. **If NO**: *Ok. You will want to do it before (date) so you can register on time on (date).*
Monitor learners' completion of college application.		***Send text to ask whether learner has completed application form if application has not been completed.***
	5.6a. Connect learner with: college subject advisor, career and technical education advisor, campus advisor, union representative, or other individual who can assist learners with enrollment in postsecondary courses.	*Hello (name of learner),* 5.6a.1. *Did you get in touch with the (advisor/subject instructor)?* 5.6a.2. **If YES**: *Instructor responds to questions or asks what questions the learner has.* 5.6a.3. **If NO**: *Instructor asks what happened and how a meeting can be set up.*
	5.6b. Monitor learners' registration for college.	*Hello (name of learner),* 5.7b.1. *Have you registered for college courses for next term?* 5.7b.2. **If YES**: *Great! Instructor asks if learner has any questions.* 5.7b.3. **If NO**: *Instructor asks if learner needs any assistance in registering.*

Goals and General Activities	Adult Education (AE) Staff Activities to Support Text Messaging	Examples of Text Messages to Learners
	5.8. Monitor learners' enrollment in college courses.	***During course enrollment for next term/semester--For AE learners who were planning to enroll in college:*** *Hello (name of learner),* 5.8.1. *Were you able to register for your college classes?* 5.8.2. **IF YES**: *Great! Good luck with your courses. Let me know if you need anything.* 5.8.3. **If NO**: *Instructor responds to issues and offers help.*
	5.9. Provide learners with information to connect with local American Job Center or other workforce organization with whom the AE program works.	***For learners who indicated that employment is their next step:*** *Hello (name of learner),* 5.9.1. *Have you contacted (insert name of American Job Center or other workforce organization with whom the program works) to explore your job opportunities?* 5.9.2. **If YES**: *Instructor asks whether learners need additional resources or assistance.* 5.9.3. **If NO**: *Instructor encourages learners to access available employment-related resources.*