A RESOURCE GUIDE
for
Community Action Agencies and
Other Community-Based Organizations
in Massachusetts

Establishing Effective Workforce Development Programs

A Research and Technical Assistance Project Conducted by:
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Contents

Chapter 4. Operating a Workforce Development Program 55

Lessons Learned: Summary of Key Points.. 84

Appendices

>>Troubleshooting Guide on next page.

Quick Reference to Information in This Resource Guide on Typical Workforce Development Issues & Questions

Issue	Guidance Topic	Page Ref.
For setting program objectives, how should concepts like workforce development and self-sufficiency be defined?	Workforce Development and Self-Sufficiency	pp. 6-15
What's the connection between workforce development and the Workforce Investment Act?	Workforce Development and Self-Sufficiency	pp. 7-10
What benchmarks of self-sufficiency have been developed?	Workforce Development and Self-Sufficiency	pp. 10-15
What types of roles do organizations play in workforce development?	Getting Started	pp. 26-27
What's the best approach to evaluating organizational goals to ensure they are in line with our workforce development program objectives?	Setting Organizational Goals Examining Internal Agency Structure	pp. 27-28 pp. 31-33
How best to go about conducting a community audit?	Using Data from a Community Audit	pp. 29-30
What is important to know about coordinating with prospective employers?	Focusing on Both the Target Community and Employers	pp. 30-31
What strategies for funding long-term workforce development show promise?	Leveraging Funding Strategies	pp. 33-36
What funding approaches do CAAs use?	Leveraging Funding Strategies	p. 37
What role do WIBs play in workforce development?	Working Strategically within the System	pp. 39-40
How best to find out about the local labor market?	Working Strategically within the System	p. 40
What is the importance of coordinating with community colleges?	Working with Post-Secondary Education Institutions	pp. 41-42
What are typical characteristics of CBO-employer partnerships?	Engaging Employers as Partners and Co-investors	p. 42
What are effective ways of working with employers?	Engaging Employers as Partners and Co-investors	p. 43
What's an appropriate service mix to provide in support of workforce development?	Deciding Which Services to Provide	pp. 55-57
Are their useful models to consider for working with clients in a workforce development program?	Deciding Which Services to Provide	pp. 55-56
What are effective strategies for success with job placement?	Job Placement, Retention, and Advancement	p. 60
What are key considerations for the education and training aspects of programs?	Education and Training	pp. 61-62
Why are "wrap-around" services important?	Wrap-Around Support Services	p. 63
How can the Self-Sufficiency Standard be used in workforce development?	Use of the Self-Sufficiency Standard	p. 67
What is important to know about measuring results?	Measuring Results	pp. 68-70

Vision and Purpose

Imagine a community-based organization involved in workforce development…

…that is wholly committed to assisting vulnerable populations in reaching self-sufficiency through career advancement.

…that demonstrates this commitment through rigorous organizational and program goals focused on the often more demanding outcome of self-sufficiency.

…that regularly and strategically plans how it can and should be engaged in the workforce development activities in its region and takes a strategic position in the workforce development system.

…that serves both individuals and their employers in a dual-focus mission.

…that develops smart and effective partnerships with other community-based organizations, post-secondary educational institutions, employers, and other stakeholders to assist individuals in moving toward self-sufficiency.

…that operates workforce development programs that include access to education, training, employment, and "wrap-around" support services when, where, and how individuals need them.

…that is funded sufficiently to deliver the programs, services, and supports that low-income populations require to reach self-sufficiency.

…that tracks participant progress all the way to self-sufficiency and measures meaningful results.

This is the vision of this Resource Guide.

• Purpose of the Guide

Although no organization can "do it all," and there is no single model for designing workforce development strategies and programs that works the best, we intend for this guide to help your organization get closer to this vision. It offers technical assistance information and promising practices gleaned from reviews of other organizations, summative reports and evaluations, and our own survey of Community Action Agencies (CAAs) and other community-based organizations (CBOs).

• Organization of the Guide

After an opening chapter that provides extensive background and context on workforce development, the guidance in this document is presented within three areas of emphasis that CBOs must consider when initiating or expanding such programs:

- **Planning for workforce development (Chapter 2)**. In this chapter, we consider what it means for an organization to really commit to helping individuals and families progress toward self-sufficiency through career advancement, how to clarify the CBO role in workforce development, why and how to plan strategically and regularly in this field, how to leverage community audits, why and how to establish a "dual focus" on workers and employers, how to examine the internal agency structure to make sure it supports the mission, why and how to set organizational goals, and ideas for funding strategies.

- **Working with the workforce development system and establishing partnerships (Chapter 3)**. In this chapter, we present promising strategies for working with other community-based organizations and service providers, working with post-secondary education institutions, engaging employers as partners and co-investors as well as researching their labor needs, and taking a strategic position in the public workforce development system. This chapter includes several case studies and "best practice" vignettes as examples of what other organizations have done.

- **Operating a workforce development program (Chapter 4)**. Here we provide overviews of and resources on various aspects of operating effective workforce development programs, including recruiting, assessing, and providing case management for participants; providing job placement, retention, and advancement support; delivering education and training programs; providing "wrap-around" support services; using a self-sufficiency standard to support this work; and tracking participants and measuring results. This chapter also includes several case studies as examples of what other organizations have done.

The final section highlights the "lessons learned" for workforce development based on preparation of the guide, and appendices provide additional resources.

• The Challenge of Workforce Development

As stated above, this guide is not intended as a step-by-step prescription for how a CBO can transform itself into the most effective, efficient, and strategic workforce development agency. We know it takes hard work and more than a "how to" manual to realize the vision set forth above. For this reason, the guide presents ideas, examples, promising practices, and technical information intended as the best resources for assisting CBOs in their quest toward this vision. Each state, region, city, and neighborhood in which CBOs operate is unique and requires customized workforce strategies to best meet identified needs. This is why the guide is designed primarily to provide CBOs with resources—organized into three succinct areas of emphasis—to support their efforts to achieve this vision.

As the developers of this guide, we recognize that imagining a CBO involved in workforce development that fits this vision is the easy part. We hope this guide assists you with the hard part of planning programs, strategically connecting to the workforce development system and establishing partnerships, and operating effective programs. We wish you every success in your efforts.

• Notes to the Reader

- **Intended audience.** While this Resource Guide was primarily written for Community Action Agencies (CAAs) operating in Massachusetts, our expectation is that the wealth of information provided also will be useful to other community-based organizations (CBOs) operating in the workforce development arena across the country. Indeed, it is our hope that the guidance provided will help facilitate effective partnering among the various entities typically needed to help low-income individuals obtain promising work that enables them to advance along the path to self-sufficiency.

- **Intended use.** The guide is designed to be comprehensive in addressing the different aspects of workforce development programs. As such, it is intended to be consulted as needed for information on topics of interest and pointers to other resources, rather than approached primarily as a document to be read cover to cover.

- **Background research.** A wide range of research information was drawn on in developing this Resource Guide. In particular, a nationwide survey of CAAs and other CBOs was conducted to obtain current information on approaches to workforce development. The findings from the survey are noted and referenced throughout this document. Other, related research and topic-specific studies further inform the guidance presented. Sources are noted and pointers to further information are provided as appropriate.

- **Project partners.** Collaborators with the Massachusetts Association for Community Action (MASSCAP) (http://www.masscap.org) that participated in development of this Resource Guide include Commonwealth Corporation (http://www.commcorp.org) with its research partner FutureWorks (http://www.futureworks-web.com), the Massachusetts Department of Housing and

Community Development (DHCD) (http://www.mass.gov/dhcd), the Women's Union (http://www.weiu.org), and Wider Opportunities for Women (WOW) (http://www.wowonline.org).

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- **_Electronic version of this guide._** This resource guide is available electronically at http://www.masscap.org/wfd-guide.html.

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Background and Context

⚿ *Key information in this section:*

     ☑ Workforce development concepts.
     ☑ The connection with promoting self-sufficiency.
     ☑ Reasons for getting involved.
     ☑ Primary considerations.

Why This Guide?

While many Community Action Agencies (CAAs) and other community-based organizations (CBOs) across the country provide leading-edge programs in worker education and training, in many localities the CAA/CBO network is not systematically or fully integrated with the institutions and services established through the federal Workforce Investment Act.

This issue is the focus of this *Resource Guide* for use by Massachusetts and other local, state, and national CBOs. This guide presents innovative approaches and promising practices in assisting low-income families and individuals to advance in the labor force, achieve higher income, and move toward greater economic independence.

Methodology: Development of This Guide

The intent of this Resource Guide *is not* to prescribe a step-by-step process that CBOs could follow in planning, implementing, and evaluating workforce development programs. Given the diversity of populations served and the specific local context, a standardized approach is unlikely to work. Rather, the intent is to present CBOs (and others) interested in providing new workforce development programs or strengthening current services with ideas and resources for:

- Internal planning.

- Establishing partnerships with others in workforce development.

- Operating and evaluating workforce development programs aimed at assisting individuals and families committed to achieving economic self-sufficiency.

The guide concludes with some lessons learned by programs in Massachusetts and in other states regarding the implementation of effective workforce development programs.

The overall approach to this guide was to identify and present information regarding current promising and innovative practices that CBOs could consult in their efforts to initiate or improve workforce development services. Using this approach, the guide draws on four sources of information:

- Prior research into self-sufficiency by a partnership between the Massachusetts Department of Housing and Community Development (DHCD), the Commonwealth Corporation (CommCorp), and the Massachusetts Association of Community Action Programs (MASSCAP) (i.e., see the report *Do You Know the Way to Self-Sufficiency? A Case Study Report on Using a Self-Sufficiency Framework to Guide Workforce Development Programs and Policies*, 2003).[1]

- A literature review.

- The results of a survey of selected programs in Massachusetts and elsewhere in the nation.

- Findings from a 1999 MASSCAP survey on workforce development activities in Massachusetts.

Workforce Development and Self-Sufficiency

• What Is Workforce Development?

Until the late 1990s, there was little talk of workforce development. Job training or employment training were the terms used at that time. Since then, however, the terms *workforce development* and *workforce investment*—often used interchangeably—have been used increasingly to refer to activities simultaneously aimed at meeting the needs of businesses for skilled labor and the needs of individual workers for jobs.

Yet the phrase *workforce development* means different things to different people. Notably, in the 2002 paper *Understanding Workforce Development: Definition, Conceptual Boundaries, and Future Perspectives,*[2] the author points out in his description of workforce development in Ohio that "workforce development has increasingly come to describe a relatively wide range of learning-for-work activities and programs. Unfortunately, no one definition adequately defines its meaning." He goes on to say that:

Workforce development has emerged to describe a relatively wide range of activities, policies, and programs. For example, many professionals involved in administering secondary vocational education programs, welfare-to-work and other public assistance programs, and regional

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[1] Available at http://www.masscap.org/workforce/fnlstudies9-24-3.pdf
[2] Available at http://www.umanitoba.ca/unevoc/2002conference/text/papers/jacobs.pdf

economic development initiatives now use workforce development to describe their services. Several recent pieces of state and federal legislation use the term to describe various youth vocational training, adult training and retraining, and related employment initiatives. As a result of these legislative and policy changes, many states...have included the term in the naming of various governmental coordinating boards, initiatives, and task forces (Grubb and Associates, 1999). The term also describes an extensive array of training and educational programs available to state of Ohio bargaining unit employees (Jacobs, Skillings, & Yu, 2001). Previously, such joint employer-union supported learning opportunities might have been viewed as an employee benefit. Finally, perhaps in response to these other changes, several graduate programs—including our own at Ohio State University—now use workforce development instead of vocational-technical education as part of their program's name. Not surprisingly, there are fundamental differences when interpreting the meaning of workforce development. One view is that the term merely describes how one prepares to enter an occupation. That is, workforce development becomes a proxy for career and technical education. An alternative view is that the term harkens us to consider a different perspective on working and learning, broadly speaking. That is, the term signals a growing awareness that previous conceptualizations in this area are inadequate to address emerging challenges. Programs that might occur in schools, organizations, or agencies are, in fact, mutually dependent on each other when considered from a broader societal perspective.

At a national level, the National Governors Association defines workforce development as:

> [E]ducation, employment, and job training efforts designed to help employers to get a skilled workforce and individuals to succeed in the workplace. Widespread skill shortages are impeding economic growth at this crucial time. At the same time, many workers lack the skills to get and hold jobs that are good enough to make them self-sufficient. Addressing these twin challenges in the New Economy environment is the main concern. [See http://www.nga.org/center/topics/1,1188,D_409,00.html]

The Office of Adult Services in the U.S. Department of Labor's Employment Training Administration sees as its mission contributing to the implementation of a national workforce development system that "provides workers with the information, advice, job search assistance, income maintenance, and training they need to get and keep good jobs and provides employers with skilled workers." (See http://www.doleta.gov/programs/adult_program_more.cfm and http://www.doleta.gov/programs/adult_program.cfm.)

• What Is Self-Sufficiency?

Emergence of a Key Concept

The concept of *self-sufficiency* is integral to the federal Workforce Investment Act (WIA) and workforce development programs across the country, as well as other programs designed to help low-income individuals improve their economic security. Title I and II of WIA state that workers are eligible for intensive services if they are in jobs not leading to self-sufficiency; that state and local workforce investment boards must define self-sufficiency; and that the Department of Labor may carry out demonstration projects to help local areas develop self-sufficiency standards to evaluate progress. (For more on WIA, see sidebar.)

Self-sufficiency is an important concept because it emphasizes the need for workforce development programs to help workers earn family-sustaining wages and to live free of public

and/or private supports. Self-sufficient workers perform better on the job, can provide for their families' basic needs, and contribute to the economy and the community.

Although there is widespread acceptance among policymakers and practitioners that self-sufficiency is an important goal for workforce development programs, the lack of a common definition of what it means to be self-sufficient in a given community has resulted in varying emphasis for policies and programs, as well as varying outcomes for workers seeking workforce development services.

Most people will accept that employment is the key to economic self-sufficiency. However, there is also growing awareness that the "work first" emphasis of the current public policy framework does not necessarily promote the long-term education, training, services, and supports that will enable individuals to advance to jobs that pay family-sustaining wages. While thousands of low-income individuals have entered the labor market in recent years, research reveals that few have made the gains necessary to become economically self-sufficient.[3] This predicament has given rise to a new and influential movement that seeks to define the real costs of living and working in the United States today in order to develop an economy that works for all Americans.

> *There is also growing awareness that the "work first" emphasis of the current public policy framework does not necessarily promote the long-term...services and supports that will enable individuals to advance to jobs that pay family-sustaining wages.*

Currently, the most widespread measure of self-sufficiency, or income adequacy, in the United States is the federal poverty measure. However, there is growing recognition that the federal poverty measure is an outmoded measure of income adequacy. This argument flows from the realization that the federal poverty measures no longer reflect the basic costs of raising a family and that they fail to adequately address the great geographic variation in cost of living. The federal poverty measure was developed in the 1960s and determined that a family spent about one-third of its income on food. Therefore, the federal poverty measure is simply a family's food budget multiplied times three and updated annually for inflation. It does not reflect the increased costs that families today face—compared with a family in the 1960s—for basic needs such as housing, child care, transportation, health care, and taxes.

The argument that the federal poverty measure is out-of-date is further grounded in findings from evaluations of programs for welfare recipients and other economically disadvantaged adults. These findings suggest that programs tend to improve the labor market outcomes of individuals, but by no means succeed at moving individuals to economic self-sufficiency. Put differently, there is increasing recognition that moving people off welfare into low-wage, often dead-end jobs may technically alleviate poverty but does not provide a wage that allows a family to meet its basic needs and live free of public or private supports. These findings further suggest that being "work ready" requires stability in other parts of life (e.g., being sober, free from abuse; having stable housing, reliable transportation, and child care).

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[3] For a review of these issues, see Kazis, Richard and Marc S. Miller, eds. 2001. *Low-Wage Workers in the New Economy*. Jobs for the Future. The Urban Institute Press: Washington, D.C. See http://www.urban.org/pubs/low_wage.

The Workforce Investment Act

The Workforce Investment Act (WIA) was signed into law in 1998, reforming Federal job training programs. Most states, including Massachusetts, began implementation July 1, 2000. The goal of this legislation is to create a comprehensive workforce investment system that is locally driven to increase the employment, earnings, and occupational skills of participants. The new system is intended to be "customer-focused," to help Americans access the tools they need to manage their careers through information and high quality services, and to help U.S. companies find skilled workers. This new law embodies the key principles of streamlining services through better integration of workforce development programs, empowering individuals through Individual Training Accounts and through improved labor market information, providing universal access for core services, and improving youth programs. The Act also emphasizes increased performance accountability, a stronger role for local workforce investment boards, and increased state and local flexibility in program design.

Title I of the Act effectively replaced the Job Training Partnership ACT (JTPA). Under WIA Title I, there are three separate funding streams: adults, dislocated workers, and youth. Although adult and youth services are still primarily targeted toward low-income individuals, a major difference between WIA and JTPA is that universal access is a focus of WIA. The WIA system is structured so that universal access exists for core services, but each workforce investment board is charged with establishing income eligibility guidelines for intensive and training services. WIA also established a new training system in which a qualified customer can choose training from list of eligible providers and pay for it through a voucher called an Individual Training Account (ITA). Title I services for youth include a variety of program elements provided to low-income youth with barriers to employment, incorporating a broad set of youth development principles and components. Youth services also eliminated a federal mandate (in JTPA) that a specific share of federal funds be spent on summer youth employment programs.

The Act was designed to create a workforce development system that would be more "customer-focused." One of the steps taken in this direction was to mandate the One-Stop model of service delivery. Whether employed, unemployed, or under-employed, a customer could walk into a One-Stop Career Center and receive an array of services from a number of possible partner agencies. The goal is to have many different funding streams available, with access to those services being seamlessly delivered. To streamline services, WIA requires partnerships with 17 programs administered by four federal agencies to make their core services available through the One-Stops and support the operation of One-Stops. These programs serve various target populations and represent a wide range of funding levels. In addition to Department of Labor employment and training programs, WIA requires partnerships with the Department of Education's Vocational Rehabilitation, Adult Education and Literacy, and Vocational Education (Perkins) programs. The required partners also include the Community Services Block Grant (CSBG) agencies that administer employment and training programs utilizing CSBG funds and as well as employment and training programs administered by the Department of Housing and Urban Development grantees. WIA does not require that all program services be provided on-site or co-located, as they may be provided through electronic linkages with partner agencies or by referral, but WIA does require that the relationships and services be spelled out in a Memorandum of Understanding (MOU).

WIA called for the development of workforce investment boards to oversee WIA implementation at the state and local levels. At the state level, WIA required the board to

assist the governor in helping to set up a system and to establish procedures and processes for accountability. At the local level, WIA required boards to carry out formal agreements developed between boards and each partner, and to oversee One-Stop operations. WIA mandates the types of members to participate in boards from various segments of the workforce development community, including private sector business representatives (at least 51 percent of members) and representatives from Labor, educational agencies and institutions, community based organizations, economic development, and the 17 partner programs listed above.

Approaches to Assessing Self-Sufficiency

To determine how much income is actually necessary for families to meet their basic needs, several alternative measures of income adequacy have been developed.

Variations of the Federal Poverty Measure. In the research community, for instance, labor economists and researchers of welfare programs have used a measure of low-income status defined as 200 percent of the federal poverty level. Many federal and state work-support programs (e.g., Food Stamps, Medicaid, and child care assistance) use a multiple of the federal poverty level to determine program eligibility. For example, the federal government provides Food Stamps to families at or below 130 percent of the federal poverty level.

Lower Living Standard Income Level. In the workforce development community, the responsibility of defining self-sufficiency under the Workforce Investment Act is assigned to states and local Workforce Investment Boards, but the Department of Labor uses a minimum standard called the Lower Living Standard Income Level (LLSIL), which is a poverty measure created by the Bureau of Labor Statistics. Updated annually using the Consumer Price Index (CPI), the LLSIL uses a basic family budget approach to produce an LLSIL for major geographic and metropolitan areas. While higher than the federal poverty threshold, it does not include all basic expenses such as child care.

The Self-Sufficiency Standard. In 1995, Wider Opportunities for Women (WOW) and Dr. Diana Pearce established the Self-Sufficiency Standard, which measures how much income working families need to meet their basic costs without public or private assistance. The Standard is a "bare-bones" budget that includes all of the costs faced by working families: housing, child care, food, health care, transportation, and taxes. It is calculated on a county-by-county basis for 70 different family types in each county. Through WOW's national Family Economic Self-Sufficiency (FESS) Project, 35 states and the District of Columbia have developed and implemented the Self-Sufficiency Standard to improve programs and policies for low-income working families. (See below for details on implementation of the Self-Sufficiency Standard in Massachusetts.)

Basic Family Budgets. Others also have developed new measures or indices of income adequacy that take into account different costs associated with raising a family—besides food expenditures—and address regional variation in the cost of living. One such effort was led by the Economic Policy Institute In Washington, D.C., and involved the creation of a series of basic family budgets. Housing, child care, health care, food, and transportation expenses are

included along with taxes when developing budgets. In addition, family composition and family residence are taken into account.

ROMA Self-Sufficiency Standard.   The national Results-Oriented Management and Accountability (ROMA) guidelines were established in 1994 for grantees of the Community Services Block Grant. These guidelines required measurement of specific goals and outcomes among Community Action Agencies. The ROMA goals, as established in October 1999 are listed below. (For a complete listing of the goals with accompanying measures, see http://www.roma1.org/files/Outcomes_MATF_99.pdf.)

> **GOAL 1: (SELF-SUFFICIENCY)**
> **LOW INCOME PEOPLE BECOME MORE SELF-SUFFICIENT**
>
> **GOAL 2: (COMMUNITY REVITALIZATION)**
> **THE CONDITIONS IN WHICH LOW INCOME PEOPLE LIVE ARE IMPROVED**
>
> **GOAL 3: (COMMUNITY REVITALIZATION)**
> **LOW INCOME PEOPLE OWN A STAKE IN THEIR COMMUNITY**
>
> **GOAL 4:**
> **PARTNERSHIPS AMONG SUPPORTERS AND PROVIDERS OF SERVICES TO LOW INCOME PEOPLE ARE ACHIEVED**
>
> **GOAL 5:**
> **AGENCIES INCREASE THEIR CAPACITY TO ACHIEVE RESULTS**
>
> **GOAL 6: (FAMILY STABILITY)**
> **LOW INCOME PEOPLE, ESPECIALLY VULNERABLE POPULATIONS, ACHIEVE THEIR POTENTIAL BY STRENGHENING FAMILY AND OTHER SUPPORTIVE SYSTEMS**

The U.S. Department of Health and Human Services (DHHS) is currently expanding ROMA's national goals and outcomes measures for release by the end of FY2005. For updates regarding the new ROMA, see http://www.roma1.org/files/Guide_to_Reporting_National_Indicators_b.doc.

In 2000 and 2001, eleven Community Action Agencies in Massachusetts piloted *the Massachusetts Self-Sufficiency Scales and Ladders Assessment Matrix* with support from the Massachusetts Department of Housing and Community Development (DHCD). This tool—which satisfies ROMA requirements—can be found at: http://www.roma1.org/files/rtr/MA_Scale.doc. (A version is also provided in this Resource Guide, at the end of Chapter 3.) Other ROMA tools and resources can be found at http://www.roma1.org/room4a.asp.

Self-Sufficiency Continuum Framework.   In tandem with the development of more adequate standards and informed by ROMA, research into economic self-sufficiency by the DHCD, the Commonwealth Corporation, FutureWorks, and the Massachusetts Association of Community Action Programs (MASSCAP) resulted in the introduction of a self-sufficiency framework (Figure 1) and a series of case studies of organizations offering services in support of progression along the continuum.

In this framework, the boxes below the continuum include a range of client assets or barriers at each stage. Each stage includes descriptors from various life domains, as adapted

from the Massachusetts Scales and Ladders tool, along significant domains (e.g., employment, education/training, housing, transportation, and child care). It would be more appropriate to include all of the descriptors at each of the 10 life domains used in the Scales and Ladders tool; however, this one-page model is designed to simply provide a generalized overview of clients at each stage, as well as the potential services they might need. If this model were to be used by community-based organizations, they would map more comprehensive and specific indicators.

The boxes above the continuum include the services clients may need in order to overcome barriers and strengthen assets. As with the lower boxes, the services listed in these boxes are general and wide-ranging. Different clients will require different services. However, a community or organization could tailor this model to their community or target population by listing the specific characteristics in the boxes below and the specific services in the boxes above the continuum.

