

Lifelong Learning Account (LiLA) National Cohort Request for Applications



Overview

Third Sector, a technical assistance nonprofit that advises government agencies on outcomes-based systems change, in partnership with the **U.S. Chamber of Commerce Foundation**, is offering six months (February - August 2024) of pro bono technical assistance and training to local and state government agencies and their cross-sector partners – including employers and industry associations – interested in leveraging Lifelong Learning Accounts (LiLAs) to upskill or reskill their workforce. Participating teams in Third Sector's national cohort will co-design a LiLA pilot and develop an implementation plan for that pilot program with the goal of launching in late 2024.

A Lifelong Learning Account (LiLA) is a structured program designed to facilitate continuous skill development and education throughout an individual's career. It provides a dedicated savings account, often financially supported by employers, government agencies, or a combination of both, which can be used by workers to access a wide range of educational and training opportunities. LiLAs are a powerful tool for addressing the critical need to upskill and reskill incumbent workers. They empower employees to proactively invest in their professional growth, enabling them to acquire new skills, adapt to evolving job requirements, and remain competitive in their respective fields. By offering a dedicated financial resource and a systematic approach to lifelong learning, LiLAs not only benefit individual workers but also contribute to a more skilled and adaptable workforce, which in turn fosters economic growth and innovation.

Third Sector will host an informational webinar on **September 22, 2023 at 1:30 ET** to provide more details on the cohort opportunity and to answer questions. [Register here.](#)

Webinar registration, key dates information, and any potential amendments to this information will be posted on [Third Sector's website.](#)

The Opportunity

Third Sector has partnered with the U.S. Chamber of Commerce Foundation, which leads the Talent Finance initiative and brings alternative finance expertise, to develop a cohort to train and support in co-designing a LiLA pilot that leverages public funding and engages more employers to invest in upskilling their workforce. Third Sector will provide technical assistance, drawing on our experience and expertise supporting public sector partners to leverage data, policy, and funding to develop and implement innovative, outcomes-oriented programs and services. A cohort of 3-5 teams will engage in virtual workshops over approximately six months, starting in February 2024 and concluding in August.

Participating teams will also receive one-on-one coaching support from an advisory committee of subject matter experts to help them customize their LiLA pilots to local contexts and populations of focus.

Cohort teams will:

- Engage with other cross-sector teams from across the country that are committed to directly linking dollars to evidence of workforce success;
- Benefit from individual coaching from subject matter experts in LiLA implementation;
- Participate in virtual technical assistance workshops facilitated by Third Sector, a national leader in outcomes-focused government partnerships, and the U.S. Chamber of Commerce Foundation to design elements of the pilot program;
- Create a draft LiLA Implementation Plan; and
- Receive resources for practical implementation.

During workshops, Third Sector will curate a combination of facilitated exercises to explore various design components of a LiLA pilot, guest presentations from subject matter experts, workshop time for cohort teams, and opportunities for teams to compare notes and troubleshoot common challenges. We have found that cross-state cohorts provide motivation and support to leaders across jurisdictions because they are not constrained by the “status quo” from their own state and are able to jointly identify creative ways to use federal, state, and private funds.

About LiLAs

Lifelong Learning Accounts (LiLAs) are a relatively new savings account for education and training services that enable individuals to obtain basic education, upskilling (deepen existing skills in a chosen field), and/or re-skilling (learn a new trade) in order to qualify for jobs that pay higher wages and help people move up the economic ladder. Funding contributed to LiLAs may enjoy special tax treatment and benefits. Unlike current employer-sponsored training programs that are conditional on employment, LiLAs are envisioned as universal, portable accounts. Since individuals own these accounts, they have a higher degree of flexibility and agency in how the funds are used while still benefiting from potential public and private contributions and/or match funding. LiLAs are one way to support working people’s agency and access to new education and training opportunities. Various pilot programs have been conducted in Washington state, Maine, New York City, Northeast Indiana, San Francisco, and abroad.

LiLA Design Principles

Designing a Lifelong Learning Accounts program provides a strategic framework to foster continuous skill development and adaptability in the workforce. It empowers individuals to proactively shape their career trajectories while enabling organizations to cultivate a highly skilled and resilient workforce, driving long-term success and competitiveness. Below are promising design principles for designing a LiLA program.*



Universality: LiLAs inclusive design provides each individual access to savings accounts and target specific populations through intentional outreach and recruitment strategies.



Broad Use of Funds: LiLAs should cater to individual learning needs, including educational activities and wraparound support (e.g., transportation, child care, etc.) needed to succeed in education and training.



Portability: An individual should have sole ownership of their LiLA and be able to access funds regardless of their current employment status.



Matched Funding: In addition to individual contributions, employers, state/local government agencies, and other third-party sources (e.g., foundations) have the option to, and are encouraged to, contribute funds and/or match individual contributions.



Informed Choice: Individuals have the agency to pursue training and education according to their career goals. The support of career coaches or advisors is encouraged to help individuals make these decisions and select quality programs and providers.

