



Preparing for Scale and Rigorously Evaluating Opportunities

Economic Mobility - Program Scaling and Expansion



Introductions

Facilitator and Coach



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Employment Social Enterprise Leaders



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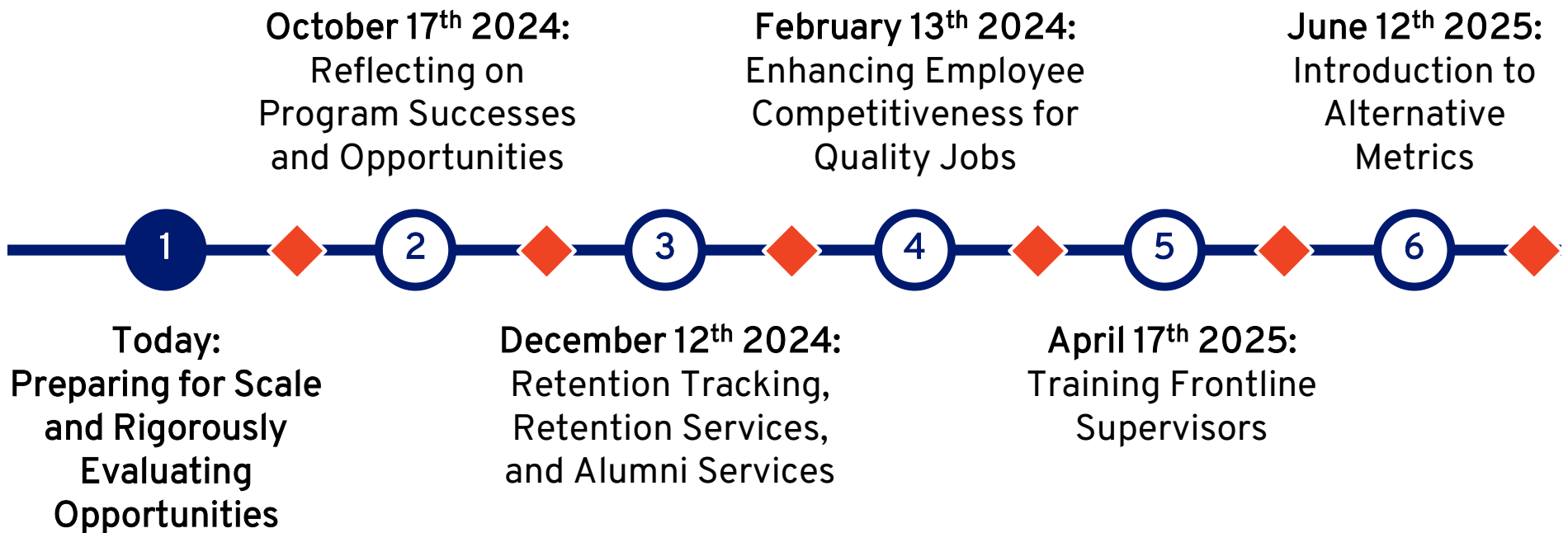


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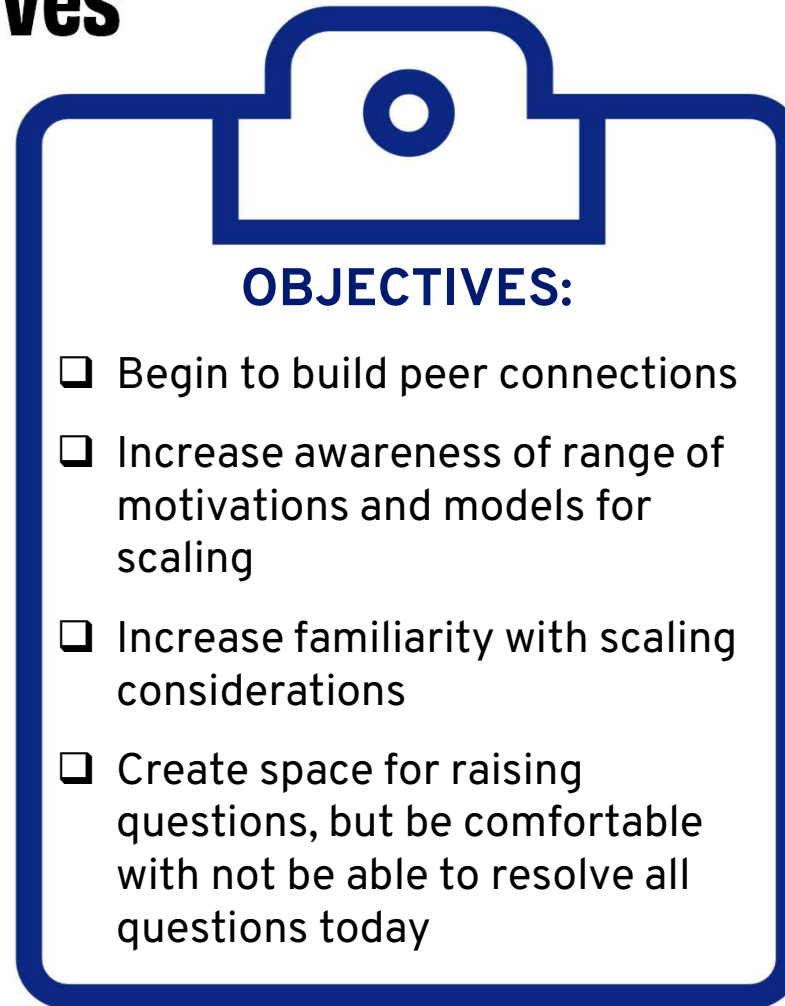
Economic Mobility Program Scaling and Expansion