Helping families move from poverty to self-sufficiency is not the sole domain of community-based organizations. They have a role in this journey; however, other organizations, agencies, and companies must be involved.

The circles include partners within the workforce development system (broadly defined) who are required to deliver the services. As is clear from the model, this "system" requires many different types of players and many of the same organizations operate at various levels in the continuum. Helping families move from poverty to self-sufficiency is not the sole domain of community-based organizations. They have a role in this journey; however, other organizations, agencies, and companies must be involved if one is to continue and get to the end of the path.

This continuum captures the *deep* and *wide* nature of the journey toward self-sufficiency. Some clients' education, training, and support service needs will be deeper than others. It also demonstrates the wide nature of self-sufficiency from a client's perspective—that is, the long journey toward "thriving," which could take years for some clients.

Figure 1. The Path to Self-Sufficiency

CAAs, CDCs, CBOs, human service providers

- Outreach/recruitment
- Intake/assessment/ screening
- Assistance with accessing support services
- Refugees/immigrants: immigration and torture counseling

CAAs, CDCs, CBOs, employers, one-stop centers

- ESL, VESL, ABE/GED, pre-vocational/ employment skills training
- Life skills training/ personal success plan development
- Job development/ placement
- Early career planning
- Immigration/naturaliz- ation counseling

CAAs, CDCs, CBOs, employers, bridging to post-secondary education, financial institutions

- Job retention and advance- ment supports,i.e., mentoring, peer support groups, employer contact, skill upgrading, career ladder movement, career planning
- Financial literacy and supports services, i.e., EITC, IDAs, home ownership counseling
- Entrepreneurial training

CAAs, CDCs, CBOs, employers, post-secondary education, financial institutions

- Career advancement supports, i.e., support for licensure, credentialing, and degrees; employer- funded training/OJT; mentoring; peer support groups
- Advanced financial literacy and supports

CAAs, CDCs, CBOs, employers, post-secondary education, financial institutions

- Support on an "as needed" basis only
- Opportunities to "give back" to community, i.e., alumni events, graduate to mentor

Thriving

Stable

Safe

At-Risk

In-Crisis

- No income or assets
- No skills or credentials
- Homeless or unstable housing
- No or unreliable transportation
- No or unreliable child care
- Safety and mental health risks are high

- Seeking job or temp/seasonal job or other legal income
- Seeking GED or vocational training
- Seeking ESL
- Temporary or transitional housing
- Transportation and child care available, but not affordable or reliable

- Employed in semi-stable job
- Has high school diploma, GED, or vocational training
- Housing is not temporary and is affordable (maybe with subsidy)
- Transportation and child care are generally reliable and affordable

- Permanent & stable job
- Career & educational plan in place; active & on-going learning
- Housing is not temporary & is affordable (maybe with subsidy)
- Transportation and child care are reliable and affordable

- Permanent, stable employment of choice
- Implementing education and career plan
- Housing is not temporary & is affordable without subsidy
- Transportation and child care are reliable and affordable

Self-Sufficiency Standard for Massachusetts. In 1997, the Women's Educational and Industrial Union established MassFESS—the Massachusetts Family Economic Self-Sufficiency Project. In conjunction with Wider Opportunities for Women (WOW), Dr. Diana Pearce, and a widespread group of Massachusetts stakeholders, MassFESS developed and released the *Self-Sufficiency Standard for Massachusetts*.[4] This report details how much income working families across Massachusetts need to meet their basic needs without public or private subsidies. In a 2000 report entitled *The Self-Sufficiency Standard: Where Massachusetts Families Stand*,[5] MassFESS calculated how many families have enough income to make ends meet. The report revealed that 25 percent of Massachusetts families earn less than the Self-Sufficiency Standard indicates is necessary.

The Self-Sufficiency Standard for Massachusetts
4 Family Types and 5 Locations (Annual)

Family Type	Boston	Lowell	Worcester	Springfield	North Adams
1 adult Annual Salary	$21,362	$20,144	$16,703	$15,304	$14,583
1 adult, preschool child Annual Salary	$44,046	$39,990	$33,993	$31,471	$29,744
1 adult, 1 preschool, 1 school age child Annual Salary	$51,284	$47,017	$40,598	$36,603	$34,875
2 adults, 1 preschool, 1 school age child Annual Salary	$54,612	$53,206	$46,714	$42,844	$40,909

The Self-Sufficiency Standard for Massachusetts provides a measure that is customized to each family's circumstances, making it possible to determine whether its income is adequate to meet its basic needs. *The Self-Sufficiency Standard for Massachusetts* calculates the bare-minimum costs of housing, child care, food, transportation, health care, miscellaneous (e.g., clothing, shoes, household items, telephone), and federal, state, and local taxes that a working family in Massachusetts faces. *The Self-Sufficiency Standard for Massachusetts* also provides vital information about the way work supports (such as Medicaid, Food Stamps, and child care assistance), lower costs so that families can make ends meet in the short-term while they gain skills and experience to advance to better-paying jobs. The result is a measure set at a level that is neither luxurious—or even comfortable—nor so low that it is insufficient to adequately provide for a family.

With the release of *The Self-Sufficiency Standard for Massachusetts*, the actual costs of meeting a family's basic needs in this state were presented. According to the federal poverty measure, a family of three anywhere in the mainland United States earning above $15,260 is

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[4] Diana Pearce, Ph.D. and Jennifer Brooks, *The Self-Sufficiency Standard for Massachusetts,* 2003. Prepared for the Women's Educational and Industrial Union. Available at http://www.weiu.org/pdf_files/SSSReportOriginal.pdf
[5] Jean Bacon, Ph.D. and Laura Henze Russell, with Diana Pierce, Ph.D. *The Self-Sufficiency Standard: Where Massachusetts Families Stand*. Prepared for the Women's Educational and Industrial Union in collaboration with Wider Opportunities for Women. Available at http://www.weiu.org/pdf_files/WMFSFinalVersion.pdf

deemed to be "not poor." By contrast, *The Self-Sufficiency Standard for Massachusetts* reveals that a single-parent family living in Suffolk County (which includes the City of Boston) with one preschool- and one school-age child requires $51,284 to meet its basic needs without any public or private assistance. In the City of Springfield, the income requirement of a one-parent family with one preschool- and one school-age child is $36,603.

For most Massachusetts families, the income required for self-sufficiency greatly exceeds other common benchmarks of income. Using the City of Boston as an example, a single adult working full-time at the minimum wage ($6.75) would earn $1,477 per month after adding tax credits, putting her just slightly below the federal poverty level ($17,725 annually). However, if she is raising one preschool- and one school-age child, her income would need to be $3,383 per month if she were to achieve self-sufficiency without subsidies or supports; this would leave her with a shortfall of $1,906 per month, or a 56 percent shortfall. The combination of welfare cash assistance and food stamps would amount to about one-quarter (29%) of the Self-Sufficiency Wage.

CAAs/CBOs and Workforce Development

If the goal of workforce development is to assist individuals in moving closer to self-sufficiency and—at the same time—assist firms in meeting their hiring and incumbent worker needs, what is the role for CBOs in this enterprise? Why and how have CBOs been involved in workforce development? Why should all CBOs be involved in workforce development?

• Why CAAs/CBOs Should Be Involved in Workforce Development

There are several reasons that could be used to argue that CBOs should be involved in workforce development either directly or through strategic partnerships.

FIRST, community-based practitioners understand that self-sufficiency is about more than employment and income. Toby Herr and Suzanne L. Wagner—two pioneers in the welfare-to-work world—have articulated the key characteristics of self-sufficient people in a recent white paper issued by their highly regarded organization Project Match in Chicago. In addition to the ability to support themselves and their families, Herr and Wagner assert that self-sufficient people have confidence about the future, believe they can be effective in their lives, and have established their own safety net of resources and relationships to rely on when times get tough.[6] Maurice Lim Miller, co-founder of Asian Neighborhood Design in San Francisco has stressed that self-sufficiency is about choice and control. Lim Miller notes that self-sufficient people have developed knowledge, education, skills, resources, and relationships that allow them choices over what types of jobs they take, where they live, and what lifestyle they enjoy.[7] Practitioners stress that self-sufficient people exert a basic level of control over their lives that is missing in the lives of individuals who have not obtained self-sufficiency. In

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[6] See Herr, T. and Suzanne L. Wagner. 2003. "Self-efficacy as a Welfare-to-Work Goal: Emphasizing Both Psychological and Economics in Program Design." February. Project Match: Chicago, IL. Herr and Wagner stress the need to build self-efficacy supports into welfare-to-work programs. Available at http://www.pmatch.org/self_effic_june_othree.pdf
[7] Interview with Maurice Lim Miller - May 7, 2003.

this respect, self-sufficiency is not simply a reflection of economic independence; it is also reflection of a psychological state.

SECOND, CBOs are in close contact with individuals who are economically disadvantaged and know their basic needs.

THIRD, CBOs currently engage in a very broad set of activities in order to help move people toward self-sufficiency. These organizations provide both *deep* and *wide* supports and services. *Deep* supports and services are comprehensive, covering a host of family basic needs. Many families need a variety of supports in their journey toward self-sufficiency and seek help on multiple fronts. In addition to education and training, services provided may include safety and mental health services, food, housing, transportation, and child care. *Wide* refers to the time frame in which services and supports are provided. For many, the road to self-sufficiency is long and complicated. Stabilizing a family in crisis is often the first step a community-based organization must take. Once stable, families may need other supports, including pre-employment education and training. From here, the focus may shift to job placement and retention, continued skill development and career advancement. Community organizations that promote intergenerational self-sufficiency start even earlier with a focus on children to promote learning and work values that will carry them through school, post-secondary training or education, and career start-up and advancement. Organizations that provide access to both deep and wide supports along the path toward self-sufficiency recognize that self-sufficiency requires much more than a promising entry-level job. These organizations consider the whole person or family and focus equal attention on connecting people to safe and affordable housing, child care, and reliable transportation. Considerable emphasis is also placed on developing supportive social networks and a positive, forward-looking attitude.

> *Organizations that provide access to both deep and wide supports along the path toward self-sufficiency recognize that self-sufficiency requires much more than a promising entry-level job.*

FOURTH, CBOs can benefit greatly from learning what other workforce development organizations are doing in their local communities and from identifying what they bring to the table. For example, several CAAs have information technology (IT) access and IT training programs and they tend to have the connections with and the trust of workers that may be needed by employers.

• Research on CAAs/CBOs Nationally

CBOs cannot only learn from other workforce development organizations, but they may benefit from what their peers have done nationally.

Findings from Survey Conducted for This Guide

As part of the research leading to the development of this Resource Guide, project partners nominated 150 organizations from CBOs from across the country that are involved in workforce development. These 150 organizations were subsequently surveyed. Agencies had to serve populations that are not economically self-sufficient, needed to have specific workforce

development initiatives in place to serve these populations, had to have provided services for a minimum of two years, and needed to have provided some training and education services. In addition, consideration was given to agencies that were involved in economic development efforts. Slightly over 30 organizations responded. After data cleaning and follow-up phone calls, 29 organizations were identified who answered most of the key questions in the survey and 28 who answered all questions of interest.

From the Survey: Respondent Characteristics

- Among respondents, 16 states were represented. Most responses came from Massachusetts (11). Other states represented were Ohio, Missouri, Rhode Island, Pennsylvania, Washington, Florida, Nebraska, Connecticut, Minnesota, New Jersey, Wisconsin, New York, California, Louisiana, and Texas.

- The vast majority of respondents (slightly over 75%) were CAAs. Other respondents included community development corporations, faith-based organizations, other community-based organizations, and an industry-based education and training organization.

- Most agencies that responded were founded in the 1960s. One organization had been in operation since 1909.

- As for staffing, the average number of staff employed was 83.7, but staff size ranged greatly from a low of 3 to a high of 235. The number of volunteers involved ranged from 1 to 1,400.

- On average, respondents served approximately 7,000 clients annually, but the range was 350 to 35,000.

- Budgets ranged from $195,000 to $48 million annually. Most agencies operated using primarily public funding, but 5 to 7 were primarily privately funded.

Organizations used different definitions of self-sufficiency. Most (16) used ROMA to define self-sufficiency, which is consistent with the finding that most respondents are CAAs. Three said they know self-sufficiency when they see it. Three used the Wider Opportunities for Women definition of economic self-sufficiency. The remainder used some variation of existing measures or created their own.

As for uses of a self-sufficiency standard, provision of an overall framework, performance measurement, goal setting, career counseling, and eligibility determination were the prevalent internal uses. External uses were less frequent, overall, with fundraising and advocacy being the more important ones and partnership-building being the application for roughly half of the organizations.

Other ways that respondents have used a self-sufficiency standard include building internal partnerships and using the standard as an outcome measure for a small business program and agreed-upon document for referral to further training.

Half of all respondents indicated they did career ladder work and over two-thirds said they provide career exploration and development assistance to clients, including a process of establishing short- and long-term career goals.

In terms of key outcomes, 65 percent of those who received job placement services were placed in jobs.

All but one organization had relationships with (1) other organizations that provide wrap-around support services (the number of relationships ranged from 1 to 128), and

> **MORE ON SURVEY FINDINGS**
> *For information on the service mix provided by respondent CBOs, see Table 1 in Chapter 4>>*

(2) other community-based education, training, and workforce development providers (and the number of relationships ranged from 1 to 50). Seventy-nine percent of organizations had relationships with employers and the range of employer partnerships was 1 to 410. Eighty-six organizations had relationships with post-secondary educational institutions and the range of organizations involved was 1 to over 25.

One organization indicated it had no relationships with institutions in its local workforce development region. Forty-six percent reported they were on their statewide approved Individual Training Account (ITA) provider list. Forty-three percent had someone serving on a Workforce Investment Board (WIB) or a WIB advisory committee. Seventy-five percent received referrals from One-Stop Career Centers or Service Delivery Area agency. Slightly over half (i.e., 54%) were a core partner for their local One-Stop Career Center, 14 percent operated a One-Stop Career Center, and 28 percent had one or more contracts to provide services for a One-Stop Career Center.

Findings from Literature Review Conducted for This Guide

One of the initial tasks for this project was to conduct a review of the literature on CBOs and workforce development to identify "promising practices" in these organizations for delivering employment, education, training, and "wrap around" support services. Below we present the findings on promising practices from the literature review, organized by the main topic areas of this guide. Details and related tools are provided in other chapters.

Planning for a Workforce Development Program

- *MAKE A COMMITMENT TO ASSISTING CLIENTS WITH CAREER ADVANCEMENT AND SELF-SUFFICIENCY.* Low-income individuals will not reach self-sufficiency through their first low-wage jobs; it will take a series of steps over time along a career ladder before they will reach this point. Organizations aiming to assist people to the goal of achieving self-sufficiency will have to plan to stay involved over the long term. Committing to this is done through mission statements, strategic plans, and staff development.

- *UNDERSTAND THE ORGANIZATION'S ROLE IN THE WORKFORCE DEVELOPMENT SYSTEM THROUGH STRATEGIC PLANS AND COMMUNITY AUDITS.* Assisting people in achieving self-sufficiency is a long-term effort that often requires multiple services and interventions—usually more than one organization can provide. Therefore, strategic and effective organizations know their community resources, who provides what, and how they can best contribute to this community of resources.

- *ESTABLISH A DUAL FOCUS, SERVING BOTH WORKERS AND THEIR EMPLOYERS.* The literature was clear on this point: Effective CBOs know what their worker-clients need and what their employer-clients need regarding workforce development programs and services. This new role for CBOs is challenging, but necessary for success.

- *MAKE SURE THE INTERNAL AGENCY STRUCTURE, ORGANIZATIONAL GOALS, AND FUNDING SOURCES SUPPORT THE VISION OF ASSISTING CLIENTS TOWARD SELF-SUFFICIENCY.* Program and funding "silos" will not work if an organization wants to provide a comprehensive array of long-term, career-building programs and services to clients. Organizations have control over their structure and can change it to better support organizational goals. On the other hand, funding—which often is not structured well to meet the longer-term, more comprehensive program and service needs of those moving from poverty to self-sufficiency—is not an area CBOs have much control over. Nevertheless, those with advocacy power can work to reshape this important resource.

Working with the Workforce Development System and Establishing Partnerships

- *OTHER CBOs ENGAGED IN EMPLOYMENT, EDUCATION, TRAINING, AND WRAP-AROUND SUPPORT SERVICES CAN BE VALUABLE PARTNERS IN THE NETWORK OF SUPPORTS FOR THOSE IN POVERTY.* Most CBOs have partnerships with other similar organizations, but the literature review clearly showed that the best partnerships are those that were formed strategically—the partnership produced added value for all the partners; it was not just a "partnership of convenience"—and were partnerships in action, not just on paper.

- *CBOs WITH A VISION OF CAREER ADVANCEMENT MUST FACTOR IN PARTNERSHIP WITH SOME POST-SECONDARY EDUCATION INSTITUTION IN ORDER TO PROVIDE THE IMPORTANT "NEXT STEP" EDUCATION AND TRAINING OPPORTUNITIES REQUIRED FOR CLIENTS TO MOVE UP IN THEIR CAREERS.* The growing bias toward post-secondary education in this economy means that workers must have some post-secondary education—even a certificate or diploma—in order to earn a wage that supports a family. With increasing rapidity, workers with only a high school education or less are being left behind. CBOs committed to career advancement and self-sufficiency for their clients, must struggle with this challenge.

- *THE DUAL FOCUS ON WORKERS AND EMPLOYERS IS KEY TO MAKING WORKPLACE PROGRAMS WORK.* Self-sufficiency increasingly is realized only after a series of job upgrades, which means CBOs focused on self-sufficiency must work with people both when they are unemployed as well as when they are employed. To work

effectively with and for people currently in the workforce, CBOs must understand their employers' needs, constraints, and challenges. By working through the employers, CBOs will be able to effect change for the workers.

- *EFFECTIVE CBOs TAKE A STRATEGIC POSITION IN THE PUBLIC WORKFORCE DEVELOPMENT SYSTEM BY UNDERSTANDING AND COMMUNICATING THE ROLE(S) THEY CAN PLAY IN IT AND BY BECOMING INVOLVED IN IT.* The public workforce development system encompasses a broad national network of workforce investment boards, One-Stop Career Centers, and other important entities. Although it may be under-funded and in need of improvements, it is the primary "game in town," which means CBOs would be smart to engage with it.

Operating a Workforce Development Program

- *PARTICIPANT RECRUITMENT, ASSESSMENT, AND CASE MANAGEMENT SHOULD BE TAILORED TO THE INDIVIDUAL.* Organizations use a variety of techniques to recruit participants, but the biggest challenge is that each one must "come with a funding stream" in order to pay for the program and services. Unfortunately, most low-income individuals cannot pay for programs and services out-of-pocket, so finding a funding stream to pay for their participation can be challenging. It also is important to assess clients accurately prior to offering programs and services in order to understand their priority challenges and goals. Further, case management should be tailored to client needs—some might need intensive involvement, whereas others need coaching. The bottom line is: Organizations must know their clients to best serve them.

- *JOB PLACEMENT, RETENTION, AND ADVANCEMENT SHOULD BE STRATEGIC, SHOULD START EARLY IN THE PROCESS OF WORKING WITH A CLIENT, AND SHOULD FOCUS ON THE LONGER-TERM REQUIRED FOR CAREER ADVANCEMENT.* The most effective programs started working with clients on career advancement education and strategies even before job placement activities were initiated. They also try to stick with a client as long as possible after they become employed in order to help him/her with career advancement. Of course, short-term funding streams often limit this work.

- *EDUCATION AND TRAINING PROGRAMS SHOULD BE CAREFULLY TAILORED TO THE LOCAL LABOR MARKET NEEDS AND SHOULD MEET THE NEEDS OF THE CBO's DUAL CLIENTS—WORKERS AND EMPLOYERS.* There have been many studies and reports on the most promising practices in delivering education and training programs. The overall findings are too numerous to report in this quick summary, and readers should carefully review the list of important features of these programs provided in Chapter 3.

- *WRAP-AROUND SUPPORT SERVICES OFTEN ARE ESSENTIAL FOR LOW-INCOME ADULTS TO MOVE FROM POVERTY TO SELF-SUFFICIENCY.* CBOs report many barriers to economic success, and they are not limited to inadequate basic skills and low skills levels. They include lack of child care, secure housing, reliable transportation, and other barriers. CBOs across the country know this, and most are

working hard to help their clients with these challenges. One of the keys to success in this work is to partner with other organizations that can help provide these services. A second one is to help clients learn how to access these resources on their own so that, when the funding runs out to serve this person, they can continue to deal with child care crises, housing problems, and other barriers to reaching self-sufficiency on their own. In fact, this is part of assisting them toward self-sufficiency.

- *UNLESS ORGANIZATIONS SET REALISTIC GOALS AND MEASURE THEMSELVES AGAINST THEM REGULARLY, THEY HAVE NO IDEA HOW WELL THEY ARE DOING IN ASSISTING CLIENTS IN THEIR PATH FROM POVERTY TO SELF-SUFFICIENCY.* It is critical for organizations to set goals around helping their clients move to self-sufficiency and to measure themselves against these goals. As this guide substantiates, simply helping someone get a job (i.e., meeting a "job placement" goal) is not enough to reach self-sufficiency. The job must be in a growing industry and must have a clear step to the next job with higher earnings in order for clients to climb out of poverty. Effective organizations set these more rigorous goals and hold themselves accountable for meeting them.

"The Self-Sufficiency Continuum": Highlights from a Recent Report

In summer 2003, the Massachusetts Department of Housing and Community Development (DHCD), the Commonwealth Corporation (CommCorp), FutureWorks, and the Massachusetts Association for Community Action (MASSCAP) released *Do You Know the Way to Self-Sufficiency? A Case Study Report on Using a Self-Sufficiency Framework to Guide Workforce Development Programs and Policies.*[8] This report presented findings from an exploratory research project that investigated how community-based organizations are providing integrated education, training, and support services required to improve the labor market prospects of low-income individuals. This research was motivated by growing awareness among Massachusetts policymakers and practitioners that closer integration between community-based organizations and the state's workforce development system is necessary to move low-income individuals and their families from poverty to economic self-sufficiency.

The exploratory research conducted revealed that *self-sufficiency* is a multifaceted term with economic, social, and political implications. Even when the scope of research is narrowed to *economic* self-sufficiency, there is a tremendous amount to "unpack" and understand.

The case studies and program reviews that resulted from the research provide important information about how CBOs deliver integrated education, training, career, and support services to help families move from poverty to self-sufficiency. The research also highlighted the multiple barriers organizations encounter as they strive to make self-sufficiency a central operating principle.

Key findings from the research are listed below.

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[8] Available at http://www.masscap.org/workforce/fnlstudies9-24-3.pdf

Capacity Building

- *THE RHETORIC OF SELF-SUFFICIENCY IS WELL DEVELOPED BUT THE CAPACITY OF CBOs TO IMPLEMENT THIS APPROACH IS LIMITED.*

Service Mix and Partnerships

- *WRAP-AROUND SUPPORT SERVICES ARE OFTEN AN ESSENTIAL PART OF THE PATH TO SELF-SUFFICIENCY.*

- *STRATEGIC PARTNERSHIPS WITH OTHER PUBLIC AND PRIVATE ORGANIZATIONS UP AND DOWN THE SELF-SUFFICIENCY CONTINUUM ARE KEY.*

- *CAREER LADDER INITIATIVES PROVIDE IMPORTANT LESSONS ABOUT THE APPROPRIATE SERVICE MIX AND STRATEGIC PARTNERSHIPS REQUIRED TO MOVE CLIENTS TOWARD SELF-SUFFICIENCY.*

Funding and Timeframe

- *ACHIEVING SELF-SUFFICIENCY IS A LONG-TERM PROCESS THAT REQUIRES DEEP AND WIDE SUPPORTS.*

- *ORGANIZATIONS THAT HAVE ADOPTED A LONG-TERM, SELF-SUFFICIENCY APPROACH TO WORKING WITH CLIENTS HAVE FUNDED THEIR WORK THROUGH A PATCHWORK OF PRIVATE, PHILANTHROPIC AND STATE FUNDS.*

For many reasons sited throughout the report, the use of a self-sufficiency continuum to organize service delivery is still rare. That said, there appears to be a growing cadre of organizations that use the continuum as a framework for accomplishing their mission.