**Adapted from Council for Adult & Experiential Learning (CAEL), 2009*

Eligibility

Priority selection for cohort participation will be based on the following factors:

- Public/Private cross-sector partnerships (i.e. a combination of local/state governments, employers, industry associations, financial institutions, and nonprofit organizations) that are committed to participating in the co-design phase workshops and interested in implementing a pilot (additional cross-sector partners are welcome)
- Aligned values and interests in leveraging Lifelong Learning Accounts (LiLAs) to upskill and reskill workforce
- Demonstrated commitment to exploring LiLAs from department, agency, and organizational leadership
- Staff capacity and commitment to participate in 8-10 workshops and utilize technical assistance resources in between workshops over the course of 6 months
- Identified potential funding sources for a LiLA pilot program
- Access to education/training and workforce outcomes data

How to Apply and Key Dates

Details on how to apply for Third Sector’s Lifelong Learning Account National Cohort Technical Assistance Opportunity are provided below. **The priority deadline for LiLA applications is Monday, October 23, 2023 and the official deadline is November 3, 2023 by 5:00p.m. EST.** We expect this application should take no longer than four hours to complete.

Lifelong Learning Account National Cohort Technical Assistance Opportunity	
October 23, 2023	Priority deadline. <u>Use this application here</u> (instructions for submissions are at the top of the document).
November 3, 2023	Official deadline. <u>Use this application here</u> (instructions for submissions are at the top of the document).
November 6 - November 16, 2023	Full review of applications and follow-up calls, if needed
November 17, 2023	Announcement of technical assistance recipients
December 6, 2023, 1:30 - 3:00 p.m. ET	Virtual Kick-Off Convening (agenda and details to follow)
TBD, February 2024	Virtual Technical Assistance begins

**Webinar registration, key dates information, and any possible amendment to this information will be posted on [Third Sector’s website](#).*

LiLA Cohort Application

LiLA applications will be accepted through this [Google form](#). The selection factors are included below: (100 Points Total)

Factor 1 - Vision & Alignment (25 pts)

- Describe the partnership's vision, objectives, and strategies for implementing the lifelong learning account program, including anticipated outcomes. (150 words)
 - Explain how this technical assistance and training opportunity aligns with the recipient's organizational priorities (please include current stated and/or strategic plan goals to support workforce upskilling) and why technical assistance can help reach stated goals or strategic plan. (150 words)
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Factor 2 - Partners & Capacity (30 pts)

- List the cross-sector (i.e., public, private, nonprofit) organizations, agencies, and companies involved in the partnership, including their expertise in relevant areas and how they will contribute to the partnership during this technical assistance cohort. Contributions could include:
 - Workforce-related partnerships (please specify), including existing relationships with employers and industry partners.
 - For employers: interest in improving employee education benefits, upskilling or reskilling employees, and prior efforts to do so if applicable.
 - Proximity to public funding streams that could support a LiLA pilot.
 - Existing interest and/or efforts in validating credential quality and/or use of Learning and Employment Records (LERs).
 - Existing or prior experience in financing adult education and training.
 - Existing or prior experience designing savings products.
 - Proximity and relationships to other key stakeholders, including workers who may benefit from a LiLA pilot program.
- Describe leadership's interest in, commitment, and ability to implement a LiLA program. (100 words)
- Describe the partnership's willingness to commit dedicated staff time to support the project (e.g., project manager, senior leadership, and other key cross-sector liaisons), including the name, title, and contact information of a dedicated project manager(s) who will oversee cohort participation and pilot project development. (100 words)

Factor 3 - Funding (20 pts)

- Describe any funds that could be used towards launching a potential LiLA pilot. (200 words)
 - If available, reference current or potential funding for implementing the pilot in late 2024.
 - If available, reference any existing upskilling or education/training financing programs supported by data-driven approaches.
 - Describe any known restrictions or conditions for the funding sources identified.
 - Describe the process and timing to access those potential funds.
 - Identify key questions that would need to be answered in order to access these funds.
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Factor 4 - Data Access & Capacity (15 pts)

- Describe your current as well as potential access to education and workforce outcomes data. (250 words)
 - Describe relevant (e.g., education/training and workforce) data sources that may be used in this effort (database or source name, frequency collected, process for pulling reports, ability to disaggregate, etc.).
 - Describe the education and workforce metrics that are current priorities for your agency and your partners.
 - Describe your team's capacity to access data. (100 words)
 - Identify the team member who would likely be able to have data access.
 - Please name any partners that support you in your collection of data and validation of quality.
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Factor 5 - Potential Risks & Barriers to Implementation (10 pts)

- Describe any potential limitations/barriers to implementing the project successfully (e.g., political, legal, financial, technical barriers) and potential strategies or plans to manage or mitigate these barriers. (100 words)
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Factor 6: Commitment to Collaboration (Required):

- Each organization, agency, company, etc. of the partnership must submit a signed copy of the **LiLA Letter of Commitment available here** to demonstrate their dedication to cross-sector collaboration and the long-term sustainability of the Lifelong Learning Account program.



About Third Sector

Founded in 2011, Third Sector is a national nonprofit helping to unlock possibility, confront inequity, and catalyze change to the benefit of the people and places our government, community-based, and philanthropic partners serve. We are a technical assistance organization that advises our government agencies on effective ways to reshape their policies, systems, and services toward better outcomes for all people, no matter their race, background, and circumstances. To learn more, visit our website, www.thirdsectorcap.org.



U.S. Chamber of Commerce
Foundation

About the U.S. Chamber of Commerce Foundation

The U.S. Chamber of Commerce Foundation harnesses the power of business to create solutions for the good of America and the world. We anticipate, develop, and deploy solutions to challenges facing communities—today and tomorrow. The U.S. Chamber Foundation leads the **Talent Finance** initiative, an effort to advance public-private finance innovations that can make education, training, and credentialing more affordable, with less debt, and that can achieve better outcomes.

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