◆ Optional Coaching Sessions



Session Objectives



How are we Going to Accomplish These Objectives?

1. Introductions of you all!
2. Refine Community Standards
3. Review Scaling Model Framework
4. Engage in three case studies of ESEs scaling
5. Reflect on learnings from today and how that impacts scaling at your ESE
6. Commit to what is next for you based on learnings from this session

Your Program Scaling and Expansion Cohort!



Draft Community Standards

- **Stay engaged:** We'll be spending an intensive, albeit brief period of time together. It's important that folks take care of their individual needs so that they can stay actively engaged in the entirety of the discussion. Please refrain from being on your phone or computer, unless using to take notes. When virtual, please try to limit other activities.
- **Listen to understand:** As opposed to listening to respond, where we wait for someone to stop speaking so that we might speak, listening to understand invites us to actively take in what our peers are saying and ask follow-up questions to ensure we understand not just what a person says, but what they mean.
- **Take space, make space:** If you're someone who is typically comfortable speaking in group settings, consider paying attention to when and how frequently you share, giving space to those voices the group might hear from less frequently. If you're someone who is typically quieter in group settings, consider taking a chance and sharing your questions, thoughts, concerns, and opinions.
- **Nobody knows everything, but together we know a lot:** Everyone has expertise to contribute whether it be skills, resources, stories or insights. Our collective knowledge far exceeds our individual contributions.
- **Challenge assumptions:** We're here to learn from one another and that means asking difficult questions and challenging what we may assume to be best practice. Many of our assumptions are invisible in our culture and ways of working. How might we get curious about the things we assume to be true to explore if there are ways to innovate and evolve our practices?
- **Expect and accept non-closure:** During our limited time together we will not be able to address and solve all open question. That's ok! Prepare yourself in advance that decisions may remain under discussion, questions may remain open and we simply may not have time to address some topics. This is part of an ongoing conversation and there's more to follow.
- **Center Participant Workers:** Participant Workers are the heart of our work. Keep the resident experiences, perspectives, needs and desires front and center in all things
- **Embrace Diversity in All of its Forms:** Acknowledge and value the diversity of perspectives and opinions within the group, specifically how they may be informed by folks lived vs. learned experiences.
- **Create a Safer Space for Sharing / Refrain from Attribution:** We want people to feel comfortable sharing experiences, observations, and ideas - even if those are ideas aren't yet fully baked. Let's help people be vulnerable and feel comfortable sharing by not attributing specifics.





Let's get into it!



Raise your hand if you and your organization :

- **Have previously scaled?**
- **Are in the process of scaling?**
- **Are considering scaling?**



Scaling Process

The scaling process can be divided into three phases with distinct activities:



- Examine **program fidelity** to identify areas of strength and opportunity when scaling
- Make an informed decision on the **model for scaling** to use
- Document decisions across program model, organizational, and external **scaling considerations**
- Execute on logistics required to scale, troubleshoot, and capture data/ experience of scaling
- Use a **feedback loop** to take learnings from scaling to adapt the program model, adapt or make policies across the organization, and inform future decision making

Program Fidelity

Program Fidelity:
the degree to which
your employee
success model
is consistently
implemented in the
way that it was
designed.