The implications of the research are that expansion of the proposed approach to long-term poverty alleviation will require many changes. Most importantly, organizations may need to change the way they are structured so they can create and sustain strategic partnerships with other purveyors of key services. These partnerships are the foundation for weaving disparate supports into a comprehensive package that creates forward motion and possibility for the individual. Career ladder initiatives have allowed for the incubation of successful program designs that, over time, can favorably impact an individual's ability to increase skills, credentials, work experience, and wages. These initiatives provide important models for how the self-sufficiency approach might move to scale.

• Research on CAAs in Massachusetts: Workforce Development Activities

Brief Profile of the CAA Network in Massachusetts

The Massachusetts Association of Community Action Programs (MASSCAP) is a statewide association of the 25 Community Action Agencies (CAAs) operating in Massachusetts. MASSCAP works with the Massachusetts Department of Housing and Community Development and other state agencies to promote self-sufficiency for low-income residents.

The CAAs help hundreds of thousands of Massachusetts residents meet their basic needs and achieve self-sufficiency. In addition, CAAs play a major role in the economic well-being of local communities, providing jobs for residents and contracts to local businesses. The CAAs themselves are economic engines, providing communities with an annual infusion of over $250 million in total resources. Further, the CAAs generate twice that amount by helping clients become self-sufficient and productive.

Each of the CAAs is anchored in the community by a Board of Directors made up in equal parts by low-income people, members of the business community, and local public officials. The Board of Directors sets the goals and policies for each CAA.

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Massachusetts CAA Highlights

- Serve over 250,000 families.
- Serve almost 500,000 individuals.
- Employ over 4,000 people.
- Work with several thousand volunteers who provide over 500,000 hours of support.
- Grant over 6,000 contracts to local vendors worth more than $50 million.

For other aggregate data on Massachusetts CAAs, see the *FY2002 Performance Measures Report* on the DHCD web site at http://www.mass.gov/dhcd/components/cs/ 1PrgApps/CSBG/ default.HTM#Additional_ Program_Information

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CAAs in Massachusetts provide basic support and training services. Each operates an average of 12 to 15 programs, and these typically include several of the following:

- GED and English as a second language (ESL) education
- Job training
- Head Start and day care
- Low-income home energy assistance programs (fuel assistance)
- Weatherization assistance programs
- Homelessness prevention programs
- Health services
- Senior services (e.g., Foster Grandparent Program, Retired Senior Volunteer Program)
- Temporary emergency food assistance programs
- Affordable housing creation and renovation
- Micro-enterprise and small business creation

Selected Workforce Development Activities of CAAs in Massachusetts

Skills Training
- Computer Skills for Employment (banking/finance sectors)
- English for Employment (ESOL with work experience and basic office skills)
- First Steps into Child Care Careers
- Certified Nursing Assistant (CNA) Training
- Energy Conservation Training Program

Child Care Provider Training
- Child Care Focus – professional development
- Child Care Teacher Training (internships)
- Child Care Provider Training

Adult Literacy
- DOE programs
- Pathways to College
- Urban College
- EvenStart
- ESL, ABE, Pre-GED, GED prep, Citizenship
- Workplace Literacy

Youth
- SummerWorks (employment)
- Alternative High School
- CityWorks
- Youth GED Prep
- Project Excel (GED for drop-outs)
- WINGS (GED plus employment).
- YouthWorks
- YouthBuild
- CareerLink (ages 17-23)
- SuccessLink (ages 12-22)

Computer Labs
- Computer Literacy
- Learning Links Tech Center

Highlights from a 1999 Report

In 1999, MASSCAP surveyed the state's 25 CAAs to collect information for a Workforce Development Initiative focused on developing a strategic agenda on this topic. The survey identified the following critical aspects of workforce development based on the experience of the member agencies (as detailed in the project report *Summary of Findings and Recommendations of the 1999 Final Report on the MASSCAP Workforce Development Initiative*).[9]

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[9] Available at http://www.masscap.org/reports/wiap-1.html

- *Advocacy versus Service Delivery.* CAAs need to carefully and continually prioritize across these two areas. Ultimately it is a question of how to carry on both effectively.

- *Provision of Wrap-Around Support Services.* Support services are critical to the success of education, training, and employment services. The value of CAAs as major providers of support services is not sufficiently recognized within the workforce development arena.

- *Paying Attention to Workforce Development Customers.* Considerable attention must be given to thinking about "who the customer is" for CAAs starting, maintaining, and growing workforce development services.

- *Strategic Analysis of the Workforce Development Landscape.* It is important to learn about the workforce development landscape.

- *Strategic Analysis of Organizational Issues.* Considerable emphasis must be focused on how CAAs should tackle workforce development.

The survey report concluded with recommended action steps and strategies organized under five key themes:

- The state of the labor market matters, perhaps more than any other single factor.

- Building relationships with employer and jobseeker customers is the most important factor over which CAAs have control.

- It is essential to be strategic and to align overall organizational objectives and components with the workforce development vision and goals.

- Both public and private workforce development is a growing business and the focus of much recent attention in legislation and public policy.

- Each CAA must focus on its own communities, local system and stakeholders, and particular organizational context; but there must also be a statewide platform and strategic agenda in order for CAAs to begin to realize their potential role in workforce development.

Planning for Workforce Development

⊶ *Key guidance in this section:*
☑ Determining the organizational role.
☑ Considerations for strategic planning.
☑ Promising funding strategies.
☑ Resources.

Getting Started

• Organizational Commitment

Given the "work first" employment policies and practices of public assistance programs, Community Action Agencies (CAAs) and other community-based organizations (CBOs) are under considerable pressure to find jobs quickly for unemployed individuals in their target populations. At the same time, organizations need to consider the need for individuals to go beyond dead-end jobs and to be striving toward work with opportunities for advancement and the ability to earn family-sustaining wages.

For many CBOs, addressing workforce development in the context of moving individuals toward self-sufficiency may represent a new focus. Nonetheless, in recent years some CBOs have established goals that specifically focus on workforce development in this context. (See the Background and Context chapter of this guide.)

The work of CBOs in workforce development can involve various roles and activities:

- Acting as job brokers in connecting low-income individuals with jobs.

- Offering basic skills education, job training, career management training and services, and other vital employment services.

- Conducting initial recruitment and screening of job candidates, researching and providing workplace training, and assisting employees with continual skills development and career advancement.

- Advocating for low-income families by working to change workforce development and related policies to improve the likelihood of their progressing toward self-sufficiency.

CBOs thinking about getting involved in workforce development or strengthening their current involvement are advised to base their decisions on careful strategic planning.

The sections that follow address various aspects of strategic planning that support making a determination about the appropriate role for the particular CBO within the local workforce development system. The final section of the chapter addresses innovative funding strategies already in use.

Conducting Strategic Planning

• Introduction

Strategic planning for participation in workforce development calls for conducting a realistic assessment of your organization's strengths, opportunities, weaknesses, and threats. Doing this effectively at the outset can help an organization determine its appropriate role in the local or regional workforce development landscape. Although strategic planning sessions require time and commitment, most organizations find it necessary to reconsider their strategic plan every one to two years. The benefit of regularly reassessing strategies is that—because the labor market changes quickly—organizations need to stay current on any development that might impact their role in the system.

• Setting Organizational Goals

Part of regular strategic planning for any organization is setting process and outcome goals. Although many of these goals will focus on themes discussed in the next two chapters of this guide on establishing strategic external partnerships and providing the appropriate mix of programs and services, it is important to establish goals specific to the management of the organization. For example, it is important to set goals for staff development, fundraising, marketing of the organization, and other organizational management functions. Writing them down and posting them increases the likelihood that they will be prioritized.

When the organizational goals have at least some staff input, they become "our goals" and elicit more buy-in and support.

This does not have to be a complex process. One organization we reviewed first completes a strategic-planning-process step in which it reviews the organization's strengths, weaknesses, opportunities, and threats (a so-called SWOT analysis). Once it understands these constraints and opportunities, it convenes a small group meeting with upper management staff to brainstorm five to six key priority areas for the next two years. The results of the SWOT analysis and the goals brainstorming are shared with board members to get their feedback and buy in. From there, upper management shares the goals with staff and begins to assess

appropriate objectives and outcomes for each goal. An excerpt of the final document looks something like this:

Goal	Objective	Outcome	Timeline	Person Responsible
Goal 1	*Objective A*	*Includes both "process" and "impact" outcomes. Process outcomes include that a certain activity will be accomplished to help meet the objective(e.g., 100 percent of clients will have a career management plan in place). Impact outcomes are the "bottom line" results (e.g., 85 percent of clients will be placed in jobs).*	*"Due date" for when the outcome is expected.*	*Person who is responsible for facilitating and tracking progress on the outcome; usually someone from upper management.*
	Objective B	*"*	*"*	*"*

No matter how an organization documents its goals, it is important for staff—from front-line to upper management—to be involved in the process. This is true for two reasons:

- Staff have varying perspectives on the organization and what it does well. The only way to get a full understanding of the organization is to combine different perspectives.

- Involving all staff in the organizational goals-setting process is an important way to build buy-in and staff motivation. When the organizational goals are established by management, they are "their" goals and have less meaning and motivational pull for staff. However, when the organizational goals have at least some staff input, they become "our goals" and elicit more buy-in and support.

• Resources

There are numerous useful resources on strategic planning for CBOs interested in initiating or improving workforce development services. The http://www.workforceUSA.net web site (http://www.workforceusa.net/home/index.cfm), for instance, provides access to several useful general resources for strategic planning, including:

- *STRATEGIC PLANNING PROCESS: STEPS IN DEVELOPING STRATEGIC PLANS* Diane Schilder, Harvard Family Research Project. This brief article provides a definition of strategic planning, describes strategic planning components, provides lessons learned information from state practices, and highlights other resources. (http://www.gse.harvard.edu/hfrp/pubs/onlinepubs/rrb/strategic.html)

- *STRATEGIC PLANNING IN NONPROFIT OR FOR-PROFIT ORGANIZATIONS* Carter McNamara, The Management Assistance Program for Nonprofits. This resource is a combination online guidebook to strategic planning and a web portal to a wide variety of resources on the subject. (http://www.mapnp.org/library/plan_dec/str_plan/str_plan.htm)

The following resource is more specific to workforce development, with a particular emphasis on coordinating with Workforce Investment Boards:

- *PRACTICAL STRATEGIC PLANNING FOR WORKFORCE BOARDS*
  Commonwealth Corporation. (2001, 31 pages). This guide for Workforce Boards contains very simple, practical steps for setting strategic goals. (Available for nominal cost from the Commonwealth Corporation, The Schrafft Center, 529 Main Street, Suite 110, Boston, MA 02129, (617) 727-8158.)

CBOs with an interest in creating or participating in career ladder initiatives for low-wage workers may find the community assessment and planning sections of the following how-to manual particularly useful. (A career ladder is a system of strategies and efforts that enable workers to plan their futures, increase skills, learn English, and gain further credentials.)

- *BUILDING CAREER LADDERS FOR LOW-WAGE WORKERS: A HOW-TO MANUAL FOR WORKFORCE DEVELOPMENT PRACTITIONERS AND PARTNERS*
  The Boston Workforce Development Coalition. This 2003 publication authored by Green, C, Griffen S., and Sheridan L. can be purchased from the coalition, 165 Brookside Avenue, Jamaica Plain, MA 02130, (617) 522-6028.

Massachusetts CBOs interested in offering new or expanded adult basic education services should consult the following resource from the Massachusetts Department of Education. This guidance document also may be informative for CBOs operating in other states:

- *THE MASSACHUSETTS DEPARTMENT OF EDUCATION ADULT BASIC EDUCATION COMMUNITY PLANNING PROCESS: STRATEGIC PLANNING GUIDE*
  (http://www.doe.mass.edu/acls/news/2003/community/spguide.pdf).

Also, for Massachusetts CAAs, an extensive guide has been developed by the state's Department of Housing and Community Development (DHCD) to assist agencies with their strategic planning process, which should be conducted every three years. In particular, the guide includes: model internal and external needs assessment instruments, such as community need surveys; model fundraising strategies; and linkages models. The original guide corresponds to fiscal years 2003, 2004, and 2005. DHCD is in the process of developing the tool for the next three years. See http://www.mass.gov/dhcd/ components/ cs/1PrgApps/CSBG/default.HTM#Additional_Program_Information.

Using Data from a Community Audit

A community audit in the workforce development context identifies the needs, resources, and gaps in the local workforce development system. Conducting or participating in a community audit as part of the strategic planning process can help CBOs make informed decisions about how to change the way they do business and position themselves appropriately in the local workforce development system.

A useful guidance document on community audits is:

- *CONDUCTING A COMMUNITY AUDIT: ASSESSING THE WORKFORCE DEVELOPMENT NEEDS AND RESOURCES OF YOUR COMMUNITY*
  Barbara Baran and Suzanne Teegarden, Workforce Learning Strategies (2000, 61 pages). (http://www.workforceatm.org/sections/pdf/2003/condanaudit.pdf)

Another useful resource, particularly for CAAs in Massachusetts is:

- *THE MASSACHUSETTS DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT'S CSBG COMMUNITY ACTION PLAN DEVELOPMENT GUIDE.* (http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/default.HTM#Additional_Program_Information)

Focusing on Both the Target Community and Employers

Changes in the structure of the workforce and in public workforce development funding and programming have meant that CBOs must re-evaluate their programs in terms of both their target populations and prospective employers. Unlike in the past, workers now must anticipate the likelihood of frequent career shifts and recognize that there may be fewer opportunities for career development from a single employer. Instead of simply knowing how to get and keep a job, workers will have to know how to manage their own continued education and skill development.

Thus, if CBOs are to effectively assist people in moving from poverty to self-sufficiency, they will need to provide or establish linkages to more than basic education, short-term skills training, and job placement. Workers need services that support job retention, career management, and connections to post-secondary education.

Further, CBOs involved in workforce development must be willing to adopt a dual-customer approach, in which they simultaneously serve employers and individual job seekers. CBOs focusing their workforce development programs on helping individuals achieve self-sufficiency know that employers play a key role in worker retention and advancement.

More information on how CBOs can enhance their coordination with employers can be found in two useful documents:

- *WORKFORCE INTERMEDIARIES FOR THE TWENTY-FIRST CENTURY*
  Robert P. Giloth, editor. Published in association with The American Assembly at Columbia University, 2004.

- *RESPONDING TO A CHANGING LABOR MARKET: THE CHALLENGES FOR COMMUNITY-BASED ORGANIZATIONS*
  Peter Plastrik of Integral Assets, Inc. with Judith Combes Taylor of Jobs for the Future (JFF), 2001.

In addition, the experience of organizations surveyed in preparation for the development of this guide are of note, since they reflect the extent to which workforce development programs are taking on a dual-customer focus. Nearly 80 percent of CBOs responding to the survey have close affiliations with *employers*, with some CBOs coordinating with 50 or more firms in their local area. Reasons for teaming with employers include the following:

- Obtain knowledge about the local labor market and identify specific education, training, and employment services needed.

- Identify employer supports and resources to better connect job seekers to these opportunities and resources.

- Identify opportunities to provide education and training to incumbent workers.

- Obtain employer input in curriculum development.

- Enlist the participation of employers on workforce development boards and/or advisory committees.

Examining Internal Agency Structure

• Opportunities for Fine-Tuning

One of the most overlooked aspects of becoming a more effective workforce development agency is evaluating the structure of the organization. The question to ask is: "Does the structure of this organization fit its mission, goals, and role in the local workforce development system?" Often, programs are organized into "silos," arranged according to funding sources. For example, organizations frequently have similar job developers, employment specialists, case managers, and other staff scattered across "the welfare to work" unit, "the unit that serves persons with disabilities," "the youth unit," etc. Not only is this duplication of staff functions inefficient, it does not support the new roles CBOs must play in workforce development to effectively assist individuals in moving to self-sufficiency. Additionally, most organizations are not structurally organized to take on the dual-customer approach of serving employers in addition to their traditional individual job-seeker clients.

"Does the structure of this organization fit its mission, goals, and role in the local workforce development system?"

Strategic CBOs take a hard look at their internal structure to assess whether it is best suited to meeting the demand of the new workplace and new customers. For example, some have established an Employer Relations Manager to work specifically with employers. This person is familiar with business culture, language, and how to assess business needs. His or her role is specifically to identify employers with whom the agency wants to place clients (ideally, those with decent entry-level wages, benefits, and career advancement potential) and to develop

relationships with those employers to develop and deliver workplace education and other customized services the employer needs, while enhancing career advancement opportunities within the workplace.

Two case-study publications provide valuable information on how workforce development CBOs have restructured their organizations to better meet workforce development needs:

- *FIXING A FLAT AT 65 MPH: RESTRUCTURING SERVICES TO IMPROVE PROGRAM PERFORMANCE IN WORKFORCE DEVELOPMENT*
  Mae Watson Grote at Public/Private Ventures, 2003. This case study considers the Metropolitan Career Center, Jewish Vocational Service (Boston), and the Center for Employment Opportunities. See http://www.ppv.org/pdffiles/changingflat.pdf

- *ABOVE AND BEYOND THE CALL OF DUTY: A CASE STUDY*
  Workforce Learning Strategies, 2004. This study also looks at Jewish Vocational Service (Boston). See http://www.workforceusa.net/uploads/CaseStudyfinal2.pdf

Establishing a more effective organizational structure and adding new staff for new functions are important considerations for CBOs seeking to improve their workforce development programs and services. Again, there is no "hard" research on the best structures and is no single model to emulate. However, once a CBO determines its appropriate role within the local or regional workforce development landscape, the organization should not hesitate to evaluate its internal agency structure and ask hard questions about whether it is supporting the work of the agency as well as possible.

Other promising practices for the internal management of workforce development CBOs come from a report by the Council for Adult and Experiential Learning (CAEL). In her report, *Managing Non-Profits in Workforce Development: A Roadmap to Success*, Rebecca Klein-Collins provides four criteria for the internal management of effective organizations. The criteria (ten in total) are based on a study of sixteen workforce development and micro-enterprise grantees of the Levi Strauss Foundation by CAEL. The criteria on internal management include:

- *Applying performance data to enhance organizational effectiveness:* Using data for strategic planning, continuous improvement, reporting to funders and the public, general public education, labor market analysis, and staff motivation.

- *Committing to organizational change and adaptation:* Being responsive to labor market and workforce development changes.[11]

- *Valuing the expertise and contributions of staff:* Spending time and money to invest in quality staff and in providing meaningful staff development.

- *Exercising financial acumen:* Raising/leveraging funds; strategically managing existing funds; and operating the organization like a business.

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[11] This theme is echoed in the 2001 Jobs for the Future report, *Responding to a Changing Labor Market: The Challenges for Community-Based Organizations*, by Plastik and Combes Taylor.

These are only the highlights from this report. Klein-Collins provides numerous examples from the sixteen grantees of successful practices in each of these areas. Readers should consult the report for more information.[12]

- ## Research Findings on Agency Structure

Findings from our recent survey of CBOs indicate that agencies can and do organize themselves in different ways as they position themselves for providing workforce development services. While some organizations use a blend of organizational structures, roughly one third of the organizations we surveyed use workforce development funding sources as their organizing principle. In other words, they create divisions or units by funding source or program. Examples of agencies that do this are Action, Inc., Adirondack Community Action Programs, Inc., and the Asian American Civic Association (see case studies in Chapter 3 of this guide). Over two-thirds organize themselves by functional area (e.g., case management), for which the Minnesota Valley Action Council is an example. Some organize themselves by clientele or population (e.g., youth versus adults) and a small percentage by location or some other method. To facilitate communication between different divisions, the vast majority of organizations prefer to rely on staff as the major communication channel.

According to the survey findings, most organizations tend to develop workforce development delivery capacity by attracting staff with necessary qualifications. When hiring staff for workforce development programs, specific skills sets (e.g., relevant to training area), strong communication skills, bilingualism, computer literacy, and related work experience appear important, with related work experience being of only moderate relevance.

Leveraging Funding Strategies

- ## Current Environment

It is a stark reality that, just as workers and their employers need more workforce development supports, public funding for workforce development is shrinking. Federal and state funding of workforce development does not even cover education and skills training or job placement activities, much less expanded services for individuals such as career management and advancement or services for entirely new customers such as employers. However, there are some bright spots:

- Most public workforce development programs require regular intervals of follow-up after job placement, often up to six months. Although it is clear to CBO providers that this simply is not a long enough period, it is a step in the right direction.

- Some state workforce development programs are beginning to recognize the importance of longer-term worker support and the dual-customer approach. For

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[12] CAEL report by Rebecca Klein-Collins. (Available at http://www.cael.org/publications_research_ whitepapers.htm).

example, the Commonwealth of Massachusetts has supported a health care career ladder initiative for the past four years (see below).

• Highlights of Promising Programs

The program highlights below capture some innovations and promising approaches to funding longer-term support for worker development. (Although these examples are about CBOs in Massachusetts, there are likely to be similarly promising example programs elsewhere in the country. Aspects of these examples may be informative regardless of specific location.)

THE MASSACHUSETTS EXTENDED CARE CAREER LADDER INITIATIVE (ECCLI)
As part of the broader Nursing Home Quality Initiative, ECCLI seeks to improve the quality of long-term care in Massachusetts and stabilize the long-term care workforce. Integral to this is ECCLI's creation of opportunities for skills development and career and wage advancement for direct-care workers. ECCLI also supports the establishment of career ladders in long-term care facilities and home-based care agencies. The employer presents workers with one or more ways to advance, and then helps to make it possible for employees to take these steps. The employee, in turn, has an opportunity to increase his or her skill set and achieve career advancement. As a result, employees are more likely to retain jobs, resulting in improvements in the quality of long-term care. Through this initiative, Commonwealth Corporation (a collaborator on this guide) has made grants to over 80 long-term care providers in Massachusetts to help them address the ongoing problems of high employee turnover and chronic worker shortages. Using ECCLI, long-term care facilities have discovered an efficient way to control costs and increase worker productivity. ECCLI has also presented a very effective way to revitalize the nursing home culture and introduce innovative methods to increase the quality of life for resident elders. (For more information, see: http://www.commcorp.org/cwi/programs/eccli/index.html.)

THE BUILDING ESSENTIAL SKILLS THROUGH TRAINING (BEST) INITIATIVE
Massachusetts implemented the BEST initiative in 2002. BEST was specifically focused on working closely with employers to deliver on-site workplace foundational skills training and career ladder development and support. According to state officials, BEST has had a positive effect on subsequent funding opportunities in strengthening the focus on job retention, career advancement, and employer customers. (For more information, see: http://www.commcorp.org/cwi/programs/best/index.html

ASIAN AMERICAN CIVIC ASSOCIATION (AACA)
Although foundations have recently cut back on levels of financial support due to poor stock performances, some organizations have been able to "seed" innovative workforce development efforts through funding from such benefactors. The CBO AACA in Boston is an example. AACA's mission is to assist Asian newcomers to achieve the necessary adjustments through a wide range of social services, including: immigration counseling; housing; counseling; employment counseling and job placement; college counseling; family and individual counseling to overcome problems related to social and emotional adjustment to a

> **MORE ON AACA PROGRAMS**
> *See the complete case study on AACA at the end of Chapter 3>>*

new country; social security and financial counseling assistance; fuel assistance counseling, translation and interpretation; information and referral; and tax preparation assistance.

This organization has recently engaged in a strategic planning process and developed a five-year plan to expand AACA's service level to fill service gaps in the Asian Community. It also has received a grant from the Rockefeller Foundation to assess and expand its workforce capacity. This grant allows AACA to examine its goals and objectives in workforce development and to create a comprehensive structure to provide workforce development services to the Asian community for the next five years. One of the tools that emerged from this strategic planning and capacity work is a "Vision to AACA's Workforce Development Strategy for the New Millennium." This tool mirrors the "Path to Self-Sufficiency" model presented in this Resource Guide. As this organization's continuum matures, it may be a promising model for other CBOs serving immigrants and refugees throughout the process of moving toward self-sufficiency. Recently, the agency secured a grant in conjunction with two other CBOs to develop a career ladder program for the automotive industry.

ACTION FOR BOSTON COMMUNITY DEVELOPMENT (ABCD)/FINANCIAL SERVICES ACADEMY (FSA)-NEW ENGLAND COLLEGE OF FINANCE (NECF)

A unique collaborative enterprise has been established between ABCD, the Financial Services Academy at NECF, and member companies in the financial services industry in Boston. ABCD is responsible for the recruitment, screening/ assessment, and basic skills training or students. Initially

> **MORE ON THIS PROGRAM**
> *See the complete case study on the ABCD/FSA-NECF program at the end of Chapter 3>>*

through FSA and eventually through firm-supported incumbent worker education and training opportunities, a pathway to self-sufficiency and prosperity has been supported.