Program
Audit

Growth
Implications

Document
Core
Program

Questions to consider:

- Does your program work and achieve what you want?
- What are the strengths and challenges of your program?
- Will you have an opportunity to address challenges by scaling?
- Is your program model relevant to the new form of scaling?

Example: If placement is a challenge, do you need to line up new employers prior to scaling?

Example: If a new business line requires new skills does the program model need to change hours, coaching, and partnerships?

- What are critical elements of your program model that won't work in scaling and need to be adapted?

- What components and data will be critical to scaling?

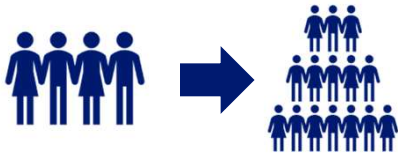
Example: Hiring more coaches is very different from finding new employer partners

- Is your program clearly documented (roles, policies, procedures)?

- Is there something employees can refer to when scaling?

Example: Program Fidelity Model Document (>5 pages) with processes, partnerships, etc.

Models for Scaling



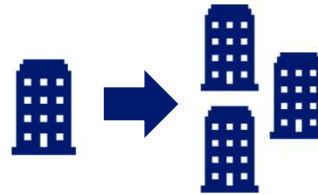
Serving More People

Driver: can be an internal goal, due to business growth, or both

Result: serving more participant workers at your existing location

Examples:

- Going from five cohorts to ten cohorts per year
- Doubling the number of job slots



Replication of Business

Driver: typically, due to business or programmatic opportunity and availability of cash to expand

Result: serving more participant workers at new locations

Example:

- Taking the same model and applying it to in a new city, county, or state



New Business Lines

Driver: can be due experimentation or a business/programmatic opportunity

Result: serving more participant workers in new business lines that requires different job design for participant workers

Examples:

- Expanding from café operations into catering
- Expanding from landscaping into maintenance contracts

Considerations when Scaling

Once you determined program fidelity and the model for scaling there are multiple elements to consider when scaling your program:



Program Model Scaling Questions

Recruitment

How does your recruitment need to change to account for the additional job slots and potential shift in demographics? What impacts are there on recruitment of your focus population?

Program Experience

How does the program look and feel different to existing and new participant workers? What experiences are crucial to carry over to the expanded workforce (e.g., physical feel, traditions)?

Job Design & Expectations

How is the job different (e.g., skills learned, location of work, and hours)? How does this change future employment opportunities, what roles are participant workers now prepared for?

Placement

Are there enough job slots to place participant workers in either permanently or with another employer? Are there expanded roles participant workers can be placed in?

Programmatic Roles

Do the roles of staff supporting program need to shift to support scaling? Is there a need to hire new staff for new or existing roles? What is the mix of new to existing staff?

Outcomes Achievement

How do the tracking of program outcomes need to shift to accommodate scaling? How does information captured on outcomes achievement inform changes to the program model?

Organizational Scaling Questions

Business Lines

Is the model of hiring the same (e.g., transitional vs. permanent)? How do changes in products and/or services offered impact participant workers, customers, and other stakeholders?

Staffing Model & Culture

How does staffing across the ESE need to change to support scale? How does onboarding new staff continue knowledge of program model and culture? How far in advance is needed to hire?

Human Resources

What additional support is needed from human resources to support additional job slots? How will support need to change if there are multiple locations?

Processes

What activities are centralized and decentralized? What processes need to be changed? What processes need to be documented to support delivery of the program in a consistent way?

Technology

Does your technology infrastructure support scale or are investments in more sophisticated technology needed (e.g., case management system)?

Resources

How will the new elements of the business and program be funded? Is the budget of the new program known? Is funding secured and are there differences in allowable expenses?

External Scaling Considerations

Partnerships

Will new partnerships be needed (e.g., recruitment, employers, employer supports, funders)? How will these relationships be formed? Are there staffing and timing implications?

Worker Supports

Are there differences in availability of worker supports (e.g., public transportation, health services, housing services)?

Customer Base

Is the customer base different? How does this impact your participant workers experience and job slot security (e.g., is the scale sustainable)?

Participant Worker Base

Are there differences in the participant worker base needed for filling additional job slots (e.g., new focus populations, different criteria for hiring)?

Labor Market

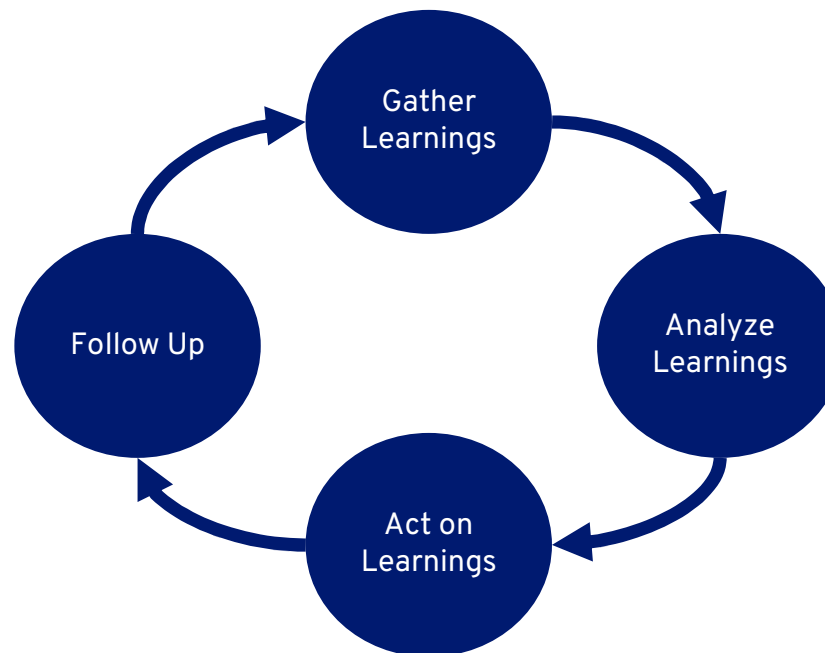
Are there differences in the labor market and skills workers need to be competitive?

Available Funding

Are there differences in the funding landscape (e.g., funding available and diversity of funders)?

Feedback Loop

Through the scaling process and after you've begun scaling there will be many lessons learned. These lessons should be captured and applied across your ESE to continue improving your policies, processes, program, and business.



Case Studies for Today



Focus Population: Justice Impacted
Incorporated as: Standalone Nonprofit Organization

*Larry Craig
Social Enterprise Director
Nashville, Tennessee*



Focus Population: Opportunity Youth
Incorporated as: Standalone Nonprofit Organization

*Dan Rhoton
Executive Director
Camden, New Jersey*



Focus Population: People facing multiple barriers to work
Incorporated as: A program division under Goodwill Central Texas

*Keith Sommer,
Vice President
Austin, Texas*



Case Study Review



BREAKOUTS:

Discuss the Case Studies background materials and answer the following:

- What questions do you have about the ESE's scaling experience? [Discuss and write]
- What topics in the case study are relevant to your ESE's experience or considerations? [Discuss]



Case Study Time:

You have three blank considerations papers on your table please use these to jot down things you learn that are applicable to your ESE during the case studies. We'll debrief learnings after the case studies and you will have additional time to reflect on learnings and what actions you want to take from this session back to your organization.