• Research Findings on Funding Strategies

The survey conducted in conjunction with development of this guide found that, overall, resources/budgets of the respondent organizations tended to vary greatly by agency size from less than $200,000 to over $48 million. In terms of funding mix, half of the organizations reported public funding represented 70 percent or more of their annual operating budgets. Some organizations, however, depended greatly on private funding. Approximately 10 percent indicated their private funding share was 85 percent or more.

Our survey provided respondents with a list of possible funding sources for workforce development activities and asked them to identify which ones they used and how much funding they received. The findings included the following:

- Slightly over 40 percent of respondents indicated they use WIA Title I funding.

- While more organizations indicated they were operating adult basic education programs, only 11 percent indicated they use WIA Title II funding to support these services. This low percentage may be a function of the fact that respondents may not have been aware that WIA Title II is the funding source. Since they get these funds from their state education agency, they may not have recognized this federal source as one that supports their work.

- A similar percentage reported using Community Services Block Grant funds for workforce development activities.

- Roughly one third said they received either federal Temporary Assistance to Needy Families (TANF) Program or Welfare-to-Work funds. Half indicated they used some other federal funding source.

- Almost 60 percent stated they receive workforce development funds from some kind of state funding source.

- 43 percent of respondents reported they receive corporate grants, and 18 percent reported they receive other forms of employer support.

- While difficult to interpret and distinguish from other types of previously listed forms of private support, slightly less than one third reported fee-for-service as a source of support for workforce development services.

How can and do Massachusetts CAAs fund workforce development services?

Core funding for CAAs comes from the federal Community Services Block Grant (CSBG) program. CSBG funds are allocated to the state's housing agency and then distributed to each CAA. CSBG enables CAAs to implement a variety of support services, programs to promote self-sufficiency, and training in advocacy skills. CAAs also receive funds from other federal sources, the state, and private contributors. A large portion of these resources are leveraged by CSBG funds. CAAs are also among the most cost-effective and innovative service and training agencies in the state. The recent survey conducted for development of this guide confirms these sources of funding.

Also, a 1999 survey of workforce development efforts in Massachusetts by the Massachusetts Association for Community Action[1] indicated that CAAs used the following sources to fund workforce development activities:

- Job Training Partnership Act (JTPA, now the Workforce Investment Act) Title II funds for the economically disadvantaged (mostly for youth).

- JTPA Title III funds for dislocated workers.

- Employment Services Program funds available through the Department of Transitional Assistance.

- Targeted Assistance Grant funds through the Massachusetts Office of Immigrants and Refugees.

- (Federal) Welfare-to-Work funds.

- Adult Basic Education and Even Start funds via the Department of Education.

In 2004, Welfare-to-Work or Targeted Assistance Grants were no longer available. About the same number of CAAs have Department of Education funding, a few seem to have Department of Transitional Assistance funding for young parent programs, and there are still a handful with Title I youth funding. CAAs were not large suppliers of skill-training courses in 2004 (with the exception of ABCD), and so the transition to Individual Training Accounts (ITAs) under WIA Title I probably did not have a dramatic effect on this group of CAAs. Rather, CAA are an established provider of wrap-around supports.

To put this information in a broader funding context, CAAs can consult the various types of federal and state funding sources available for local workforce development service delivery in Massachusetts in Commonwealth Corporation's annual edition of the Workforce Investment Profiles at: http://commcorp.org/cre/documents/WIPResources.pdf.

Working with the Workforce Development System and Establishing Partnerships

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⊶ *Key guidance in this section:*

        ☑ Configurations of partnerships.
        ☑ How best to partner with employers.
        ☑ Types of arrangements between partners.
        ☑ Promising and effective practices.
        ☑ Resources.

Taking an Expansive Approach

The "workforce development system" is typically viewed in one of two ways. Either it is regarded as strictly encompassing public agencies, partners, and funding streams to include government agencies associated with the federal Workforce Investment Act (WIA), some aspects of the federal Temporary Assistance to Needy Families (TANF) Program, vocational education, and state-funded workforce development entities. Or, it is considered to broadly encompasses these institutions along with Community Action Agencies (CAAs) and other community-based organizations (CBOs) that are involved in education, training, and wrap-around support services as well as post-secondary educational institutions, especially community colleges, and employers. In this guide, we take the broader view of workforce development, recognizing that in most cases no single organization can do it all and thus multiple organizations and agencies must work in coordination through partnerships and other arrangements.

It is important to remember, however, that more is not always better. Effective organizations engage in *strategic* partnerships, establishing relationships with organizations, agencies, and employers in ways that promise to help address the needs of the organization's target populations and to further internal goals. This concept underpins key criteria for organizations that are charting integration with the workforce development system (see text box) as articulated in a study by the Council on Adult and Experiential Learning (CAEL), *Managing Non-*

Profits in Workforce Development: A Roadmap to Success.[13] In developing this framework for organizational effectiveness in workforce development, CAEL drew on its 30 years of experience as a national nonprofit working to remove policy and organizational barriers to adult learning opportunities.

In a survey conducted in conjunction with development of this guide, nearly all respondents indicated that they are involved in workforce development programs that operate in coordination with key stakeholders. The survey found that 79 percent of respondents work with employers, 86 percent have a connection to a post-secondary educational institution, and 43 percent are represented on a Workforce Investment Board (WIB) or a WIB advisory committee.

The specifics of what types of relationships work best for which types of partners are discussed in the this chapter.

> **CAEL Roadmap for Organizational Effectiveness Criteria 3-6**
>
> ***External Relations...***
> 3. Displaying cultural competence
> 4. Engaging in strategic collaboration
> 5. Cultivating relationships with the Public Sector
> 6. Maintaining a Solid Reputation in the Community

Working Strategically within the System

CBOs are generally adept at establishing partnerships, especially in terms of creating linkages with similar types of organizations. Indeed, the partnership concept is built into the CAA national goals structure. One of the six overarching goals is to "achieve and strengthen community partnerships to help low-income people toward self-sufficiency." In our survey for this project, we found that all but one CBO works with other organizations that provide wrap-around support services or with those involved in community-based education, training, and workforce development support.

Typically CBOs rely on a variety of arrangements in establishing partnerships. Some are based on specific, contractual agreements; for instance, involving the number of referrals for services organizations should make. Others are informal, information-sharing linkages, in which organizations provide coordination during scheduled sessions and at topic-specific gatherings. Even for informal arrangements, it can be useful to draw up a Memorandum of Understanding (MOU) between partners so that each organization clearly understands its own and the partner's roles and responsibilities. Such a document—often just a simple, one-page description of the relationship—can strengthen partnerships by setting clear expectations and establishing a process for communicating them.

> ☞ ***BEST PRACTICE HIGHLIGHT***
>
> A wide variety of community-based partners and organizations complete the Financial Services Academy Partnership. These partners attend board meetings and regularly screen and refer clients to the FSA.
>
> *--from the ABCD-FSA-NECF*

An important component of the workforce development system is represented by the publicly funded Workforce Investment Boards (WIBs). Many CBOs already recognize that the WIBs provide valuable opportunities for partnerships focused on connecting workers with jobs in established and emerging industries. A survey of Massachusetts CAAs in 1999 found

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[13] CAEL report by Rebecca Klein-Collins. (Available at http://www.cael.org/publications_research_whitepapers.htm.)

that two-thirds of the agencies operating in the state were represented on the similarly established Regional Employment Boards. Our research indicates that currently, nearly all WIBs in Massachusetts include representation from one or more CAAs. WIBs are generally required to work in conjunction with CBOs, and some more specific requirements relate to CBO programs operating with Community Services Block Grant (CSBG) funding.

Workforce Investment Board "blueprints" are developed to help members of the regional training system better understand the local labor market and to identify opportunities for local workers.

The WIBs are charged with conducting regular studies (or "blueprints") on the labor market in their respective regions. The WIB blueprints are developed to help members of the regional training system better understand the local labor market and to identify opportunities for local workers to make connections with the needs of businesses in regionally important industries. A useful example of a WIB blueprint is the one published in the fall of 2003 by the Merrimack Valley WIB in northeast Massachusetts. (Available at http://www.mvwib.org/resources/ default.php.) In less than a year, the Merrimack Valley WIB's blueprint influenced the course offerings of the local community college and shaped the framework for WIA funding priorities in the region. (See also, for example, the annual report prepared by New York City WIB. Available at http://workforcenewyork.org./ annualreport02/annualreport02nyc.pdf.)

A complete list of WIBs in every state can be found at the National Association of Workforce Boards web site at http://www.nawb.org/asp/wibdir.asp. The Best Practices Vignettes at the end of this chapter highlight several CBO-WIB coordination arrangements.

In the research conducted for this project, it became clear that CBOs involved in helping individuals obtain family-sustaining work position themselves strategically in the workforce development system. Their experiences reveal a variety of established roles for CBOs involved in workforce development:

- 43 percent had representation on a WIB or a WIB advisory committee.

- 75 percent were accepting referrals from One-Stop Career Centers or a Service Delivery Area (SDA) agency, funded under the Job Training Partnership Act.

- Over 50 percent were operating as a core partner for their local One-Stop Career Center.

- 14 percent operated a One-Stop Career Center.

- 28 percent had one or more contracts to provide services for a One-Stop Career Center.

- 46 percent reported they were on their statewide approved Individual Training Accounts (ITAs) provider list, allowing them to accept ITA vouchers for training for adults and dislocated workers under the Workforce Investment Act.

Working with Post-Secondary Education Institutions

Post-secondary education institutions, especially community colleges, are rapidly becoming vital workforce development CBO partners in many communities. This is for two reasons. First, there is a growing premium on worker education and skills in the workforce due to technological advances in the workplace and changes in the way companies do business. Research clearly shows the bias toward higher education.

In 2002, the median work income for year-round, full-time workers 25 years and older without a high school diploma was $22,584, and $29,800 with a high school diploma. It was $35,505 for workers with some college but no degree, $36,784 for workers with an associate degree, $48,896 for workers with a bachelor's degree, and even higher for advanced degrees.[14] Unlike the workforce of the past, today and tomorrow's workforce cannot rely on a strong back and good work ethic to earn a family-sustaining wage.

Community Colleges are the next-step institutions for low-wage workers after they complete... short-term job training at CBOs involved in workforce development.

In order to become and remain competitive in the workforce, workers must attain some level of post-secondary education. This does not necessarily mean earning a bachelor's degree or even as associate degree. A certificate in the right industry can propel a low-wage worker to the middle class.[15] The key is familiarity with the labor market and access to an educational pathway that includes a certificate and other post-secondary education options.

This leads to the second reason community colleges are becoming more and more important in the education of low-income workers: They are a vital part of building career ladder pathways for working adults. Community colleges are the core public institution for education and training in the United States. They are the next-step institutions for low-wage workers after they complete English language and basic education and short-term job training at CBOs involved in workforce development.

For these two reasons, partnerships with community colleges are vital, if not always natural. Despite sharing similar missions—to serve community residents—the culture, language, structure, and drive of community colleges and CBOs is very different. Yet, the two can find common ground in partnerships. Lessons learned from nascent partnerships include the importance of understanding each others' priorities, focusing on particular offerings (e.g., by the CBO working with a specific department or local branch of the community college), and, above all, partnering around something concrete that promises to bear fruit for both partners.

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[14] Source: Bureau of the Census, Bureau of Labor Statistics.

[15] For more information on the returns to sub-baccalaureate education, see: (1) "The Economic Benefits of Sub-Baccalaureate Education: Results from National Studies," by W. Norton Grubb, in *CCRC Brief* (Community College Research Center, Teachers College, Columbia University), June 1999. (2) "Help Wanted...Credentials Required: Community Colleges in the Knowledge Economy," by Anthony P. Carnevale and Donna M. Desrochers, Educational Testing Service, 2001. (3) "CTE Contributions to Learning and Earning," by Michael E. Wonacott, *In Brief*, no. 11, National Dissemination Center for Career and Technical Education, 2001.

More information on lessons learned and examples of community college-CBO partnerships can be found in the following documents:

- *CAREER ADVANCEMENT FOR LOW-INCOME WORKERS THROUGH COMMUNITY COLLEGE AND COMMUNITY-BASED ORGANIZATION PARTNERSHIPS*
  KnowledgeWorks Foundation (2002, 19 pages).
  http://www.kwfdn.org/Resources/publications.html

- *CREATING BENEFICIAL INSTITUTIONAL COLLABORATIONS*
  Elaine W. Kuo. Educational Resources Information Center (ERIC) (1999).
  http://www.gseis.ucla.edu/ERIC/digests/dig9902.htm

- *THE BEST OF BOTH: COMMUNITY COLLEGES & COMMUNITY-BASED ORGANIZATIONS PARTNER TO BETTER SERVE LOW-INCOME WORKERS AND EMPLOYERS*
  Brandon Roberts. Public/Private Ventures (2002, 48 pages).
  http://www.ppv.org/ppv/publications/
  publications_description.asp?search_id=6&publication_id=88

- *BUILDING A CAREER PATHWAYS SYSTEM: PROMISING PRACTICES IN COMMUNITY COLLEGE-CENTERED WORKFORCE DEVELOPMENT*
  Workforce Strategy Center (August 2002).
  http://www.workforcestrategy.org/6_1.html

Engaging Employers as Partners and Co-investors

The most effective workforce development CBOs in the new labor market will adopt a "dual customer" approach, in which they simultaneously serve workers and employers. Within this approach, there are varying degrees of serving the employer customer.

At the least intensive level, organizations will know and understand the high-growth industries in the area that present realistic prospects of good jobs for their clients, the education and skill needs of employers in these industries, and how to provide job seekers and workers either directly or through access

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Characteristics of CBO-Employer Partnerships

Our prior research has indicated that employers represent a key stakeholder group and that partnerships with employers are an essential element of effective workforce development programs. To better meet the needs of their employer partners, many CBOs across the country are developing expertise in the "demand-side" of the labor market. These CBOs are developing detailed knowledge of industry career ladders and developing the necessary training and career supports to enable their clients to climb these ladders. The characteristics of the programs created through these partnerships are that they:

- Serve "dual customers," meaning the individual and the firm.
- Benefit from tight labor markets.
- Implement training as "demand-driven" (i.e., driven by employers).
- Provide critical services and career supports.
- Leverage private funding both from industry and foundations.

to focused education pathways. Researching high-growth industries involves using labor market information available for the region.

Understanding the education and skill needs of employers and working with them to upgrade the skills of their job applicants and workers involves three stages identified by the Washington, DC-based Workforce Strategies Initiative (WSI): choosing employer partners, structuring relationships with employers, and providing services that are valued by businesses. WSI conducted interviews with ten mature sectoral programs[16] and an employer representative from each in late 2003. These interviews resulted in three sets of key lessons learned, as outlined below.

- **Choosing an employer partner:**
  - Match their needs with your strengths.
  - Seek an employer with a vision.
  - Identify champions.
  - Appraise the organizational structure.
  - Look for employment practices that match your goals.
  - Select companies with competitive advantages.
  - Consider the appropriate number of employer partners.
  - Find an employer who will dedicate resources.

- **Structuring the relationship to create shared ownership:**
  - Institutionalize the partnership.
  - Engage employers in program design and development.
  - Create dynamic feedback loops.
  - Involve trainees and workers in program management.
  - Involve employer in staff selection.
  - Embed program staff within employer.

- **What employers want:**
  - To be heard and understood.
  - Expertise.
  - Flexibility and responsiveness.
  - Streamlined fundraising and grant management.
  - Demonstrated business benefits.
  - Recognition and celebration of accomplishments.

> ☞ *BEST PRACTICE HIGHLIGHT*
>
> Partnerships with employers, industry associations, and other providers are key to both [these programs]. These partnerships ensure that there will be jobs or career opportunities at the end of the training cycle.
>
> *--from the AACA case study in this chapter>>*

These are only the highlights of this research, and the reader should see the entire report for more information and examples from specific organizations.[17]

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[16] Sectoral employment development programs target a particular industry in order to place disadvantaged people in high quality jobs.

[17] "Building Effective Employer Relations," by Workforce Strategies Initiative, in *Update*, issue 1, May 2004, The Aspen Institute (http://www.aspenwsi.org/publications.asp?cid=5).

At the most intensive level, organizations become workforce intermediaries, in which they "bring together employers and workers, private and public funding streams, community colleges and training groups, unions and social service agencies to help businesses stay competitive and productive, and to help workers develop pathways to good careers."[18] Becoming a workforce intermediary is a tall order and may not be achievable by many CBOs. However, some CBOs are of the appropriate size and scope to accomplish this. For these organizations, the seminal publication in this area is: *Workforce Intermediaries for the Twenty-first Century*, edited by Robert P. Giloth, published in association with The American Assembly, Columbia University by Temple University Press: Philadelphia, 2004.

A Selection of Relevant Case Studies

In the research for this project, we asked organizations to describe innovative work or collaborations with partners in their local or regional workforce development systems. The case studies below capture these innovations and identify promising or best practices.

ACTION FOR BOSTON COMMUNITY DEVELOPMENT (ABCD)
and
THE FINANCIAL SERVICES ACADEMY (FSA)
of
THE NEW ENGLAND COLLEGE OF FINANCE (NECF)
Boston, MA

Mark Isenburg, Vice President of Workforce Development and Technology Services, ABCD
Linda Fera, Director of Operations, FSA
Richard Elliot, Vice President, NECF

Overview

In 1999, the Financial Services Academy was launched with 9 corporate members and 7 community partners, including four community-based organizations. The case study below describes the model through the entry-point of ABCD, a Community Action Agency with 15 locations throughout Boston.

Background

Action for Boston Community Development: ABCD[19] was incorporated in 1962 with an initial grant of $2 million from the Ford Foundation and several other funding sources. In 1964, this organization was designated Boston's official antipoverty agency. With a current staff of 800 and an annual budget of approximately $95 million, ABCD now serves over 100,000 low-income individuals and families each year through a decentralized neighborhood-based structure. ABCD continues to fulfill its original mission of promoting self-help for low-income

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[18] Press release from Temple University Press, "New 'partnerships' link low-income workers to good jobs, help prevent labor shortages," publication date: December 31, 2003.
[19] www.bostonabcd.org

people and neighborhoods; it offers multiple services and programs, from education and job training to housing and fuel assistance to child care and elder programs.

ABCD has been involved in education and workforce training for decades. Its current workforce programs include LearningWorks and Skills Training Programs. LearningWorks is ABCD's workforce development center in downtown Boston. This resource center operates programs that prepare welfare recipients for work through job-readiness training, adult education, job placement services, child care and transportation assistance, pre-placement support, and case management services up to 12 months after job placement.

ABCD's Skills Training Programs provide low-income Boston-area residents with skills training and job placement services. In addition, ABCD operates one of Boston's One-Stop Career Centers legislated under the federal Workforce Investment Act and was the founder (and now a key partner) of the Urban College of Boston.

Partnership with the Financial Services Academy and New England College of Finance: A casual lunch conversation in 1998 between Mark Isenberg of ABCD and Bob Regan, President of the New England College of Finance (NECF) gave rise to the Financial Services Academy. Over lunch Regan communicated a key, ongoing challenge facing the financial services industry. Typically, financial service institutions hired college graduates for entry-level positions to ensure qualified employees. However, these overqualified hires quickly lost interest in the position and often quit soon after they were hired. The result was an unacceptably high turnover rate and thousands of wasted dollars on hiring, orientation, and training for these positions. By one estimate, turnover costs were as high as $43,000 per person.[20] An additional challenge was the high premium paid to temporary help agencies to fill these high-turnover, entry-level positions. Isenberg indicated that some sort of direct referral process with an organization that could deliver qualified candidates would reduce these costs.

In its effort to move low-income individuals toward economic independence, ABCD was continually looking for industries in which to place its trainees. Because of the financial service industry's pattern of hiring college graduates, however, ABCD has not placed many trainees in financial services. It quickly became clear to ABCD and NECF that the potential for partnership was great.

Over lunch, ABCD and NECF created the Financial Services Academy concept: train low-income individuals for entry-level positions in the financial services industry. The CBOs would screen and refer recruits and provide the necessary support services to ensure individuals completed training. The financial institutions would devise the curriculum and fund the training. New England College of Finance would house and operate the training and be a source of continued education and training for the workers after they were placed into jobs.

ABCD and NECF introduced the idea to George Russell, Executive Vice President and Director of Community Affairs at State Street Bank and Board Chairman of the Urban League of Eastern Massachusetts. Marsh Carter, president of State Street Bank and a well-respected and influential leader in the industry, embraced the idea and championed it at a breakfast meeting he called for other industry partners. Salient arguments for piloting the FSA approach included

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[20] Goodspeed, Linda. "Ninety-year-old finance college gets newer every day." 2001. *Boston Business Journal.* Vol. 21, No. 1. February 9-15.

the fact that some ABCD clients were already working in many of financial institutions and had a proven track record for retention (about 75%); the FSA training would help to meet the industry's Community Reinvestment Act requirements; and that financial services institutions could have a greater social impact. State Street Bank Foundation provided the seed money to test the idea. After the first year, each of the Founding Members agreed to pledge appropriate annual financial contributions to sustain the program.

The Financial Services Academy Model: The FSA was officially launched in January 1999. Its mission is threefold: 1) to provide a steady stream of qualified candidates for entry-level positions in the financial services industry; 2) to provide career opportunities for diverse populations; 3) to encourage long-term career growth through ongoing education and academic credentialing. Now entering its fifth year of operation, the FSA has graduated nearly 400 students with a financial services credential recognized by the industry partners. Despite a difficult financial services market in the past few years, the FSA has placed over 80% of its graduates in the industry. Academy graduates have a high retention rate, continually exceeding industry averages with 90% still employed in the industry. The vast majority of Academy graduates are ethnic minorities or recent immigrants and 75% identify English as their second language. Since the FSA began, ABCD has referred 200 individuals to the training.

The Financial Services Academy is an operating division within New England College of Finance. Boston-based NECF educates and trains financial service employees through degree and career development programs. The college has approximately 550 instructors, mostly drawn from industry. At any given time, there are approximately 7,500 students enrolled in NECF courses.[21]

FSA is governed by a Board of Overseers, which reports to NECF's Board of Trustees.[22] These high-powered members of the Boston financial community provide financial support to the FSA and the NECF annually. They also contribute intellectual capital through the creation of the curriculum and commit time to monthly board meetings. In order to get these industry competitors to cooperate on the development and implementation of the FSA, a key 'rule' was established early by the President of State Street Bank: all participating companies were to 'leave their guns at the door.'

A wide variety of community-based partners and organizations complete the FSA Partnership. Founding Community Partners include: ABCD, Boston Private Industry Council, Boston Workforce Development Coalition, Morgan Memorial Goodwill Industries, Inc. STRIVE Inc., the Greater Boston Financial Services Professional/BUBF, and Urban League of Massachusetts. These partners attend board meetings and regularly screen and refer clients to the FSA. In addition, a wide range of contributing CBOs routinely screen and refer clients to the FSA. [23]

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[21] Most students are sponsored entirely by their companies. The majority of classes are offered at night in classrooms located at member companies.

[22] Members represented on the Board of Overseers include: Boston Financial Data Services, Federal Home Loan Bank of Boston, FleetBoston Financial, Investors Bank and Trust Company, J.P. Morgan investor Services Co., Sovereign Bank, State Street Corporation, and Dedham Institution for Savings.

[23] Contributing CBOs include: Hyde Park High School (Academy of Finance); International Institute of Boston; Jewish Family Services; Jewish vocational Services; LARE Training Center; Notre Dame Education Center; Oficina Hispana; Veteran Technical Training Institute (VetTech).

The FSA Training Program

The core program of the FSA is an intensive three-week training program designed to replicate the financial services work environment. Classes run from 9 to 5, Monday through Friday, and consist of multiple types of teaching and learning methods. The three key areas of concentration include: 1) Understanding the Financial Services Industry; 2) Working in the Financial Services Industry - Workplace Protocol and Culture; and 3) Quality Customer Service. Participants are assessed throughout the training through role-plays, essays, and practical application of content knowledge.

Training activities include classroom learning, group exercises, role playing, field trips and tours of Founding Member companies, presentations by company representatives on working in the industry, homework assignments, and a final group research project. The FSA and CBO staff provide as needed support services throughout the training. At the end of the program, graduates receive a credential[24], are provided with information on how to access continued education at the New England College of finance, and receive assistance with job placement through job fairs and FSA connections with recruiters.

The FSA has one fulltime Director of Operations, two part-time assistants, and two adjunct instructors that are shared with the NECF. Depending on demand by industry partners, it will run two to seven 3-week sessions every year, with 11 to 29 students in each session. Once FSA graduates are placed in jobs in the industry, they have the opportunity to continue their education through the NECF.

Success Factors: The FSA provides a strong model of a CBO-industry partnership. Key to its success is the fact that it meets the needs of each participating stakeholder. Through the FSA, low-income individuals gain access to training and jobs that hold great potential for career advancement and long-term self-sufficiency. For CBOs, the FSA provides an opportunity to fulfill their mission and to develop close connections to employers and a deeper understanding of the labor market. For industry, the FSA provides a pipeline of qualified (but not over-qualified) entry-level employees. The program helps industry partners reduce their recruiting costs as well as their turnover rates. Importantly, the FSA represents a real business investment for industry partners. While industry partners value the opportunity to 'give back' to the community, their primary interest in the FSA is strategic, not philanthropic.

Another critical factor to the success of the FSA was the early development of an industry "champion" to promote and support it. Without the driving force of Marsh Carter at State Street Bank, it is unlikely that the FSA would exist today. One manifestation of the appreciation for this champion is the "Marsh Carter Award," given annually to outstanding FSA graduates. Similarly, the consistent support and superb leadership of Bob Regan, the President of the NECF and someone trusted by the industry partners, was key.

Leadership at the top of the industry is important, but just as important is the leadership on the ground. Without the operational savvy and dedication to quality of Linda Fera, the Director of Operations, this program would not be a success. "This program requires all levels of

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[24] Only the industry partners in the FSA recognize this credential.

leadership from the Board to the classroom...and Linda is key," according to Richard Elliot, Vice President of the New England College of Finance.

Replication of the FSA: FSA's initial success has led NECF to replicate the model with other industry partners. In 2001, NECF expanded the FSA model to the North Shore of Massachusetts in a partnership with the North Shore Banking Collaborative.[25] Banks in the Collaborative paid an initial $10,000 to the New England College of Finance to tailor the job training program to meet the needs of the partnership. The Collaborative splits the $22,500 cost of the training program with the Southern Essex Workforce Investment Board. The two Career Centers in the North Shore area provide basic skills training and screening for candidates of the training.

In 2002, the FSA expanded the program internationally to Ireland. In partnership with the Belfast Unemployed Resource Center (BURC) and the Docklands Development Authority (DDA), the FSA was one component in a four-month training and internship program for 14 trainees at local financial services companies. The New England College of Finance plans to continue this partnership and develop others globally.

Challenges to Replication: Community-based organizations participating in the FSA are interested in replicating the model to other industries. While the FSA has been a great success, it can't accommodate the number of low-income people CBOs seek to place in training and jobs. Nor can it accommodate the varied professional interests of CBO clientele. From ABCD's perspective the main challenge to replicating the model is lack of public funding. The FSA is exceptional in that industry partners pay for all of the training. It is unclear whether other industries (e.g. food and hospitality) would be willing to commit comparable resources to a training program. Without more flexible public dollars for training, CBOs like ABCD are limited in their ability to replicate the FSA model.

ASIAN AMERICAN CIVIC ASSOCIATION (AACA)
200 Tremont Street
Boston, MA (http://www.aaca-boston.org)
Chau Ming Lee, Executive Director[26]

Background

The Asian American Civic Association, formerly known as the Chinese American Civic Association, has been active in Boston's Asian community over 35 years. The past three decades have seen vast growth in the Asian community and AACA has also grown in order to meet the community's changing needs.

AACA was born in 1967 as an organization to meet the social and cultural needs of first and second generation Chinese Americans. In the early 1970s, it became the major social planning and cultural advocacy agency in Chinatown, out of which evolved the South Cove Community Health Center and the Chinese Golden Age Center, as well as AACA's present existing programs.

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[25] The Collaborative includes Beverly National Bank, Danvers Savings Bank, Eastern Bank, Heritage Bank in Salem, Ipswich Bank, North Shore Bank, and Salem Five Cents Savings Bank.
[26] This edited profile is reprinted with permission from a Commonwealth Corporation-Center for Law and Social Policy report (forthcoming) on innovative practices in serving immigrants and refugees.

In 1979, AACA increased its commitment to include refugees from Laos, Cambodia and Vietnam. In 1982, the agency expanded to include prevocational skills training for immigrants and refugees. In 1984, AACA also expanded its services to include vocational training. In 1988, the agency inaugurated workplace education programs for newcomers in the workforce. In 1991, an External Diploma Program was offered as alternative remedial high school education.

The primary mission of the Asian American Civic Association is to provide limited-English speaking and economically-disadvantaged Asian adults and youth with programs and services to develop the survival, literacy and employment skills needed to gain durable economic independence. Providing the right tools to these linguistic minorities will strengthen their ability to undertake their responsibilities in the larger community. This will in turn enable them to realize their potentials as contributing family members, productive workers and participating citizens.

Program/organization overview

To accomplish its mission, AACA operates three components:

- EDUCATION CENTER, which provides English as a Second Language (ESL) instruction, as well as prevocational, vocation and supplemental skills training.

- MULTI-SERVICE CENTER, which provides a wide range of human services, including immigration counseling, housing assistance, and job counseling.

- SAMPAN NEWSPAPER, which provides education and information to the Asian community in Greater Boston. (Not covered in this case study.)

AACA's programs serve individuals with multiple barriers including language, skill, employment, and cultural barriers.

Education Center programs

The purpose and target populations of the Education Center programs are as follows:

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1. **Survival Skills ESL**

   ADULT ESL PROGRAM provides basic survival skills and elementary ESL to immigrants who want to upgrade their employment situation through additional command of the English language. 5 Levels from literacy to Level 4 and each level of the program is 12 weeks long, October - December, January - March, April - June and July - September.

   OCCUPATION-SPECIFIC ESL PROGRAM, funded by the City of Boston, it is a program for employment and it provides instruction in ESL and basic computer skills to those who are either Boston residents, or who have been laid off by Boston employers recently. The objective of the program is to provide ESL and skills training for job-readiness. Applicants should be ready and willing to work full time. Job placement counseling will be provided upon the completion of the program.

   THE ASIAN FAMILY LITERACY PROJECT helps Asian immigrant parents gain English language proficiency and cultural knowledge, be involved with their children's education,

and attain economic self-sufficiency. The 16-week-long cycle consists of English classes, monthly community workshops, family literacy sessions, and field trips. Through the participation of all the program activities, students are not only able to acquire survival English skills, but also to become more effective parents and community members.

2. **Vocational Training and Academic Preparation**

ADULT BASIC EDUCATION PROGRAM is an intermediate-level English program to help students get ready for community college, job training programs, alternative high school diploma programs, or employment. The ABE Program has 4 levels and focuses on the reading, writing, listening, speaking, study skills and basic computer skills necessary for success in higher education or in American jobs. The program also includes short-term and long-term goal planning. Each level of the program is 15 weeks long, January - April, May - August, and September - December.

HOSPITALITY SKILLS TRAINING PROGRAM provides instruction in customer services, communicative English, analytical skills, and problem solving skills. Job shadowing and internship in hotels are also provided. The job placement component will assist program participants in job search and placement at the completion of the training.

OFFICE SKILLS TRAINING PROGRAM provides instruction in business English language, typing, use of computer, accounting, general office skills, word processing, and data entry. It also provides training on job search and job retention skills. The counseling component assists program participants in job placement at the completion of training.

EVENING BUSINESS TRAINING PROGRAM provides instruction in accounting, word processing, data entry, and business English. Job placement assistance will also be provided to participants at the completion of this 15 weeks program.

3. **Worksite Programs**

WORKPLACE ESL PROJECTS provide tailor-made ESL training to workers of a specific worksite. The objective is to enable workers to improve productivity and quality of work, skills, critical thinking, analytical skills, and problem solving skills. The project is conducted at the Radisson Hotel, the Wyndham Hotel, and the Micro System.

PREPARATION FOR CONSTRUCTION PROGRAM provides specialized construction ESL, mathematics, resume writing, interviewing skills and construction techniques to students who want a career in construction.

4. **Supplemental Programs**

RESTAURANT HEALTH AND SAFETY PROGRAM aims to upgrade management and worker knowledge of foodservice sanitation and related health and safety issues. Graduates will receive a certificate from the National Restaurant Association upon passing a standardized test.

CITIZENSHIP PREPARATION CLASS provides basic instruction in American history and government. The purpose is to prepare immigrants for their naturalization examination conducted by the Immigration and Naturalization Service. Counseling and other supportive services in reference to immigration issues are also provided.

Multi-Service Center programs

The objective of AACA's Chinatown Multi-Service Center is to assist Asian newcomers to achieve social self-sufficiency through a wide range of social services. These services include:

IMMIGRATION COUNSELING.   Recognized as a voluntary agency by the U.S. Immigration and Naturalization Service, the program provides counseling in the areas of initial entry into the U.S., change of status from immigrant or refugee to permanent resident and the application procedure for citizenship. The program also assists clients in petitioning to bring immediate family members - spouses, children, parents and siblings - into the United States.

HOUSING COUNSELING.   The bilingual housing counselor helps clients to find suitable housing - often low income, elderly or government subsidized. The counselor also assists clients in matters of housing code enforcement, tenant-landlord relationships, home-buying and homeownership issues, and rehabilitation assistance.

JOB COUNSELING AND PLACEMENT.   A bilingual job developer and a job counselor provide assistance in employment counseling, job development and job placement. The counselor also oversees the Chinatown Summer Youth Jobs Program.

COLLEGE ACCESS.   The counselor specializes in assisting foreign-born prospective college students in application processing, financial aid and career counseling. This service offers immigrants a chance to pursue a college education, particularly those adults who have earned credits in other countries but must negotiate the transfer of those credits with their new schools. This service is provided in collaboration with the Higher Education Information Center. AACA has assisted several of its clients in obtaining scholarships from the Boston Adult Literacy Fund.

FAMILY AND INDIVIDUAL COUNSELING.   The counselor provides assistance to individuals and families struggling to overcome problems related to social and emotional adjustment in a new country. The counselor also conducts public seminars on survival skills and the American world of work.

SOCIAL SECURITY ASSISTANCE.   This service is carried out through a claims representative provided by the U.S. Social Security Administration. The representative assists community members with retirement, disability and supplemental security income claims.

FUEL ASSISTANCE.   This service links clients with ABCD programs for fuel assistance and home energy projects.

TRANSLATION AND INTERPRETATION.   These services are provided to individual clients, as well as to outside organizations which contact the Multi-Service Center to translate information into Chinese, Vietnamese and Cambodian.

INFORMATION AND REFERRAL are provided in cases which require services not offered at the Multi-Service Center. Referrals are made to a wide network of community and government agencies as necessary.

TAX PREPARATION ASSISTANCE.   Every tax season from January to April, A.A.C.A. helps speakers of foreign languages to prepare and file their federal and state income tax returns.

JOB FAIRS AND AD HOC EMPLOYMENT CENTERS. AACA in conjunction with area employers organizes job fairs and ad hoc employment centers to help employers find workers. A recent example was a collaboration with the Doubletree Hotel to recruit workers from the Chinatown community for the newly constructed Doubletree Hotel at the former Don Bosco High School site. More than 700 job seekers participated in the job fair. As a result of the success, there were subsequent requests from other hotels, such as Marriott Hotel and the Ritz Carlton Hotel, and other businesses, such as the Loews Cinema, the Central Parking, and the Sport Club of the Millennium project, to conduct similar job fairs for their workforce recruitment.

New initiatives

AACA has recently launched two new initiatives: the Biotech and Healthcare Industries for Immigrants and Minorities initiative and the Automotive Industry Training Program.

Main components and structure of these programs:

Biotech and Healthcare Industries for Immigrants and Minorities: AACA developed a Basic Skills Course to prepare students for careers or higher-level training in biotechnology and healthcare. The 14-week course is funded by the Massachusetts Biotechnology Council and Social Venture Partners as part of a statewide BEST (Building Essential Skills Through Training) initiative. The collaboration also involves Jewish Vocational Services, Urban League of Eastern Massachusetts, La Alianza Hispana, and the Vietnamese American Civic Association. Course curriculum includes reading, math, resume development, interviewing skills, team building, computer skills, and understanding different cultural groups. To be eligible for the course, students must have a steady work history, plus the intent and ability to enter the biotech or healthcare field as a *career*, not as a short-term job.

Automotive Industry Training Program: AACA convened over 20 company and industry association representatives, training providers, and community-based organizations to design an Automotive Repair Training Program. The program obtained funding for a planning grant from the Boston Workforce Development Initiative, a multi-foundation initiative spearheaded by the Boston Foundation. Still in the planning phase, the program actively involves members of the automotive industry as partners and as providers of input for curriculum design and certification. The program is the only one of its kind to target Boston-area immigrants and minorities, to train them for careers in the automotive-repair field. Lead members of this AACA-led partnership include the Massachusetts State Automobile Dealers Association, Westminster Dodge and Sullivan Tire, La Alianza Hispana, and Urban League of Eastern Massachusetts.

Partnerships with employers, industry associations, and other providers are key to both the Biotech and Healthcare Industries for Immigrants and Minorities initiative and the Automotive Industry Training Program. These partnerships ensure that there will be jobs or career opportunities for AACA's clients at the end of the training cycle.

The general goals/outcomes for this program are to create a career pathway that will lead to economic self-sufficiency. Specific career and job options are being identified along with training requirements and desired wages and benefits. AACA is revising its MIS system to be able to capture these longer-term outcomes. Program funding for these two promising initiatives is mostly private from private foundations.

These two new initiatives speak directly to the need of employers to fill jobs and to the need of AACA clients to find jobs that pay family-sustaining wages. The development of broad-based partnerships with industry and other providers along with the availability of multiple education and wrap-around support services appear to position these programs for success.

Best Practices Vignettes

Adirondack Community Action Programs, Inc.
Elizabethtown, NY
Margorie Garcia, Development Coordinator

The Adirondack Community Action Programs, Inc. is a vital component of the workforce development system in Elizabethtown, NY. This CAA is the operator of the One-Stop Career Center, which is housed in their agency. They receive WIA Title I funds through the WIB system to operate the One-Stop Career Center. Relationships and partnerships with organizations such as the Department of Social Services, NYS Department of Labor, Champlain Educational Services, North County Community College, Clinton Community College and Vocational and Educational Services for Individuals with Disabilities allow the CAA to provide comprehensive, effective direct referrals and relatively immediate services. Adirondack Community Action Programs, Inc.'s philosophy is "that comprehensive planning and service management in a seamless one-stop environment have allowed us to more effectively manage our internal and external resources while providing a high level of services."

Schuylkill Community Action
Pottsville, PA
Jennifer Slifka, Director of Client Services

Schuylkill Community Action's (SCA) Supported Work Program is located at the One-Stop Career Center. SCA is a managing partner of the Career Center, which is operated by the local WIB organization. This partnership has proven beneficial for Supported Work clients as well as staff. By being located at the Career Center, staff of SCA are able to learn about and better participate in a business-driven environment, while advocating for clients of SCA. The relationship between the SCA and the WIB was traditionally one of rivalry; however, since the SCA has done an excellent job with the Supported Work Program, SCA is viewed as vital to the workforce development network in the Pottsville, PA area.

Tacoma Community House
Tacoma, WA
Deborah Reck, Education Director

Tacoma Community House (TCH) is a private, nonprofit organization that is closely connected with the WIB and workforce development system in their region. The Executive Director of TCH is a member of the Executive Committee of the WIB. TCH is an affiliate of the One-Stop Career Centers and provides "core" services.   TCH's expertise is in training for English for Speakers of Other Languages (ESOL) and they receive WIA Title I funding from the WIB for youth programs

and to help limited-English speakers get jobs. Relationship building with the WIB took time. TCH's outcome-driven programs were appealing to and aligned with the WIB and its goals. TCH's philosophy is to let those do what they do best, and TCH does ESOL and refugee services best.

Women at Work
Pasadena, CA
Bety Ann Jansson, Executive Director

Women at Work has little or no relationship with the local WIA or WIB network. Between 85 and 90 percent of their funding is from private sources such as fund raising events, foundations and civic organizations. The major network in which Women at Work is associated is the Wider Opportunities for Women's (WOW) national association. The primary goal of Women at Work is to help women in the Pasadena, CA area to get *good* jobs. The organization is an affiliate of the One-Stop Career Centers, but its engagement with them is minimal. It is not represented on the WIB Board, but receives assistance from the WIB with private sector employer information and contacts. Women at Work aspires to achieving the goals of the Self-Sufficiency Standard developed by WOW for the 3,000-4,000 women who utilize their services annually.

Community Teamwork, Inc. – Lowell Small Business Assistance Center
Lowell, MA
Russell Smith, Executive Director

The Lowell Small Business Assistance Center (SBAC) has conducted an informal assessment of the workforce development system in the region, which was based on the Executive Director's direct involvement as a member of the Workforce Investment Board. The SBAC is funded by a partnership between Community Teamwork, Inc. (CTI – the CAA agency in Lowell), Middlesex Community College, and the City of Lowell. The Executive Director works closely with these partners and the WIB. These relationships have helped SBAC to scope out its role of assisting individuals and families in making their own jobs by creating businesses. The WIBs provide employer contacts and services to assist customers to enhance their skills through the Career Center. Career Centers refer clients to the SBAC who don't "fit" into traditional training and workforce development programs and who are interested in entrepreneurial ventures. The SBAC evaluates their success in a variety of ways. One key measure is the number of businesses created.

Operating a Workforce Development Program

━━━ *Key guidance in this section:*

☑ How to address programmatic considerations.
☑ Assessment of an appropriate support services mix.
☑ Promising and effective practices.
☑ Tools and models.

Deciding Which Services to Provide

Providing deep and wide education, training, employment and support services along the self-sufficiency continuum requires both an ambitious mix of client services as well as multiple, strategic partnerships among non-profit, public and private organizations. Importantly, many Community Action Agencies (CAAs) and other community-based organizations (CBOs) now recognize that moving individuals toward economic self-sufficiency requires an increased focus on employer partnerships. Because employers are the actors that ultimately provide low-income individuals with opportunities for career and wage advancement, an increasing number of CBOs are forming or strengthening partnerships with employers in key industry sectors and helping create career paths that can lead low-income individuals toward family-sustaining employment.

The service mix and partnerships CBOs engage in appear to be shaped by several factors, including mission, organizational capacity, community resources for workforce development, and target population.

Our research has revealed various models of how organizations provide supports and services to clients along the self-sufficiency continuum. In one model, the CBO positions itself as a "coach" or "advisor" to clients as they plot their course toward economic independence. In this model, the CBO "checks-in" with the client on a regular basis, connects the client to other agencies and resources when necessary, and provides rewards of encouragement at each step along the continuum. In another model, the CBO forms partnerships with other organizations that operate at higher stages of the self-sufficiency continuum effectively "passing off" the participant, much as an elementary school passes up a student to middle school. In a third model, the CBO positions itself as an explicit "point of contact" for the individual and family providing comprehensive support at each step along the

continuum. (For more on the self-sufficiency continuum, see the section of this chapter on Wrap-Around Support Services.)

The service mix and partnerships CBOs engage in appear to be shaped by several factors, including mission, organizational capacity, community resources for workforce development, and target population.

- *Mission.* CBOs share a common mission to reduce or eliminate the causes and consequences of poverty in their communities. How they achieve this mission varies considerably, however. Typically, CBOs address a particular issue such as housing or employment. In addition, many organizations focus on a particular target population such as immigrants, refugees, or welfare-to-work clients. As such, each CBO's primary service delivery revolves around its particular mission.

- *Organizational Capacity.* Some CBOs have hundreds of staff and multi-million dollar budgets. These large-scale organizations typically offer multiple services in-house, including assistance with housing, fuel programs, child care (some house their own Head Start centers), transportation, basic education, English training, hard and soft skills employment training, job placement, and career advancement. In contrast, many CBOs are quite small and specialized with just 1 or 2 staff and restricted budgets. In these cases, the CBO may act as a "broker," helping clients identify appropriate community resources that meet their needs and/or helping clients address a specific problem, such as housing.

- *Community Resources for Workforce Development.* Community resources for workforce development vary considerably, thereby shaping CBO service delivery mix in important ways. In some communities, the One-Stop Career Center may offer case management-type services for clients and will contract with CBOs for specific education, training, and support services. In other communities, the One-Stop Career Center may specialize in brokering services for clients by connecting them to large-scale CBOs offering a wide range of services. Finally, in many communities, the location of the One-Stop Career Center may not be convenient to offer services to clients, placing more responsibility on smaller, local CBOs to provide almost all workforce development and support services.

> **☞ BEST PRACTICE HIGHLIGHT**
>
> CAMBA is now one of Brooklyn's largest CBOs, and it has recently restructured to integrate all its programs under the umbrella of workforce development.... Wrap-around services are managed through referrals to other city and state agencies.
>
> *--from the CAMBA case study in this chapter>>*

- *Target Population.* Community demographics also determine the specific service mix organizations provide. Some CBOs target their services toward specific populations such as members of a particular minority group, individuals with criminal records, or individuals transitioning from welfare to work. A few of the CBOs interviewed provide supportive services for refugees and recent immigrants. In addition to

traditional services and supports, these CBOs may provide counseling and support to torture victims as well as assistance with U.S. citizenship.

The following table provides some perspective on the service mix for CBOs by presenting the frequency with which respondents to a survey conducted in conjunction with development of this guide identified their range of programs. (For more on this survey, see the discussion in Chapter 1 on Findings for Survey Conducted for This Guide. Other findings are discussed later in this chapter.)

Table 1. A Sampling of CBO Service Areas

Support Services Most Frequently Identified in CBO Survey	CBOs in Survey Group Providing the Service (%)
Intake and referral	100
Case management/counseling	93
Job readiness	93
Client assessment	89
Job placement	89
College connection	86
Job referrals	82
Career counseling	75
Skill training	75
Job retention services	71
Adult basic education and pre-GED	68
Skill-upgrade training	68
Reconnection post-job placement	57
GED/alternative diploma	54
Job shadowing	54
English for speakers of other languages (ESOL)	46
Other Support Services Identified in CBO Survey	
Paid work experience and subsidized work	NA
Language bank	NA
Training for other CBOs in volunteer services	NA
Family literacy	NA
Micro-enterprise development, one-on-one counseling, and technical assistance for small business development	NA
Financial literacy	NA
High school career conferences	NA

NA = not available.

Participant Recruitment, Assessment, and Case Management

Participant recruitment occurs through a variety of mechanisms, including referrals from other CBOs, public workforce development agencies, and other partners; word-of-mouth referrals through clients and from other programs within the organization; and public relations branding and marketing efforts. However, one thing is clear: Individual job seekers and workers must come with a funding source, from a public entity (e.g., a training voucher), from their employer (e.g., customized employer training), or from their own wallets. Although there are still a few public funding sources that contract for groups of individuals to be served, the general movement in the system is toward individual choice, which translates into individual funding.

Assessment should be standardized, comprehensive, include client assets as well as barriers, and involve the client in their own assessment of where they are. An excellent resource for this type of assessment is the Scales and Ladders initiative. As noted in Chapter 1, in 2000 and 2001, eleven CAAs in Massachusetts piloted *the Massachusetts Self-Sufficiency Scales and Ladders Assessment Matrix* with support from the Massachusetts Department of Housing and Community Development (DHCD). This tool—which satisfies the Results-Oriented Management and Accountability (ROMA) requirements related to federal Community Services Block Grant funding—can be found at http://www.roma1.org/files/rtr/MA_Scale.doc. A version of the tool also is included in the Tools and Resources section of this chapter. Other ROMA tools and resources can be found at http://www.roma1.org/room4a.asp and at http://www.masscap.org/roma.html.

To assess basic and English language skills, CAAs can visit the web site of the Massachusetts Department of Education (Adult and Community Learning Services) to find the Commonwealth's assessment policy and recommended tests and other assessments appropriate for the assessment of literacy and English language skills at http://www.doe.mass.edu/acls/pawg/. In addition, CBOs are encouraged to review the Department's *Countable Outcomes Policy* at: http://www.doe.mass.edu/acls/pawg/co_manual.html?section=narrative. These Massachusetts resources may be equally useful for CBOs operating programs in other parts of the country.