Case Studies for Today



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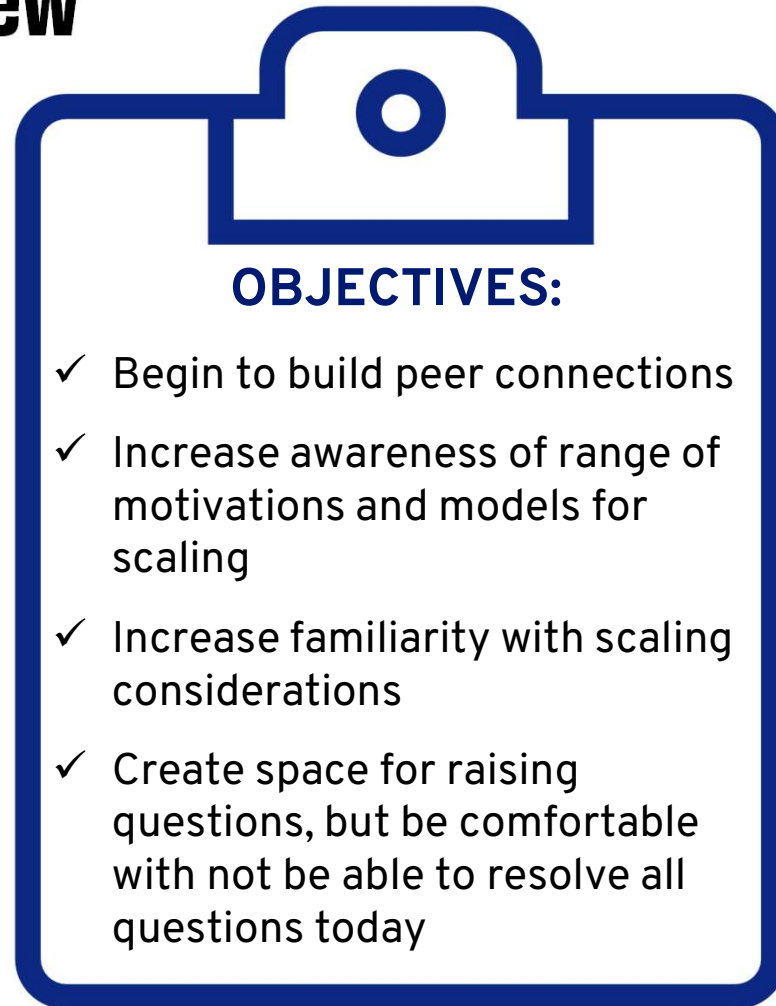
Reflect & Discuss:

Based on what you heard from the ESE leaders...

- What new questions, considerations, or ideas did the case studies spur for you?
- What do you want to take back to your ESE? What colleagues do you want to engage?



Session in Review



SMART Goal & Commitments



Please develop a SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goal for the efforts you are putting into these sessions. For example:

- Use content shared and coaching sessions over the next 11 months to improve our program's ability to track data and launch alumni services

Based on everything you learned today what is 1 to 2 commitments you can make? For example:

- Share growth models with others at my ESE
- Discuss scaling considerations with my leadership team
- Work through a challenge with one of the considerations with coworkers

What's next?

- Additional resources will be posted on REDFWorkshop
- Coaching hours will be hosted on Thursday Sept 19th from 11am-12:30 PST
- Make progress on commitments from last slide!
- Next session will be virtual and is on Thursday October 17th from 11am-12:30pm PST



Feedback Survey

Please take a few minutes to fill out our Survey on this session. We will also be collecting the SMART goal you developed in this survey.

<https://bit.ly/EMTScale>

This feedback helps us improve your experience and plan adjustments to make moving forward.

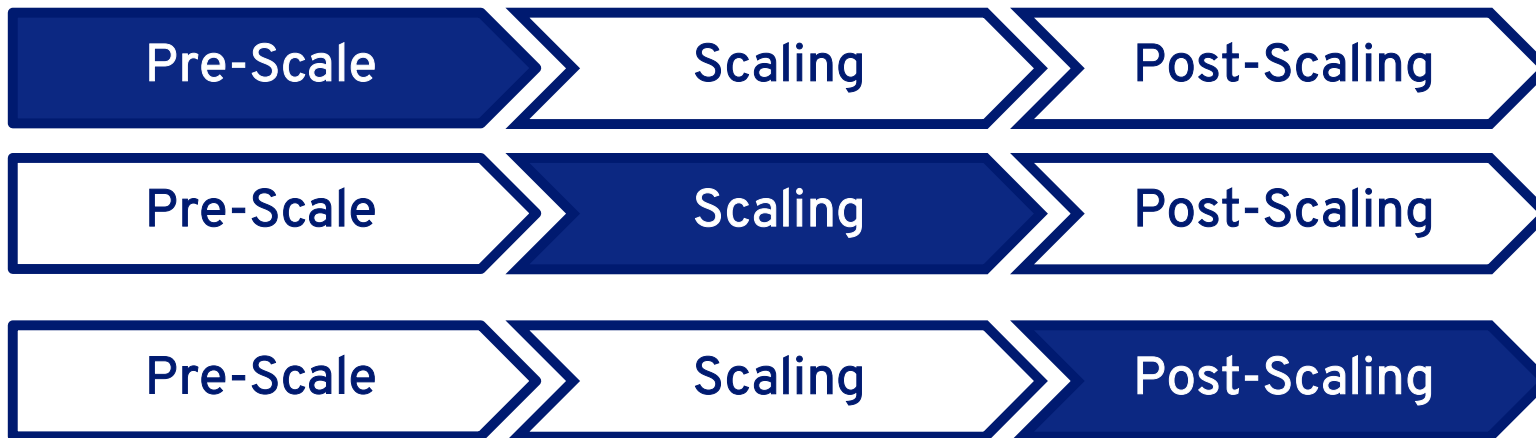


REDF

An investment that works.