Case management should be "client-centered" and respect the client as a person, not merely a case. Also, it should include facilitating a client's ability to problem-solve and be as long-term as possible or necessary, ideally two years or more (including well after job placement). Useful models for case management include mentoring and alumni services.

> ☞ **BEST PRACTICE HIGHLIGHT**
>
> This program does not provide traditional case management or direct support services. Instead of "managing" a case, Training, Inc. staff work with trainees in a "problem solving process" to help them figure out how to solve their own support service needs. Each trainee has a "supervisor" who serves as the initial contact person for problem solving.
>
> *--from the Training, Inc. case study in this chapter>>*

Job Placement, Retention, and Advancement

Although there is little "hard" evidence on what works and what doesn't for improving job placement, retention, and advancement of low-wage workers, studies have revealed numerous lessons learned from programs. Two very good articles in the book *Low-Wage Workers in the New Economy*, published by The Urban Institute Press in 2001, highlight lessons learned from a review of research and program evaluations.[27] For simplicity, we have combined the lessons learned into a master list. For readers' reference, most of the placement and retention lessons are derived from: "Staying On, Moving Up: Strategies to Help Entry-Level Workers Retain Employment and Advance in Their Jobs," by Anu Rangarajan. Most of the lessons learned on advancement are derived from: "Promoting Access to Better Jobs: Lessons for Job Advancement from Welfare Reform," by Julie Strawn and Karin Martinson.

An organization should have clear criteria for what constitutes a "good job," such as placement in a high-demand occupation, certain wages, benefits, and access to education and training opportunities.

Both authors make note of two important overarching themes. *First*, job placement, retention, and advancement are not separate and sequential activities and should not be treated as such. Retention and advancement strategies must be considered and woven into placement activities.

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[27] *Low-Wage Workers in the New Economy*, edited by Richard Kazis and Marc S. Miller, published by the Urban Institute Press: Washington, DC. 2001.

Also, initial job placement often directly affects retention and advancement. Job seekers placed in good jobs with career prospects are likely to retain employment and advance.

Second, strategies for placement, retention, and advancement are new and have not been tested for effectiveness. A key consideration, however, is that an organization should have clear criteria for what constitutes a "good job," such as placement in a high-demand occupation, certain wages, benefits, and access to education and training opportunities.

The following framework is based on the sources noted above and on reviews of lessons learned in various studies on these strategies, as well as anecdotal information from practitioners. These are not proven "best" practices, only promising practices. Additionally, these strategies are informed by a specific lens: Helping welfare-to-work clients succeed in the workplace. Although this is a very narrow lens, similar strategies have been included in lessons learned for other CBO clients seeking employment.

> ☞ **BEST PRACTICE HIGHLIGHT**
>
> Prospective trainees complete an application, receive a tour and basic information on the program, engage in a one-on-one interview, and take a basic skills test.... Generally, trainees must have stable support service plans in place before they start training. However, Training, Inc. staff do provide some help with problem-solving any support challenges.
>
> *--from the Training, Inc. case study in this chapter>>*

- ▪ **Initial placement strategies:**
  - o Provide soft skills training and other basic technology-related training.
  - o Provide career placement assistance as part of job search programs.
  - o Provide basic skills and vocational training in rapidly growing occupations and areas of high demand.
  - o Try to place clients in jobs with decent wages and benefits, and where the employer is flexible regarding challenges the client may be facing.
  - o Try to place clients in jobs with employer-sponsored training and opportunities for advancement.

- ▪ **Retention strategies:**
  - o Increase the accessibility of support-service payments and services.
  - o Provide initial employment expenses for work-related payments, such as clothing and tools, and provide other one-time emergency payments.
  - o Include job retention in pre-placement workshops.
  - o Provide enhanced case management and counseling.
  - o Attempt group meetings with participants.
  - o Create opportunities for effective mentoring or job coaching.
  - o Make work more attractive by providing wage supplements or other subsidies so that low-income earners have more cash in hand.
  - o Consider using financial or non-financial incentives to affect behavior or short-term outcomes.
  - o Encourage employer involvement and try to tailor services and programs to meet employers' needs.
  - o Provide funding for Employment Assistance Programs.
  - o Ensure easy access to job search assistance and placement.

- **Advancement strategies:**
  - Connect people directly to better jobs by building a job advancement focus into pre-employment services.
  - Upgrade the skills of unemployed individuals in flexible and individualized training programs targeted specifically to local labor market needs.
  - Upgrade the skills of employed individuals by creating partnerships with employers for customized training; redesigning existing CBO education and training offerings to make them more accessible for workers; and providing financial support for low-income workers to upgrade skills on their own.
  - Consider sectoral strategies and job laddering.

As with other sections of this guide, this framework is just a taste of the valuable information on these lessons learned. Interested readers should review the articles in the book for more detailed information and examples from various programs.

Education and Training

In order to be most effective, education and training programs should be highly tailored to the learner, the level of education, and the industry. Given these three significant areas, it is not possible for this guide to provide in-depth technical assistance on all of them. In fact, several guides could be written on even one! Overall, the literature review conducted in conjunction with development of this guide revealed a "best practice" list of guidelines for education and training programs. Such programs should include the following:

- Be accessible to unemployed and employed people.

- Have connections to post-secondary education (partnerships, "bridge" courses, articulation agreements).

- Mimic the workplace and provide "practice" for soft job skills.

- Provide "contextualized" education, integrating primary materials from the industry into training (both for job training of unemployed individuals and customized job training for employer people).

- Employ appropriate adult learning methodologies.

- Include life/soft skills training (ideally incorporated into the "hard" skills training program structure and curricula).

> ☞ **BEST PRACTICE HIGHLIGHT**
>
> Our purpose is to create a level of economic self-sufficiency for mature female workers in the community who have experienced job displacement related to NAFTA.... The core knowledge for a particular career is taught in Spanish and the practical knowledge in English. The last step of the process is to help the participants obtain the "system level" knowledge needed to actually run a business.
>
> *--from the El Puente CDC. case study in this chapter>>*

- Focus on credentials.

- Focus on educational pathways/linking short- and long-term job training and post-secondary education.

- Be competency-based.

- Provide technology training.

- Allow open entry/open exit whenever possible and feasible.

- Use a modular delivery mode where possible and feasible.

For more specific guidance on promising practices for operating specific types of education and training programs, we strongly recommend that CBOs consult the web site for WorkforceUSA (http://www.workforceusa.net) and visit the sections on Program Design and Education and Training. (See also the Appendix in this guide.) These two sections provide a wealth of information on the specific types of programs your organization may be operating.

Another useful resource is *Guidelines for Effective Adult Basic Education Services* developed by the Massachusetts Department of Education, Adult and Community Learning Services (revised October 2004) (available at http://www.doe.mass.edu/acls/abeguide.pdf).

Useful information also was compiled from the survey conducted for this Resource Guide project:

- The vast majority of the organizations we surveyed (i.e., 72%) provide education-related workforce development programs, training (i.e., 66%), or other types of workforce development services (i.e., 88%) such as information and referral to further education training resources (i.e., 93%), and career exploration and development assistance (i.e., 76%).

- Limited job skills and low basic skills (including poor English skills) seem to be the most cited barriers to employment, advancement, and access to advanced forms of training and education among the clients served by the organizations in our survey. Consequently, the education and training services they provide are basic.

- Roughly half of organizations focus on the development of career ladders and related services. These organizations tend to adopt a long-term view that includes a sequencing of services that focuses initially on crisis management and the development of life and basic skills and gradually shifts toward skill development required for education, training, and employment that can lead to economic self-sufficiency.

- Case management or ongoing client follow-up and support is often identified as a critical navigation support function that allows the individual and his/her family to persist and progress along the self-sufficiency continuum.

Wrap-Around Support Services

• The Importance of Comprehensive Services

While assistance with education, training, and job placement are essential aspects of moving toward economic self-sufficiency, "wrap-around" services are also key. In all the research conducted for this and prior projects, interviewees highlighted the significant needs of their low-income clients, especially those "in crisis."

Unanticipated problems (e.g., losing child-care) can quickly set individuals back on their path to self-sufficiency. Until low-income families establish enough income, assets, stability, and reliable relationships to create their own safety net, they will need multiple support services to buffer the often rocky road to self-sufficiency.

The literature review conducted for this guide found that workforce-focused CBOs engage in a very broad set of activities in order to help move people toward self-sufficiency. These organizations provide both "deep"' and "wide"' supports and services. "Deep" supports and services are comprehensive, covering a host of family basic needs. Many families need a variety of supports in their journey toward self-sufficiency and seek help on multiple fronts. In addition to education and training, services provided may include safety and mental health services, food, housing, transportation, and childcare.

"Wide" refers to the time frame in which services and supports are provided. For many, the road to self-sufficiency is long and complicated. Stabilizing a family in crisis is often the first step a CBO must take. Once stable, families may need other supports, including pre-employment education and training. From here, the focus may shift to job placement and retention, continued skill development, and career advancement.

> ☞ **BEST PRACTICE HIGHLIGHT**
>
> Instead of placing clients in entry-level jobs, possibly following up with them for six months, and closing the case, the CALL is designed to work with clients on their long-term career plan and to work with employers to provide continual training.
>
> *--from the JVS case study in this chapter>>*

Community organizations that promote intergenerational self-sufficiency start even earlier, with a focus on children to promote learning and work values that will carry them through school, post-secondary training or education, and career start-up and advancement. Organizations that provide access to both deep and wide supports along the path toward self-sufficiency recognize that self-sufficiency requires much more than a promising entry-level job. These organizations consider the whole person or family and focus equal attention on connecting people to safe and affordable housing, childcare, and reliable transportation. Considerable emphasis is also placed on developing supportive social networks and a positive, forward-looking attitude.

• Approaches to Providing Wrap-Around Services

Organizations provide wrap-around support services through a variety of mechanisms. Large organizations with multiple types of programs can often provide many of the supportive services themselves, including child care, transportation vouchers, fuel assistance, and help with securing housing. In fact many CAAs are quite familiar with all or most of these programs and offer them to their constituents. Action for Boston Community Development (ABCD) in Massachusetts, for example, provides assistance for over 100,000 low-income people each year in one or more of its programs, including Head Start, Child Care Services, the Multi-Cultural Independent Living Center, Foster Grandparents, Family Friends, Youth Programs, LearningWorks Career Development Programs, Health Services/Family Planning, Housing and Homeless Services, Community Services, Elder Services, Fuel Assistance, Weatherization, Consumer Services, and Advocacy.

Smaller organizations, on the other hand, often find that they need to work with other service providers to establish access to supportive services. In fact, some larger organizations even might find this strategy advantageous or even necessary if the support required is beyond the

expertise of the organization. A good example of this is mental health assessments and treatment, which most workforce-focused CBOs are not likely to be qualified to deliver. (The chapter in this guide on working with other CBOs and service providers offers information and resources for engaging in these types of partnerships.)

Finally, many organizations reviewed have drawn up guides for what they consider to be important elements of a healthy life—for anyone, not just low-income or vulnerable populations. This is represented in the ROMA *Scales and Ladders* tool. Asian Neighborhood Design (AND) in San Francisco has developed a similar, yet slightly different list of "essential elements of a health community and family."

According to AND, no matter if they are in poverty or self-sufficient, "each person's life is a combination of strengths (assets) and weaknesses (barriers)"[28] and those who are self-sufficient have accumulated a critical mass of strengths.   In AND's experience, each person and family varies by the set of strengths that are important to attaining and maintaining self-sufficiency. Just as there is no certain program

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**Asian-Neighborhood Design
Essential Elements of a Healthy Community**

- **Income/Assets**
  Sources and level of income
  Accumulation of savings, other assets
  Debt and credit
- **Education/Skills**
  Academic achievement
  Job-related skills and experience
  Other relevant skills, hobbies, etc.
- **Housing/Food**
  Stability and security of housing
  Condition and affordability of housing
  Nutrition and adequacy of food
- **Safety/Environment**
  Crime in surroundings, risk to family
  Transportation, neighborhood services
  Personal perception of safety, freedom
- **Human Services**
  Health care
  Child care and teen care
  Substance abuse
  Other needs for services
- **Relationships**
  Primary or spousal relationship
  Parent and child/teen relations
  Relations with friends, co-workers
  Religious/cultural ties, etc.
- **Personal Attributes**
  Personal self-esteem, confidence
  Interpersonal, socialization skills
  Sense of hope and vision
  Life management skills

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[28] DeLeon, DeLynda and Maurice Lim Miller. "A New Approach for Our Communities' Long-Term Self-sufficiency: A Practice-Based Anti-Poverty Analysis." Asian Neighborhood Design Policy Brief. 1996.

for assisting these families, there is no one formula of strengths that guarantees self-sufficiency. Because the path to self-sufficiency is such an individualized process, AND assesses participants in their programs along all dimensions and connects them with supportive services to strengthen each dimension and turn it into an asset. This organization also tracks program participants along all seven elements. This tracking tool can be found in the report *Do You Know the Way to Self-Sufficiency: Using a Self-Sufficiency Framework to Guide Workforce Development Programs and Policies.*[29]

Wrap-around services take on various forms including assessment, advocacy, economic literacy, pre-employment assistance, employment supports, provision of post-employment resources, and ongoing support. The chart below illustrates the specific services in these categories. It was developed by MASSCAP as part of its 1999 Workforce Development Initiative.

Wrap-Around Services Provided by CAAs

Advocacy

Housing Assistance
Legal Supports
Economic Supports
CORI Screening
SORI Screening

Assessment

Economic Status
Educational Level
Employment Status

Asset Development

Individual Development Accounts (IDA)
First Time Homebuyers Program
EITC Outreach
Consumer Assistance

Basic Human Needs

Food Pantries
Fuel Assistance & Weatherization
Nutrition Assistance (WIC)

Economic Literacy

Household Budget
Credit History
Purchasing a Car
Purchasing a House

Employment Supports

Child Care
Head Start
After School Programs
Adult Basic Education
Family Literacy
Transportation

Ongoing Support

Case Management & Counseling
Career Ladder Planning
Information & Referral

Pre-Employment Assistance

Citizenship Classes
Substance Abuse Treatment
Skills Training
Education
Job Readiness

Post-Employment Resources

Career Counseling
Upgrading Education/Training
Case Management & Counseling

Often CAAs are not fully recognized for the wrap-around (or "support") services they provide. For instance, programs such as WIC, Fuel Assistance, Head Start, and Adult Basic Education are

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[29] http://www.masscap.org/workforce/fnlstudies9-24-3.pdf

often viewed as independent operations within a community. Typically, however, the local CAA is the umbrella under which the vast majority of such wrap-around services are provided. As a result, many CAAs represent a critical element of a successful workforce development network.

Program Barriers and Drivers

Respondents to the survey conducted for this project identified the following drivers for effective workforce development programs:

- Be straightforward and as open and honest as possible in any and all situations.

- Create a culture and continuum of dependability.

- Partner with many organizations.

- Be honest about a client's abilities and limitations.

- Display sensitivity to needs and be flexible.

- Develop knowledge of work environments.

- Capitalize on previous successful working relationships.

- Hire well-trained employees with a social-service background.

- Hire bilingual staff.

- Address issues of pre-employment drug testing.

- Verify that a primary and secondary child-care network is available to support parents in or preparing for the workforce.

- Establish and maintain positive relationships with union apprenticeship programs.

- Use employer reward-and-incentive programs such as Employer-of-the-Week.

- Establish advisory boards with stakeholders.

Surveyed organizations identified the follow potential program barriers:

- Poor follow-up with employers involved.

- A bad economy and a lack of jobs in the area.

- Lack of funding for a dedicated job developer.

- The health care financial crisis.

- The limited results in the short term, hindering a long-term vision.

- Limited funding opportunities.

Use of the Self-Sufficiency Standard

The Self-Sufficiency Standard, which is advocated nationally by the Washington, DC-based Wider Opportunities for Women's Family Economic Self-Sufficiency (FESS) Project, is viewed as an objective measure of what it costs for families across the county to meet their basic needs. The standard accounts for regional variation in cost of living and family composition and family size and is based on a family budget that includes housing, child care, food, transportation, health care, and miscellaneous costs such as clothing, shoes, household items, telephone, as well as federal, state and local taxes. (See Chapter 1 for more on the Standard.)

The Standard can be used by workforce development programs in the following ways:

- As a financial literacy tool for program participants to learn about the real costs of living and help them to develop realistic budgets.

- As a career counseling tool to help guide participants into appropriate educational and training tracks and career ladders that will lead to family-sustaining wages.

- To train program staff to identify quality jobs to guide participants toward family-sustaining wages.

- As an intake tool to assess the earning potential and wages needed by the participant to become self-sufficient.

- As a case management tool to assess participants' needs for work supports (e.g., food stamps, housing, Medicaid, Earned Income Tax Credit) and make appropriate referrals to access these subsidies to bridge the gap between their earnings and self-sufficiency.

- As an evaluative benchmark at the programmatic level to assess program success by tracking participants' wages before and after services (i.e., Are people's wages approaching self-sufficiency?).

For additional information on the Self-Sufficiency Standard and how to use it, the following resources are recommended:

- http://www.weiu.org/pdf_files/MA_Full_Report_Final.pdf.

- http://www.sixstrategies.org/

Measuring Results

• The Challenge of Measuring Results

CAAs offering workforce development services aimed at self-sufficiency need to track participants and measure their performance. How do CAAs determine whether they meet this goal?

In prior research, we documented the performance measurement systems of selected organizations that provide education, workforce training, and wrap-around support services across a self-sufficiency continuum. As it turned out, this was a near-impossible task. The key findings were:

> **BEST PRACTICE HIGHLIGHT**
>
> JVS created a comprehensive performance measurement system for the CALL that includes numerous measures beyond those required by the public workforce development programs.... Although this was an arduous task, the ability to track their "members'" specific progress in moving toward self-sufficiency is quite valuable and rewarding.
>
> *--from the JVS case study in this chapter>>*

- Almost no workforce development entities (nonprofit organizations or public agencies) track clients through self-sufficiency.

- Performance measures are tied to programs, which traditionally have provided time-limited employment and training services for specific populations. For this reason, most workforce development CBOs' performance measurement systems are not geared for measuring progress along a self-sufficiency continuum.

- Both the programs and the performance measures are clustered around one or two stages on the continuum model and do not measure client progress throughout the continuum.

- The most common performance measures in workforce development revolve around pre-employment training and job placement. Indicators typically include the number of participants completing training, the number placed in jobs, and the wage at which they were placed. Some welfare to work programs provide funding for support after job placement, often six months to one year. Additional indicators in these programs often include job retention rate and any job upgrades or wages increases during the follow-up period. Some incumbent worker-training programs use similar measures in addition to training completion rates.

- When mapped onto the "Path to Self-Sufficiency" model, these indicators report on outcomes only within the "at-risk" and "safe" stages toward self-sufficiency. Activities in the "in-crises" stage seem to be taken for granted, and CBOs engaged in this work get no "credit" for it within the traditional workforce performance measurement systems. At the other end of the spectrum, there simply are few services available for "stable" or "thriving" workers; therefore, there are no performance measures attached.

This prior research, however, revealed that a few organizations are making progress in the area of self-sufficiency driven performance measurement and evaluation. It further revealed the potential of *Scales and Ladders* as the foundation for assessment and evaluation beyond intake.

• Approaches to Measuring Results

Some agencies have attacked the challenge of measuring results. The *Scales and Ladders* Initiative provides a great foundation for measuring results. Operationalizing it so that data are collected, entered, and analyzed on a regular basis, however, will require agencies to:

- Adjust the data they currently gather to reflect the data elements included in *Scales and Ladders.*

- Develop and test an information management system to store data.

- Allocate staff and other resources for regular data collection, entry, cleaning, reporting, and analysis of longitudinal data.

- Articulation of policies, processes, and procedures that specify how results from analyses will be used to provide clients with feedback and make program improvements.

In addition, it might be advantageous for agencies to advocate with their funding sources to obtain access to earnings records of clients and to merge this information with information on client family size, composition, and income. This will create the opportunity to determine if individuals over time achieve earnings levels and family incomes that reach or exceed the Self-Sufficiency Standard advocated by the FESS Project.

Agencies may wish to examine the groundbreaking performance and results management work initiated by Jewish Vocational Service of Greater Boston. (See the first of the selected case studies below.)

Systems to collect data on clients and services exist within virtually all programs found at CAAs, but their design as well as the data they collect varies from program to program. This is due both to the nature of the services provided and to the dictates of a program's funding source(s). In addition, most individual programs at CAAs are evaluated regularly by their respective funding sources.

Also, CAAs are required under the federal Community Services Block Grant (CSBG)—through which they receive funding—to collect and report demographic data annually on all clients (for whom data can be obtained) served within all of their programs. These data include such characteristics as age, gender, income level/source, race/ethnicity, education level, employment, and others. Many CAAs have developed agency-wide electronic client databases in recent years to collect, aggregate, analyze, and report the data.

In addition, CSBG requires CAAs to track and report outcomes for those whom they serve. Outcome indicators are geared to the type of service the client receives. This information

enables CAAs to measure the progress of their clients, and also gives CAAs an important program evaluation tool. (See also the discussion on ROMA in Chapter 1.)

A Selection of Relevant Case Studies

In the research for this project, we asked organizations to describe innovative work or collaborations with partners in their local or regional workforce development systems. The case studies below capture these innovations and identify promising or best practices.

JEWISH VOCATIONAL SERVICE OF GREATER Boston (JVS)—
Centers for Careers and Lifelong Learning (CALL)
105 Chauncy Street
Boston, MA (http://www.jvs-boston.org)
Barbara Rosenbaum, CEO, JVS

Background

Focus of this organization/program: JVS's Center for Careers and Lifelong Learning (CALL) is unique in the workforce development field in general; however, for purposes of this Resource Guide, its most special feature is its comprehensive performance measurement system. In some ways, the CALL was a reaction *against* recent workforce development trends. Instead of providing short-term, one-time workforce development service to clients, the CALL is designed to support them for (their work-) life. Instead of placing clients in entry-level jobs, possibly following up with them for six months, and then closing the case, the CALL is designed to work with clients on their long-term career plan and to work with employers to provide continual training. Given the CALL's philosophy of doing business and JVS' commitment to measuring its performance, JVS created a comprehensive performance measurement system for the CALL that includes numerous measures beyond those required by the public workforce development programs.

Additional program documentation: See a profile of this program in the report *Do You Know the Way to Self-Sufficiency: Using a Self-Sufficiency Framework to Guide Workforce Development Programs and Policies* (available online at http://www.masscap.org/workforce/fnlstudies9-24-3.pdf).

Performance measurement and assessment

The CALL has six organizational goals:

- Goal 1: To provide information and planning assistance to enable low-income individuals to:
  - Understand career options, associated education or training requirements, and impact on earnings.
  - Make choices and plans of actions based on above factors.

- Goal 2: To ensure clients develop work and life skills needed to obtain and maintain employment and family-sustaining wages.
- Goal 3: To ensure clients develop an understanding of:
  o Strategies and resources for continued learning.
  o Various social/civic/employment systems and effective ways to access them in order to further develop educational and career potential.
- Goal 4: To assist clients in securing support services needed to ensure transition to employment and continued education.
- Goal 5: To work closely with employers to identify and build career ladders, improve hiring and retention practices, and obtain labor market information to improve services to clients.
- Goal 6: To create tools during the development process that support replication, and information and recommendations that lead to system changes.

Each goal includes several specific objectives, outcomes, and measures that require nine pages to list. Organizational goals 1 through 4 include client-specific objectives to measure their progress toward self-sufficiency. One type of measure in this performance measurement system is very innovative and client-centered. The CALL aims to help at least 85 percent of their clients meet their individualized short-term objectives (within six months or less). Objectives are "baby steps" toward longer-term client goals and are recorded in the client's Individual Career Plan. They include multiple types of learning and employment objectives, such as "obtain GED," "complete training course," "obtain employment," and "earn wage increase or job upgrade."

Under the first goal, CALL staff expects to provide detailed career plans and support for 100 percent of their clients, which currently number over 1,500. They also expect that they will help 85 percent of their clients to meet their short-term six-month training or employment objectives, which vary by client and can include earning a GED, completing a CALL training course, getting a job, or earning a wage increase or job promotion.

Goal two includes specific objectives to help clients attain job skills, economic literacy, life skills, and career planning skills. The CALL measures indicators including how many clients complete job training and economic literacy courses and demonstrate career planning knowledge. Staff are also held accountable for meeting job placement and retention rates, as well as certain wage rates at placement and six months post-placement.

Thinking long-term, under goal 3, CALL staff aim to assist a third of their employed clients to participate in further education or training within two years of becoming a CALL member. Under goal 4, CALL staff anticipates that they will help 90 percent of clients with identified support needs access support services through the human service network built by the CALL and/or through their on-line Resource and Referral Guide.

While it is true that other organizations may provide similar support service referrals and have similar hopes for post-secondary education for their clients, the CALL has gone a step further to measure it. And the CALL measures success throughout the continuum.

If the cliché "what gets measured gets done" is true, the CALL is *ensuring* that education, training, support services, job placement, continued education, and career advancement toward

long-term and durable self-sufficiency "get done" with their members. These goals apply to the entire CALL, no matter the program or funding stream; each and every unit is expected to contribute toward the completion of these goals. Integrating these expectations into unit work plans and staff job descriptions and performance reviews are key to this end.

To measure and document all of the outcomes that CALL staff have established for themselves, JVS had to develop a dynamic and complex, yet user-friendly, management information system. Although this was an arduous task, the ability to track their "members'" specific progress in moving toward self-sufficiency is quite valuable and rewarding. CALL leadership regularly request reports on progress in order to assess and improve program performance and assess and report progress with members.

Additionally, JVS has hired an independent, external evaluator to assess and report outcomes. According to the 2003 *Year Two Final Evaluation Report on The Jewish Vocational Service Center for Careers and Lifelong Learning*, by Workforce Learning Strategies, during fiscal year 2002, 1,142 participants set short-term employment or educational objectives. At the end of the reporting period, overall, 81 percent of the objectives had been met or were still in progress within the six-month timeframe (compared to the 85 percent goal). Eighty-nine percent of clients with an objective to complete training completed it within six months, and 78 percent of clients with an objective to get a job were placed. This outcome is impressive given the recent limited labor market opportunities for all workers, especially those with low skills.

TRAINING, INC.—Computerized Office Skills[30]
Sponsored by YMCA
18 Tremont Street, Suite 400
Boston, MA (http://ww.traininginc.org/boston.htm)
Anne Meyerson, Director, Training, Inc.

Background

Mission of this organization/program: (From organization's Web site) "Training, Inc., a national nonprofit organization, provides low-income individuals with job skills training that helps them obtain living-wage employment. The organization's curriculum offers the combination of technical training, soft skill development, and ongoing support that trainees need to find and retain good jobs."

"Programs provide participants with the skills to enter careers with good growth potential. By moving people off of public assistance and on to self-sufficiency, the Training, Inc. program benefits the government, taxpayers, and the families of its graduates."

Additional program documentation: See a profile of this program starting on page 25 in *Hard Work on Soft Skills: Creating a Culture of Work in Workforce Development*, by Ted Houghton and Tony Proscio, Working Ventures, Public/Private Ventures, October 2001: http://www.ppv.org/pdffiles/softskills.pdf

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Program overview

Purpose/intent/vision of this program: This program trains participants in "soft" and hard skills, using both classroom and office simulation (with emphasis on the latter). Training, Inc. is a national program that started in 1975 in Chicago (around the same time the Center for Employment and Training started). The Boston-based program was the third Training, Inc. started, and it is in its 20th year. Training, Inc. sites work in partnership with over 500 employers across multiple sectors (an occupational skills cluster model). Sites have also developed sectoral strategies.

Target population for this program: This program serves an urban population, but it serves six service delivery areas, including the North Shore, Woburn, Medford, Brockton, and just about any community on the subway or commuter rail.

The program serves:
- Unemployed individuals such as welfare recipients and others in and out of the labor force, especially those on unemployment and displaced workers affected by mass layoffs.
- Underemployed individuals.
- Limited English-proficient individuals.

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[30] Training, Inc. has six full-time and one part-time staff. They operate as a team, with each staff person working directly with trainees in some capacity from the trainee's first day. This team approach helps to ensure that all staff are capable and ready to assist trainees as needed. Information on Computerized Office Skills collected from interviews with Elsa Bengel, VP/Executive Director of YMCA Education & Training and Anne Meyerson, Training, Inc. Director.

- Immigrants and refugees.
- Minority populations.
- Persons with disabilities.
- Persons with criminal records.
- Individuals living in poverty.

Additionally, the program serves individuals with multiple barriers:
- Language barriers.
- Literacy barriers.
- Life and job skills barriers.
- Lack of transportation.
- Lack of child care.
- Lack of health care.
- Lack of access to workforce development system.
- Lack of computer literacy.

Process for determining if clients are part of the target population: Many trainees come to the program though the One-Stop Career system and have funding through an Individual Training Account (ITA), although some are able to use private scholarships. Although the program's most received funding was for 16 welfare recipients, it had more trainees in the past when more funding was available. Additionally, some trainees may be on a Mass Layoff grant, i.e., airport workers.

Prospective trainees complete an application, receive a tour and basic information on the program, engage in a one-on-one interview, and take a basic skills test. Very few applicants are turned away. All trainees must have a high school diploma or General Educational Development Diploma (GED); however, the program may take some students who are in the process of earning their GEDs. Generally, trainees must have stable support service plans in place before they start training. However, Training, Inc. staff do provide some help with problem-solving any support challenges.

This program trains people for in-demand office jobs across all major industry sectors. This need was determined when program staff saw an increase in job offers for office jobs.

Design of the program

Main components and structure of the program:
Training: The training program lasts four months, running 35 hours/week from 9:00 a.m. to 4:00 p.m. During the first seven weeks of training, trainees learn skills such as business communication, keyboarding, customer service/receptionist, Microsoft Office skills, etc. During the next two months of the program, trainees participate in a workplace simulation, move into unpaid part-time internships while they continue to develop specialized skills, and launch their job search. In the workplace simulation, trainees gain real-world experience by running a simulated business. All classroom training stops and the simulation is strictly adhered to. Trainees' progress is charted on individual spreadsheet progress reports throughout the program for staff and trainees to track learning gains.

Job placement: The single job developer in the program assists trainees with finding employment. It should be noted that trainees are responsible for taking the initiative to locate potential jobs using the job board and other resources at Training, Inc.; however, the program does provide a significant amount of help with resume and cover letter writing, interviewing, and other job search skills. Employer partners assist with job search and refer job openings to the job developer.

Case management/support services: This program does not provide traditional case management or direct support services. Instead of "managing" a "case," Training, Inc. staff work with trainees in a "problem solving process" to help them figure out how to solve their own support service needs. Each Training, Inc. staff person is a "supervisor," and each trainee has a supervisor (a "coach" who serves as the initial contact person for problem solving).[31] These supervisors can provide some referrals to resources, but there is no direct traditional case management support. This model strictly follows the workplace simulation theory in that workers in the real workplace do not have case managers; they have to solve their own problems. However, Training, Inc. provides more coaching and supportive supervision than is found in the workplace to help trainees think and work through their challenges. One staff person is a counselor and assists trainees with crises or severe barriers. The director also helps with these situations as needed. Additionally, the program allocated Wednesday afternoons for trainees to make appointments and deal with family needs.

Post-job placement services: Once trainees graduate from the program, they can and do return for more job help or support. In the current economy, staff may work with graduates for several months to gain employment. However, formal client follow-up is no longer a funded part of the program, except for participants from the Department of Transitional Assistance. One interviewee indicated that she thought that about 20 percent of the graduates did return to the program for follow-on services, mostly involving employment. Staff noted that, with 3,000 total graduates, it can be difficult to follow up with most. A particular challenge is that graduates are very mobile and do not often provide updated contact information. The national Training, Inc. office has provided the program with a comprehensive client tracking database (in Lotus Notes format); however, the organization has limited time and resources to use this system beyond minimal data entry. Staff and the program director use this system and other management information processes to track and report data on enrollments, job placement, and other outcomes important to funders.

Partnerships: The program has informal relationships with various service providers for referrals. Additionally, the program relies on over a hundred volunteers to review resumes, do mock interviews, make class presentations about jobs and the workplace, conduct workshops, etc. Many of the volunteers are recruiters from the program's employer partners.

Employer involvement: This program works extensively with over 200 employers, who help with day-to-day program activities and assist with job postings and hires. Additionally, employer partners work with Training, Inc. staff to develop industry-driven training curricula.

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[31] Five of the six full-time staff serve as supervisors. These five supervisors coach approximately 42 trainees per four-month cycle.

Funding: Most funding is from vouchers including ITAs, some welfare-to-work funds,[32] Mass Layoff funds, and private scholarships. Very little or none of the funding is performance-based. The Department of Transitional Assistance (DTA) contract and Workforce Investment Act (WIA) funding are contingent on performance, primarily placements.

Performance measurement and assessment

Goals/outcomes for this program: The most significant goals of this program are training completion, job placement, and job retention. The faltering economy is making achievement of any of these goals challenging; however, by extending job search as long as necessary, Training, Inc. is meeting its placement benchmarks (although not within 90-day timelines in some cases.)

The program does not set strict overall goals for itself; however, staff members do attempt to place graduates in jobs that pay closer to a living wage than minimum wage (i.e., $10 to $16 hourly wage). Generally, this program strives to attain performance goals as set by each funding source. For example, state funders require a placement rate of 60 percent.

Furthermore, goals are articulated based on funding source; they are not articulated along a self-sufficiency continuum.

Finally, goals are measured using a combination of paper and electronic systems. Generally, when a funder asks for performance measurement information, the job developer or executive director provides the information directly to the funder on an ad hoc basis. The organization also creates and uses enrollment, placement, and trainees progress reports for use in each training cycle. The results of the performance measurement systems are used to improve program management and to report to funders on an "as needed" basis.

Program achievements: In 2001, the program had a placement rate of 95 percent; however, due to the weakening economy, this rate has fallen to 70 percent. Nevertheless, this was still above the 60 percent required by state workforce programs. An ESL/Accounting Support program was discontinued in January 2003 because placement rates were below the standard. Additionally, the program attempts to place graduates in full-time jobs with benefits earning $10 to 16 per hour. The average starting wage was $11.58 in 2001. The current average starting wage is $11.75 per hour; however, more recently, staff have noticed a disturbing trend: the lower end of the range of starting wages has fallen. Some graduates have had to start at wages as low as $8.50 per hour. Interviewees noted that such a low wage does not support a family and it demonstrates the inconsistency of entry level wages for similarly trained workers.

Additionally, the program has high retention rates. Staff attributes these rates to motivated trainees and the program partnering only with "good" employers who have a track record of investing in employees by offering full benefits, additional training, and growth opportunities.

Program impact: In 1992, the Ford Foundation funded a survey of 1,000 program graduates up to 10 years post-graduation to understand the longer-term impacts of the program. There

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[32] Recent cuts in Massachusetts' employment services program (ESP), resulted in Training, Inc., losing some funding for trainees; however, the Mayor of Boston reinstated enough funding for current trainees to complete their program. ESP funding for the next budget year is in doubt.

were several positive impacts reported. For example, one-third of the graduates had continued their education; of those with college-age children, 50 percent had children enrolled in college; incomes increased, among others.

Conclusion

There is some concern about the decreasing number of entry-level jobs available in this country due to automation and companies moving jobs overseas. Additionally, the high unemployment rate in the current labor market forces Training, Inc. graduates to compete against college graduates for good paying office jobs. However, the program staff is aware of industry needs and alters the training curriculum as necessary to improve the employment rate of their graduates. They have found that, over the past two years, the health care/insurance/claims sector has produced the most office support jobs for their trainees.

EL PUENTE COMMUNITY DEVELOPMENT CORPORATION (CDC)
El Paso, TX (http://www.mujerobrera.org/history.html)
Jena Camp, Bilingual Workforce Development Coordinator[33]

Background

Mission of this organization/program: (From Web homepage 2002) "Our overall mission is to improve the standard of living of low-income women workers and their families in the El Paso area, including their access to 7 basic needs: housing employment, education, health, nutrition, peace, and political participation. We do so through a comprehensive program that weaves together education, community and economic development, outreach, advocacy, and community organizing and services."

"Specifically our work focuses on educating, organizing, and developing leaders who are workers, focusing principally on the leadership development of women who were the most affected by economic changes toward a global economy."

"For twenty years this grass roots organization has worked with low income workers of Mexican heritage in the El Paso area. Our organization is based in the community and lead by women, mothers, and women workers."

Program overview

Purpose/intent/vision of this program: To create a level of economic self-sufficiency for mature female workers in the community who have experienced job displacement because of the widespread effects of the North American Free Trade Agreement (NAFTA). The goal is to create economic alternatives, and not just training, for these women. These Spanish-speaking women have worked successfully in the garment industry for decades. They have little experience or success in English-driven jobs in the service industry or plastics industry, which are the traditional re-training opportunities in the area. This program strives to create a project-

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[33] This edited profile is reprinted with permission from a joint Commonwealth Corporation-Center for Law and Social Policy publication on innovative practices for immigrants and refugees (forthcoming).

based learning environment where these women learn about options that are available; become more business savvy; and receive the entrepreneurial training needed to start their own "social purpose businesses."

Target Population for this program: This program serves urban (South Central El Paso) populations. In addition, it serves:

- Unemployed individuals such as welfare recipients and others in and out of the labor force
- Underemployed individuals
- Limited English-proficient individuals
- Immigrants
- Minority populations
- Persons with disabilities
- Individuals (and families) living in poverty

This program serves individuals with multiple barriers, including:

- Language barriers
- Literacy barriers
- Life and job skill barriers
- Lack of child care
- Lack of health care
- Lack of access to workforce development system

How do you determine the target population? This is a worker-lead program that is available to women in the South Central area of El Paso who are in need of services.

Design of the program

Main components and structure of the program: La Mujer Obrera and the El Puente CDC provide a three-part program to help women create their own "Social Purpose Businesses". The first step for the women is learning about growth opportunities and career ladders that might be of individual interest. This work is done in the native language so the barrier of having to lean English before beginning a career exploration is removed. Once an area of interest has been identified, the core knowledge required for that particular career is taught in Spanish and the practical knowledge (project based activity) in English. The last step of the process is to help the participants obtain the "system level" knowledge needed to actually run a business. This is where they learn how to make informed decisions about their career choices.

There are currently five social-purpose businesses where women are developing new careers and businesses: day care providers, senior services providers, food service, property management, and SCRUBS (non-profit businesses that manufacture clothing for the health care industry). SCRUBS was recently awarded the grand-prize in the Yale Goldman Sachs Non-Profit National Business Plan Competition, and has been recognized by the SBA and the Ms. Foundation in New York.

The other major component of this program is the Learning Community Resource Center. After losing funding for their school, the CDC is trying to create a Resource Center for the workers as well as for other professionals interested in this unique approach to workforce development.

The Resource Center is where workers attend computer/technology, ESOL, and GED classes. They are now seeking funding to expand the Resource Center for both the workers and workforce development professionals and to begin modification of some of the curricula that have been developed for La Mujer Obrera.

Partnerships: The CDC's strongest partnership is with John Hopkins University and the research of Robert Slavin. Professor Slavin's work primarily focuses on school reform in the elementary grades, but the staff at the Resource Center are adapting his project-based work for adult learning. The Youth Job Corps has also been a strong partner for the program.

The CDC has also developed a national consortium of industry and business partners, practitioners, researchers and workers to guide the research on bilingual workforce development. They are currently looking for funding to bring this research to implementation.

Performance measurement and assessment

General goals/outcomes for this program: The goal for this program is for people to experience business success and to have a full understanding of all aspects of business development. Performance in ESOL uses standard measures to demonstrate gains. Attaining a GED would be a personal goal and is not tied to the employment agenda.

The results from the performance measurement systems are used to improve program management, report to the state, and report to the public.

Conclusion

This is a worker-centered, performance-driven, bilingual program that provides new sources of social, educational, and economic opportunities to the displaced workers in South Central El Paso. This program creates enterprise development and offers bilingual training as well as access to technology. The CDC promotes community revitalization through building the capacity of individual families to decide and design futures. El Puente is helping the workers to regain access to opportunities in the global economy, and promoting pride of ownership in viable, diversified, sustainable businesses originating in their own neighborhood.

CHURCH AVENUE MERCHANTS BLOCK ASSOCIATION, INC. (CAMBA)

BROOKLYN, NY (http://www.camba.org)
Kathleen Mather, General Council for CAMBA[34]

Background

Mission of this organization/program: CAMBA is a CBO whose mission is to assist community members as they move to economic and social self-sufficiency and to assist emerging small businesses in the community. CAMBA was originally established as a merchant's association focused on the needs of refugees. CAMBA is now one of Brooklyn's largest community-based social service organizations and it has recently restructured to integrate all its programs under the umbrella of workforce development. CAMBA services over 24,000 individuals each year and is funded city, state, federal, and private funds.

Program overview

Purpose/intent/vision of this program: CAMBA has been in existence since 1977 and includes a wide variety of programs. The workforce development programs include job training, job placement, ESOL, and case management. These programs are all designed to help members of the community attain economic self-sufficiency and to prevent refugees from entering the welfare system.

Target Population for this program: This program serves urban populations. Additionally, it serves:
- Unemployed individuals such as welfare recipients and others in and out of the labor force
- Underemployed individuals
- Limited English-proficient individuals
- Immigrants and refugees
- Minority populations
- Persons with disabilities
- Individuals (and families) living in poverty
- Other: People lacking in legal status

This program serves individuals with multiple barriers, including:
- Language barriers
- Literacy barriers
- Life and job skill barriers
- Lack of child care
- Lack of health care
- Lack of access to workforce development system

How do you determine the target population? Many people are referred to CAMBA by the city welfare system, for some programs they must be WIA eligible and non-English speakers. Determining eligibility for any of the CAMBA programs depends on the individual funding requirements for each program.

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This program primarily trains refugees for entry-level positions. Many of the clients come with advanced degrees in their country of origin, but must take entry-level employment because of the language barriers.

Design of the program

Main components and structure of the program: Job training programs focus on training that lead to jobs in the following fields:
- Private security, non-profit organizations such as museums offer long-term employment with good benefits
- Human services, non-profit organizations are among the largest employers in the area with needs for human services staff
- Retail
- Customer service
- Family day care

A major factor, in developing these training programs, is understanding the cultural biases that many of the refugees bring with them to the work environment. For example CAMBA has a well-established program to train women in private security. It offers good benefits, a reasonable work environment, and an opportunity for growth; however, many women from Eastern Europe saw this as work for their husbands. It has taken several years to overcome this bias among the women served by CAMBA. Each CAMBA program is unique and designed to adhere to the individual funder's requirements and the needs of clients.

CAMBA also acts as a first-time lender to small businesses in Brooklyn. A program called *Trickle Up* provides first-time entrepreneurs loans up to $15,000 and an 8 week training class for new business owners.

Wrap-around services are managed through referrals to other city and state agencies.

Partnerships: CAMBA has a wide variety of partnerships with city and state agencies that serve this population.

Employer involvement: The program has many partnerships with local businesses.
A Development Coordinator works with large companies in the area to establish long-term partnerships that offer benefits to both the business and clients. Companies such as *Bed, Bath and Beyond* are an integral part of the retail training program. Other businesses attend and present at classes and job fairs.

Performance measurement and assessment

General goals/outcomes for this program: Until recently CAMBA used the traditional measures for job retention and contract requirements as their performance measure for each program. The company is currently undergoing a complete reorganization of its performance measures. The agency is now developing "result outcome goals" for each person in the agency that are tied to their individual contracts and to those of funders.

The development of continuous improvement goals for the agency will be the next step in this process. Currently each program uses the MIS system required by their funder. This has lead to a confusing array of data that makes it extremely difficult to track agency outcomes. CAMBA is in the process of developing a sophisticated MIS system that will allow the agency to centralize data management for all their programs. This new system will also provide greatly improved long-term tracking of client progress in the workforce.

The results from the performance measurement systems are used to improve program management, report to the state, and report to the public. This need for accurate performance management is the driving force behind the development of the new MIS system.

Conclusion

"The diversity of the immigrant population in this area of NYC is what drives the changes in the CAMBA programs. Each year brings a new wave of refugees with new needs. This has been a difficult year for the organization in trying to meet the goals of individual contracts. Funding cuts, extreme limitation on the people that can be served by individual contracts, and organizational changes within CAMBA have presented many challenges this past year. However, in spite of these limitations and challenges they feel they are 90 percent successful with clients who are enrolled in an appropriate program."

Tools and Resources

The following materials may be of use in operating your workforce development program, or they may serve as models for developing tools specific to your program approach:

- SCALES AND LADDERS GUIDANCE
  http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/Guide.DOC

- FAMILY SCALES AND LADDERS INTAKE FORM
  http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/FORM-1.doc

- FAMILY SCALES AND LADDERS SUMMARY FORM
  http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/FORM-2.doc

- WORKPLAN 2005. This provides an example of how ROMA works as a tracking and planning system.
  http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/AnnApp/WP.doc

Also, a version of the Scales and Ladders assessment tool is provided on the next page.

PROGRAM: _____ NAME OF CLIENT: _____ NAME OF CASE MANAGER: _____

☐ 1ST ASSESSMENT (INTAKE) DATE: _____ ☐ 2ND ASSESSMENT DATE: _____ ☐ 3RD ASSESSMENT DATE: _____

☐ 4TH ASSESSMENT DATE: _____

NOTES:

_____

SCALES → LADDERS ↓	Employ-ment	Education & Literacy (Child Education)	Education & Literacy (Adult Education)	Health	Youth & Family Development (Childcare)	Youth & Family Development (Family Development)	Housing	Income Management	Transportation (Linkages)	Resident Participation	Nutrition
THRIVING	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:
STABLE	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:
SAFE	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date:__ Date:	☐ Date: Date:	☐ Date: Date:
AT-RISK	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:
IN-CRISIS	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date: Date:	☐ Date:__ Date:	☐ Date: Date:	☐ Date:_ Date:_

Summary of Key Points

This section presents key points from this guide that should be considered at appropriate junctures in the context of workforce development programs. Information relevant to community-based organizations (CBOs) generally is presented first, organized by the main topic areas of this guide. Immediately following, are points likely to be of specific interest to Community Action Agencies (CAAs).

• Key Points for CBOs Generally

Planning for a Workforce Development Program

- Make a commitment to assisting clients with career advancement and self-sufficiency.

- Understand the organization's role in the workforce development system through strategic planning and community audits.

- Establish a dual focus, serving both workers and their employers.

- Make sure the internal agency structure, organizational goals, and funding sources support the vision of assisting clients move toward self-sufficiency.

Working with the Workforce Development System and Establishing Partnerships

- Other CBOs engaged in employment, education, training, and wrap-around support services can be valuable partners in the network of supports for those in poverty.

- CBOs with a vision of career advancement must factor in partnership with some post-secondary education institution in order to provide the important "next step" education and training opportunities required for clients to move up in their careers.

- The dual focus on workers and employers is key to making workplace programs work.

- Effective CBOs take a strategic position in the public workforce development system by understanding and communicating the role(s) they can play in it and by becoming involved in it.

- Participant recruitment, assessment, and case management should be tailored to the individual.

- Job placement, retention, and advancement should be strategic, should start early in the process of working with a client, and should focus on the longer-term required for career advancement.

- Education and training programs should be carefully tailored to the local labor market needs and should meet the needs of the CBO's dual clients – workers and employers.

- Wrap-around support services often are essential for low-income adults to move from poverty to self-sufficiency.

- Unless organizations set realistic goals and measure themselves against them regularly, they have no idea how well they are doing in assisting clients in their path from poverty to self-sufficiency.

• Key Points for CAAs in Particular

- CAAs locally and nationally vary greatly in the extent to which they provide direct workforce development services (i.e. skills training, workforce readiness).

- CAAs play a vital role in the workforce development system, yet few recognize that their wrap-around services are, in fact, part of a workforce development continuum.

- CAAs often shy away from developing skills training and workforce education programs, mainly due to their inexperience working with the private for-profit sector. As a result, CAAs, and their millions of clients, often miss out on opportunities to enhance their experience and skills.

- The vast majority of CAAs do, however, have expertise in other important areas that contribute to an individual or family's success in attaining economic self-sufficiency.

- CAAs can be viewed as experts in crisis intervention, case management, support services, and basic skills development with their target customers being people living in poverty. This is not to suggest that CAAs must be direct providers of the entire gamut of workforce development services, but it is imperative that they identify their areas of expertise, view themselves as key players in the system, and position themselves to be formal partners in the workforce development networks in their areas.