Thank you!





Agenda (2 Hours)

- Introduction and Intro Activities – 20 minutes (shorten this to give 10 min break)
- Main Session Content including reflection times as needed – 25 minutes
- Break and Context Reading – 5 min
- Case studies with ESEs – 45 min (15 min each with presentation and Q&A) - (post it note questions and group them and control the timing) – acknowledge short presentation for the speakers. 1 pager on desk when they come in and sit down. Scan this by the time we get to the panel. Similar format of sentences about org, scale model, scaling situation, scaling outcome, and considerations maybe – speaker is sharing the nuance. Send it ahead of time – trickling in give it to them. Send ahead of time with the community standards so not seeing it for the first time. Print outs. Questions or additions. Prep: Growth model, considerations, narrative – first convo learning and listening – tee up 3 and thinking of as a portfolio and in 2nd convo given the mix this is what we would like you to focus on. 1 pager is from 1st convo. 2nd talk about focus areas. 3rd is logistics and reiterating. Let them know from the beginning that this is a short presentation. Location, population, number served, program model general also on the one pager. Hopeworks (success – replication), Project Return (mix – scale + replication), GCT (didn't stick / return fin or impact – biz line & rep). Getting them to focus on the program part not the business. Right person or someone else? Can't have them bring 2 people.
- Individual reflection on case studies – 5 min
- Large group debrief – 10 min
- Closing – 10 min

Other notes:

- Check out Farber projects and other projects with the ESEs we are talking to next week
- Preview next session in the closing as well as pol coaching hours
- Objectives: walk away with 1-2 areas of things to work on, and tool they can bring back (want people to go into scaling in a very intentional way and be thoughtful. We think these boxes should help you focus. Which are the ones that hopefully you have more



Individual Reflection:



- What model of growth is your ESE pursuing?
- What questions do you have about your growth plans and their impact on program?
- What considerations have you already worked through and what is outstanding?



Slide 31

KO0 More structure to the individual and group questions

Katie Orovecz, 2024-07-10T19:15:59.958

KO0 0 Open up opportunity for cohort to connect

Katie Orovecz, 2024-07-10T19:16:19.011

KO0 1 Sheet where keeping track of someone said something in this session to follow up with them about that I would like to talk to the coach about. Structure and track where they can go back. Sessions aren't very long so being able to call back to what folks can talk to each other would be great. Ways to do this and instill this.

Katie Orovecz, 2024-07-10T19:17:26.118

Hopeworks Case Study

Program Model	
Recruitment	Program Experience
Placement	Job Design & Expectations
Programmatic Roles	Outcomes Achievement

Organizational	
Business Lines	Processes
Staffing Model & Culture	Technology
Human Resources	Resources

External	
Partnerships	Worker Supports
Customer Base	Participant Worker Base
Labor Market	Available Funding



GSG Case Study

Program Model	
Recruitment	Program Experience
Placement	Job Design & Expectations
Programmatic Roles	Outcomes Achievement

Organizational	
Business Lines	Processes
Staffing Model & Culture	Technology
Human Resources	Resources

External	
Partnerships	Worker Supports
Customer Base	Participant Worker Base
Labor Market	Available Funding



Project Return Case Study

Program Model	
Recruitment	Program Experience
Placement	Job Design & Expectations
Programmatic Roles	Outcomes Achievement

Organizational	
Business Lines	Processes
Staffing Model & Culture	Technology
Human Resources	Resources

External	
Partnerships	Worker Supports
Customer Base	Participant Worker Base
Labor Market	Available Funding



Leaders in this Session

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rjimenez@sgvcorps.org	Rene Jimenez	San Gabirel Valley Conservation Corps
covonne@plantingjustice.org	Covonne Page	Planting Justice



Program Model Scaling Questions

Recruitment	
Program Experience	
Job Design & Expectations	
Placement	
Programmatic Roles	
Outcomes Achievement	



Organizational Scaling Questions

Business
Lines

Staffing Model
& Culture

Human
Resources

Processes

Technology

Resources



External Scaling Considerations

Partnerships	
Worker Supports	
Customer Base	
Participant Worker Base	
Labor Market	
Available Funding	