- CAAs as well as the clients they serve would benefit from taking a more comprehensive approach to workforce development by pursuing greater coordination with other workforce development institutions (e.g., One-Stop Career Centers, Workforce Investment Boards) and by establishing better mechanisms for tracking individual and family outcomes along a self-sufficiency continuum.

Appendix A.1 ━━━━━━━━━━━━━━━

Resources

Sources of Information Noted in the Guide

Background and Context

Documents

Do You Know the Way to Self-Sufficiency? A Case Study Report on Using a Self-Sufficiency Framework to Guide Workforce Development Programs and Policies, 2003
http://www.masscap.org/workforce/fnlstudies9-24-3.pdf

Understanding Workforce Development: Definition, Conceptual Boundaries, and Future Perspectives, 2002
http://www.umanitoba.ca/unevoc/2002conference/text/papers/jacobs.pdf

Low-Wage Workers in the New Economy, 2001
http://www.urban.org/pubs/low_wage

Massachusetts Self-Sufficiency Scales and Ladders Assessment Matrix
http://www.roma1.org/files/rtr/MA_Scale.doc

The Self-Sufficiency Standard for Massachusetts, 2003
http://www.weiu.org/pdf_files/SSSReportOriginal.pdf

The Self-Sufficiency Standard: Where Massachusetts Families Stand, 2000
http://www.weiu.org/pdf_files/WMFSFinalVersion.pdf

Self-efficacy as a Welfare-to-Work Goal: Emphasizing Both Psychological and Economics in Program Design, 2003
http://www.pmatch.org/self_effic_june_othree.pdf

Massachusetts FY2002 Performance Measures Report
http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/_default.HTM#Additional_Program_Information

Summary of Findings and Recommendations of the 1999 Final Report on the MASSCAP Workforce Development Initiative, 2000
http://www.masscap.org/reports/wiap-1.html

Web Sites

Office of Adult Services in the U.S. Department of Labor's Employment Training Administration
http://www.doleta.gov/programs/adult_program_more.cfm and
http://www.doleta.gov/programs/adult_program.cfm

Planning for a Workforce Development Program

Strategic Planning Process: Steps in Developing Strategic Plans
http://www.gse.harvard.edu/hfrp/pubs/onlinepubs/rrb/strategic.html

Strategic Planning in Nonprofit or for-Profit Organizations
http://www.mapnp.org/library/plan_dec/str_plan/str_plan.htm

Practical Strategic Planning for Workforce Boards
Available for nominal cost from the Commonwealth Corporation, The Schrafft Center, 529 Main Street, Suite 110, Boston, MA 02129, (617) 727-8158.

Building Career Ladders for Low-Wage Workers: A How-To Manual for Workforce Development Practitioners and Partners
Available for purchase from the Boston Workforce Development Coalition, 165 Brookside Avenue, Jamaica Plain, MA 02130, (617) 522-6028.

Massachusetts Department of Education Adult Basic Education Community Planning Process: Strategic Planning Guide
http://www.doe.mass.edu/acls/news/2003/community/spguide.pdf

Conducting A Community Audit: Assessing the Workforce Development Needs and Resources of Your Community
http://www.workforceatm.org/sections/pdf/2003/condanaudit.pdf

Massachusetts Department of Housing and Community Development's CSBG Community Action Plan Development Guide
http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/default.HTM#Additional_Program_Information

Workforce Intermediaries for the Twenty-First Century
Robert P. Giloth, editor. Published in association with The American Assembly at Columbia University, 2004.

Responding to a Changing Labor Market: The Challenges for Community-Based Organizations
Peter Plastrik of Integral Assets, Inc. with Judith Combes Taylor of Jobs for the Future (JFF), 2001.

Fixing a Flat at 65 Mph: Restructuring Services to Improve Program Performance in Workforce Development
http://www.ppv.org/pdffiles/changingflat.pdf

Above and Beyond the Call of Duty: A Case Study
http://www.workforceusa.net/uploads/CaseStudyfinal2.pdf

Managing Non-Profits in Workforce Development: A Roadmap to Success
http://www.cael.org/publications_research_ whitepapers.htm

Working with the Workforce Development System and Establishing Partnerships

Merrimack Valley Workforce Investment Board Labor Force Blueprint (Northeast Massachusetts)
http://www.mvwib.org/resources/ default.php

New York City Workforce Investment Board Labor Force Blueprint
http://workforcenewyork.org./ annualreport02/annualreport02nyc.pdf

The Economic Benefits of Sub-Baccalaureate Education: Results from National Studies
W. Norton Grubb, in *CCRC Brief* (Community College Research Center, Teachers College, Columbia University), June 1999.

Help Wanted...Credentials Required: Community Colleges in the Knowledge Economy
Anthony P. Carnevale and Donna M. Desrochers, Educational Testing Service, 2001.

CTE Contributions to Learning and Earning
Michael E. Wonacott, *In Brief*, no. 11, National Dissemination Center for Career and Technical Education, 2001.

Career Advancement for Low-Income Workers Through Community College and Community-Based Organization Partnerships
http://www.kwfdn.org/Resources/publications.html

Creating Beneficial Institutional Collaborations
http://www.gseis.ucla.edu/ERIC/digests/dig9902.htm

The Best of Both: Community Colleges & Community-Based Organizations Partner to Better Serve Low-Income Workers and Employers
http://www.ppv.org/ppv/publications/

Building a Career Pathways System: Promising Practices in Community College-Centered Workforce Development
http://www.workforcestrategy.org/6_1.html

Building Effective Employer Relations
http://www.aspenwsi.org/publications.asp?cid=5

Workforce Intermediaries for the Twenty-first Century
Robert P. Giloth, published in association with The American Assembly, Columbia University by Temple University Press: Philadelphia, 2004.

Operating a Workforce Development Program

Documents

Countable Outcomes Policy
Massachusetts Department of Education (Adult and Community Learning Services)
http://www.doe.mass.edu/acls/pawg/co_manual.html?section=narrative

A New Approach for Our Communities' Long-Term Self-sufficiency: A Practice-Based Anti-Poverty Analysis
DeLeon, DeLynda and Maurice Lim Miller. Asian Neighborhood Design Policy Brief, 1996.

Tools (Massachusetts)

Scales and Ladders Guidance
http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/Guide.DOC

Family Scales and Ladders Intake Form
http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/FORM-1.doc

Family Scales and Ladders Summary Form
http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/FORM-2.doc

Workplan 2005
Example of how ROMA works as a tracking and planning system.)
http://www.mass.gov/dhcd/components/cs/1PrgApps/CSBG/AnnApp/WP.doc

Web Sites with Useful Information for CAAs

National Community Action Foundation (NCAF)
http://www.ncaf.org/

Directory of Community Action Agencies and State Associations (from NCAF site)
http://www.ncaf.org/linkcaas.htm

Best Practices and Innovative CAA Projects (national)
http://www.virtualcap.org/

Ohio Association of Community Action Agencies (OACAA) – Best Practices
http://www.bestpractices-communityaction.org/index.htm

National Association for State Community Services Programs (NASCSP):
Community Service Block Grant (CSBG) publications, promising practices, research and reports
http://www.nascsp.org/

Community Action Partnership
http://www.communityactionpartnership.com/

Results Oriented Management and Accountability (ROMA) for CSBG Activities
http://www.roma1.org/index.asp

US-HHS, Administration for Children and Families, Office of Community Services (ACF/OCS)
http://www.acf.hhs.gov/programs/ocs/

US-HHS, ACF, Office of Planning, Research and Evaluation
http://www.acf.hhs.gov/programs/opre/indexpub.htm#TOP

Web Sites for Related Research and Publications

Manpower Demonstration Research Corp. (MDRC)
http://www.mdrc.org/index.html

The Finance Project Research and Publications
http://www.financeproject.org/

Center on Budget and Policy Priorities
http://www.cbpp.org/

Northwestern University/University of Chicago Joint Center on Poverty Research
http://www.jcpr.org/

American Public Human Services Association
http://www.aphsa.org/home/news.asp

University of Wisconsin, Institute for Research on Poverty
http://www.ssc.wisc.edu/irp/

Center for Law and Social Policy (CLASP)
http://www.clasp.org/

The Urban Institute
http://urban.org/

W.E. Upjohn Institute for Employment Research
http://www.upjohninst.org/

National Association of Workforce Boards
http://www.nawb.org/asp/wibdir.asp

Appendix A.2

WorkforceUSA.net

(From the WorkforceUSA.net web site.)

What is www.workforceUSA.net?

WorkforceUSA.net is a "library portal," a virtual library of workforce development resources, providing access to the best tools and materials available from hundreds of organizations. It uses a sophisticated database that supports easy resource entry, access to previously unpublished tools; and the creation of customized search fields.

How Can This Site Be Used By Community-Based Organizations to Promote Self-Sufficiency Through Workforce Development Programs?

This site can serve several useful purposes for CBOs, including:

✧ **Providing access to a variety of useful analyses, examples, tools, and other resources specific to workforce development planning and programming.** WorkforceUSA.net defines "workforce development" broadly and, therefore, includes a wide range of resources developed for and by the CBO world as well as other communities of practice. Listed on pages 2 and 3 below are specific areas of the site that are especially relevant to workforce development, although you may want to explore other areas as well.

✧ **Reducing search time for information and materials for CBOs.** This website has three special search tools that will make finding good resources easier for CBOs: (1) use the "Keyword search" to find resources by a particular word or phrase; (2) under the "Strategy search," go to "Asset Development" or "Career Path" to find relevant resources; and (3) also under the "Strategy Search," practitioners will find various relevant topics under "Population." Practitioners may find other searches useful for their work, i.e., "Industry."

✧ **Providing a personalized space right on the site for CBO practitioners to store useful resources and to sign up for periodic electronic newsletters relevant to your work.** When you register on the site (recommended but not required), you create your own profile and a space for a personalized "mini-library" of resources on the site that you want to bookmark for future use.

✧ **Facilitating peer-to-peer exchange.** This website includes a user rating system to rate the usefulness of resources and comment on them. With this tool, you can read what other users thought of specific resources and share your thoughts with them.

The following lists specific areas of the website that CBO's seeking to increase self-sufficiency through workforce development may find useful. To access resources in a particular topic area go to the www.workforceUSA.net site and use the tabs to navigate the site.

WorkforceUSA.net is organized by 10 different "function" areas, each with multiple topics and subtopics. Resources include analysis, case studies, examples, websites, employer tools, and tools, legislation and official guidance, and policy recommendations. Within this library, several areas stand out as very relevant to CBOs in workforce development. These areas are outlined below. To access them, users should go to the WorkforceUSA.net site map and click on the relevant area. Also, the home page of the site is organized like a map to the various areas, so users can click to their desired topic by starting with the map on the homepage.

PLANNING FOR WORKFORCE DEVELOPMENT

Labor Market Analysis
- Jobs, occupations, and career ladders
- Regions and regional analysis

Labor Market Systems
- Funding
- Performance standards and measurement
- Programs and policies
- System thinking and system reform

Program Design
- Planning new programs

Program Management
- Financial and organizational systems
- Organizational fundraising and communications
- Organizational planning and governance
- Program staffing and supervision

Career Development
- Career Advancement

WORKING WITH THE WORKFORCE DEVELOPMENT SYSTEM AND ESTABLISHING PARTNERSHIPS

Labor Market Analysis
- Employers, industries, and sectors

Labor Market Systems
- Institutions
- Partnerships

Workplace Practices
- Logistics: facilities and schedules
- Management and leadership
- Retention, reward, advancement, and performance evaluation strategies
- Work organization

OPERATING A WORKFORCE DEVELOPMENT PROGRAM

Labor Market Systems
- Performance standards and measurement

Program Design
- There are various topics in this section that related to CBOs' work in designing programs, including information on the design of various types of programs, how to plan new programs, and how to recruit participants and employers. Users should browse this section of the site if they want to learn more about good program design practices.

Program Management
- Managing and improving service delivery

Labor Exchange
- There are various topics in this section that related to CBOs' work in helping workers and employers connect to each other. Users should browse this section of the site if they want to learn more about good labor exchange practices.

Assessment
- There are various topics in this section that related to CBOs' work in assessing jobs and workers. Users should browse this section if they want to learn more about good assessment practices.

Training and Education
- There are various topics in this section that related to CBOs' work in providing training and education to workers, including adult basic education, ESOL, training in specific industries, workplace-connected programs, and connections to post-secondary education. Users should browse this section if they want to learn more about good education and training practices.

Career Development
- Career advancement
- Career planning
- Work readiness

Workplace Practices
- There are various topics in this section that related to CBOs' work in helping employers improve their workplace practices for workers. This is an especially good section for CBOs that have strong relationships with employers and can advise on improving workplace practices. Users should browse this section if they want to learn more about good workplace practices.

Other Supports
- There are various topics in this section that related to CBOs work in providing or connecting workers to various other supports. These include childcare, domestic violence help, employee assistance programs, financial planning, health care, housing, income supports, transportation, etc. There also is a special section on "Asset Development." Users should browse this section if they want to learn more about providing other supports for workers.

If you have recommendations for additional resources to add to this site, please e-mail Vickie Choitz at FutureWorks: Choitz@futureworks-web.com. The website was created by Workforce Learning Strategies with funding from the U.S. Department of Labor, the Ford Foundation, and the Rockefeller Foundation. For more information on the site, contact Vickie Choitz (at the e-mail address above) or Suzanne Teegarden (teegardens@aol.com).

Appendix B ━━━━━━━━━━━━━━━━━━

Contact Information from the Project Survey

Organizations listed in this appendix were contacted for the survey conducted in conjunction with development of this Resource Guide. Many of them operate workforce development programs of interest.

Action, Inc
24 Elm Street Gloucester, MA 01930
www.actioninc.org
Ronna Resnick
Director of Employment & Training
978-281-7402
ronnar@actioninc.org

Adirondack Community Action Programs, Inc.
7572 Court Street, PO Box 848
Elizabethtown, NY 12932
Margorie Garcia
Development Coordinator
518-873-3207
acapdevelopmentcoord@westelcom.com

Asian American Civic Association
200 Tremont Street
Boston, MA 02116
www.aaca-boston.org
Richard Goldberg
Director of Education
617-426-9492 ext. 223
richard@aaca-boston.org

ASSIST Agency, Inc.
11 North Parkerson Avenue
Crowley, LA 70526
ASSISTAgency.org
Sharon Clement
Executive Director
337-788-7550
sclement@ldol.state.la.us

CAP of Lancaster County
PO Box 599
601 South Queen Street
Lancaster, PA 17608
www.caplanc.org
MacDonald Stacks
Executive Director
717 299-7301
mstacks@caplanc.org

CAP Services, Inc.
5499 Hy 10 East
Stevens Point, WI 54481
www.capserv.org
Mary Patoka
VP & Director, Family Services Dept.
715/343-7512
mpatoka@capmail.org

Community Action Agency of St. Louis County
2709 Woodson Rd.
St. Louis, MO 63114
www.caastlc.org
Georgie Donahueq
Director of Community Resources
314.446.4411
georgie@caastlc.org

Community Action Committee of Pike County, Inc.
941 Market Street
Piketon, Ohio 45661
www.pikecac.org
Rita A. Moore
Director of Employment & Training
740-289-2371
ramoore@pikecac.org

Community Teamwork, Inc.
 Lowell Small Business Assistance Center
169 Merrimack Street
Lowell, MA 01852
www.lowellSBAC.org
Russell Smith
Executive Director
978-441-1806
rsmith@comteam.org

El Paso Community College-Workplace Literacy Programs
P.O. Box 20500
El Paso, Texas 79998-0500
www.epcc.edu
Sara Martinez
Program Manager
915-831-7792
saram@epcc.edu

Essex County College
303 University Avenue
Newark, NJ 07102
www.essex.edu
Elvy M. Vieira
Assistant Dean
973-403-2533
Vieira@Essex.edu

International Institute of Boston
1 Milk Street   Boston, MA 02109
www.IIBoston.org
Moira Lucey
Vice President of Programs
617-695-9990
mlucey@IIBoston.org

Jewish Vocational Service
105 Chauncy Street, 6th Floor
Boston, MA 02111
www.jvs-boston.org
Thomas Ford
Chief Operating Officer
617 451-8147 X3131
tford@jvs-boston.org

Lee County Department of Human Services
83 Pondella Road, Suite 1
North Fort Myers, FL 33903
http://dhs.lee-county.com
Susan Oliver
Family Self Sufficiency Program Manager
239/652-7916
oliversl@leegov.com

Minnesota Valley Action Council
464 Raintree Road
Mankato, MN 56001
www.mnvac.org
Nancy Haag
Community Services Director
507 345-2405
nancyh@mvac.mankato.mn.us

New England College of Finance/Financial Services Academy
One Lincoln Plaza
Boston, MA 02111
www.finance.edu
Linda C. Fera
Director of Operations - Financial Services Academy
617-951-2350 ext. 300
L.FERA@FINANCE.EDU

Schuylkill Community Action
206 North Second Street
Pottsville, PA 17901
www.schuylkillcommunityaction.com
Jennifer Slifka
Director of Client Services
(570) 622-1995
jslifka@schuylkillcommunityaction.com

South Shore Community Action Council, Inc.
265 South Meadow Rd.
Plymouth, Ma, 02360
Ann Gaffuri
Community Partnerships for Children Director
1-508-747-7575, x239
amgaffuri@sscac.org

Southeast Nebraska Community Action Council, Inc.
802 Fourth Street
Humboldt NE 68376
www.senca.org
Angela Antholz
Development Director
(402) 862-2411 ext. 107
akantholz@neb.rr.com

Stark County Community Action Agency
Families In Partnership Program
1326 Market Avenue North
Canton, Ohio 44714-2606
www.starkfip.org
Lee Bishop
Employment & Training Director
330-580-9347

Tacoma Community House
1314 S. "L" Street
Tacoma WA 98405
www.tchonline.org
Deborah L. Reck
Education Director
(253) 383-3951
dreck@tchonline.org

TEAM, Inc.
30 Elizabeth St.
Derby, CT. 06418
www.teaminc.org
Diane L. Stroman
Vice President of Program Operations
203736-5420 ext. 1234
dstroman@teaminc.org

Transition to Work / Project Hope
594 Columbia Rd. Suite 203
Dorchester, MA 02125
www.prohope.org
Mary Coonan
Director of Transition to Work
617 265-4123 ext. 602
mary@transitiontowork.org

WATCH CDC
144 Moody Street, Bld 24
Waltham, MA 02453
www.watchcdc.org
Roma Goodlander
Project Manger
781-891-6689
roma@watchcdc.org

Westbay Community Action Inc.
224 Buttonwoods Avenue
Warwick, RI 02886
www.westbaycap.org
Jessie Ealy
Division Director, Business Services Center
401-732-4666, ext., 120
jessie@westbaycap.org

Women At Work
50 N. Hill Ave., Suite 300
Pasadena, CA 91106
www.womenatwork1.org
Bety Ann Jansson
Executive Director
626-796-6870 x 22
bajansson@womenatwork1.org

Worcester Community Action Council, Inc.
484 Main Street, 2nd. floor
Worcester, MA 01608
www.wcac.net
Priscilla Holmes
Director of Programs
508-754-1176 Ext.169
pholmes@wcac.net

Workforce Development Council of Seattle King County
2003 Western Ave Suite 250
Seattle Wa 98121
www.Seakingwdc.org
Cas Cogswell
Planner
206.448.0474
Ccogswell@Seakingwdc.org

Appendix C ━━━━━━━━━━━━━━━━━━━━━━━━━━━━

Self-Sufficiency Standard Methodology

The Self-Sufficiency Standard presents a standardized and credbile assessment of how much income it takes for working families in given locations to make ends meet. The Standard is calculated on a county-by-county basis and for 70 different family types in each county. To ensure accuracy and comparability among state reports, the Self-Sufficiency Standard uses data that are: 1) collected or calculated using a standardized or equivalent methodology; 2) come from scholarly or credible sources such as the U.S. Census Bureau; 3) are updated at least annually; and 4) are age and/or geographically specific. The result is a bare-bones budget that determines what is neither luxurious nor too low to meet the basic daily costs faced by working families.

Below is a table describing the data sources and assumptions for the 2003 Self-Sufficiency Standard for Massachusetts. Please visit http://www.SixStrategies.org to view similar tables for all 36 Self-Sufficiency Standard reports.

Data Sources		
Data Type	**Source**	**Assumptions**
Child Care	2000 Child Care Market Rate Study, Executive Summary prepared for the Massachusetts Office of Child Care Services, adjusted for inflation using the Consumer Price Index (CPI)	Infants: Full Time, (0-2 years) Preschoolers: Full Time, (3-5 years) School age: Before and After School, (6-12) The 75th percentile of costs were used.
Food	USDA Low-Cost Food Plan, June 2000.	USDA plan used for all counties. Assumed single adult families headed by female.

Data Sources

Health Insurance	Monthly rate comparisons from Blue Cross and Blue Shield of Massachusetts for seven regions in Massachusetts Medical Expenditure Panel Survey, http://www.meps.ahcpr.gov/ MEPSNct/IC/MEPSnetIC.asp Out of Pocket Costs: U.S. Department of Health and Human Services. 1987. *National Expenditure Survey.*	Blue Cross and Blue Shield of Massachusetts rates to create a ratio of geographic variation in the state. MEPS provides a statewide average for both single and family coverage in 1998. Updated with Medical Consumer Price Index. Out of pocket costs are by age, and are updated with the Medical CPI.
Housing	Department of Housing and Urban Development; *Fair Market Rents for the Section 8 Housing Assistance Payments Program - Fiscal Year 2001* (10/01/01). http://www.huduser.org	Fair Market Rents are used for each city and town in Massachusetts.
Taxes	Massachusetts Department of Revenue http://www.massdor.com/pub/pdfs/SIS_use.pdf	Taxes included state sales tax, federal and state income taxes and payroll taxes.
Transportation	**Public:** Massachusetts Bay Transportation Authority. http://www.mbta.com/index.asp **Private:** Automobile Insurers Bureau of Massachusetts http://www.aib.org, March 1, 2003. U.S. Census, "Travel to Work Characteristics for the 50 Largest Metropolitan Areas by Population in the US: 1990 Census." http://www.census.gov	Public transportation costs (combined monthly bus and subway pass) assigned to the City of Boston. Automobile insurance base rates from the Automobile Insurers Bureau of Massachusetts 2003 Private Passanger Automobile Insurance Rates for 27 Regions were used to calculate a ratio of geographic variation in the state.
Miscellaneous	Miscellaneous expenses are 10% of all other costs.	Includes all other essentials: clothing, shoes, paper products, diapers, nonprescription medicines, cleaning products and household items, personal hygiene items and telephone.

Community Action Agencies in Massachusetts by Workforce Areas

Workforce Area	Community Action Program
Berkshire	Berkshire Community Action Council (BCAC), Pittsfield
Boston	Action for Boston Community Development (ABCD), Boston
Bristol	Citizens for Citizens, Inc. (CFC), Fall River
Brockton	Self-Help, Inc., Avon
Cape Cod	Community Action Committee of Cape Cod & Islands (CACCCI), Hyannis
Central Mass.	Worcester Community Action Council, Inc. (WCAC), Worcester
Franklin/Hampshire	Franklin Community Action Corp., Inc. (FCAC), Greenfield
	Hampshire Community Action Commission, Inc. (HCAC), Northampton
Greater Lowell	Community Teamwork, Inc. (CTI), Lowell
Greater New Bedford	People Acting in Community Endeavor, Inc. (PACE), New Bedford
Hampden	Springfield Partners for Community Action, Inc. (SPFCA), Springfield
	Valley Opportunity Council, Inc. (VOC), Holyoke
Lower Merrimack	Community Action, Inc. (CAI), Haverhill
	Greater Lawrence Community Action Council, Inc. (GLCAC), Lawrence
Metro North	Cambridge Economic Opportunity Council, Inc. (CEOC), Cambridge
	Community Action Agency of Somerville, Inc. (CAAS), Somerville
	Community Action Program Inter-City, Inc. (CAPIC), Chelsea
	Tri-City Community Action Program, Inc. (Tri-Cap), Malden
Metro Southwest	South Middlesex Opportunity Council, Inc. (SMOC), Framingham

North Central	Montachusett Opportunity Council, Fitchburg
North Shore	Action, Inc., Gloucester
	Lynn Economic Opportunity, Inc. (LEO), Lynn
	North Shore Community Action Program, Inc. (NSCAP), Peabody
South Coastal	Quincy Community Action Council, Inc. (QCAP), Quincy
	South Shore Community Action Council, Inc. (SSCAC), Plymouth