



# Preparing for Scale and Rigorously Evaluating Opportunities - Coaching Session

*Economic Mobility Growth – Program Scaling and Expansion*





**In the chat please fill out the rest of this sentence:**

**Zooming into today's session, I am feeling...**










# 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.

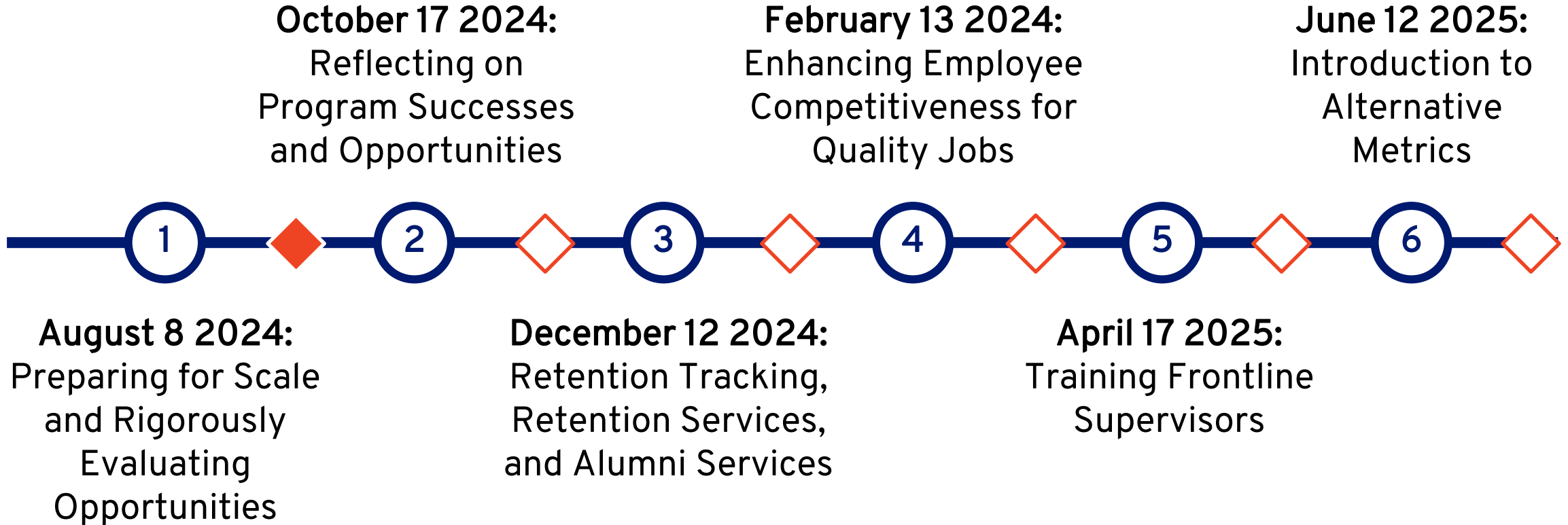


# CA RISE Program Model Overview

<b>Capital</b>	 Grant	<ul style="list-style-type: none"> <li>• 50% of grant disbursed in late June / early July 2024</li> <li>• Remaining 50% of grant disbursed in November 2024</li> </ul>
<b>Community</b>	 In Person Capacity & Network Building	<ul style="list-style-type: none"> <li>• Aug 7th &amp; 8<sup>th</sup>, 2024 in person kickoff in Sacramento (details coming)</li> <li>• Optional Regional Meetings (details coming)</li> </ul>
	 Relationship Manager Advisory Meetings	<ul style="list-style-type: none"> <li>• 1:1 Meetings to help you navigate program opportunities</li> <li>• Offers continued support and connection to resources</li> </ul>
<b>Capacity</b>	 Cohort Track Sessions	<ul style="list-style-type: none"> <li>• Sessions every other month with 10-20 ESEs focused on Sustainable Growth of ESE businesses or Economic Mobility of ESE participants</li> </ul>
	 Responsive TA	<ul style="list-style-type: none"> <li>• Optional in-depth support from external consultants or ESE leaders focused on a specific topic or challenge</li> </ul>
	 Workshops	<ul style="list-style-type: none"> <li>• Optional working sessions focused on ESE specific challenges and opportunities with talent, operations, and government opportunities</li> </ul>
	 Self-Service Tools	<ul style="list-style-type: none"> <li>• Access to resources (e.g., tools and templates) on specific topics through REDFWorkshop and monthly newsletters</li> </ul>



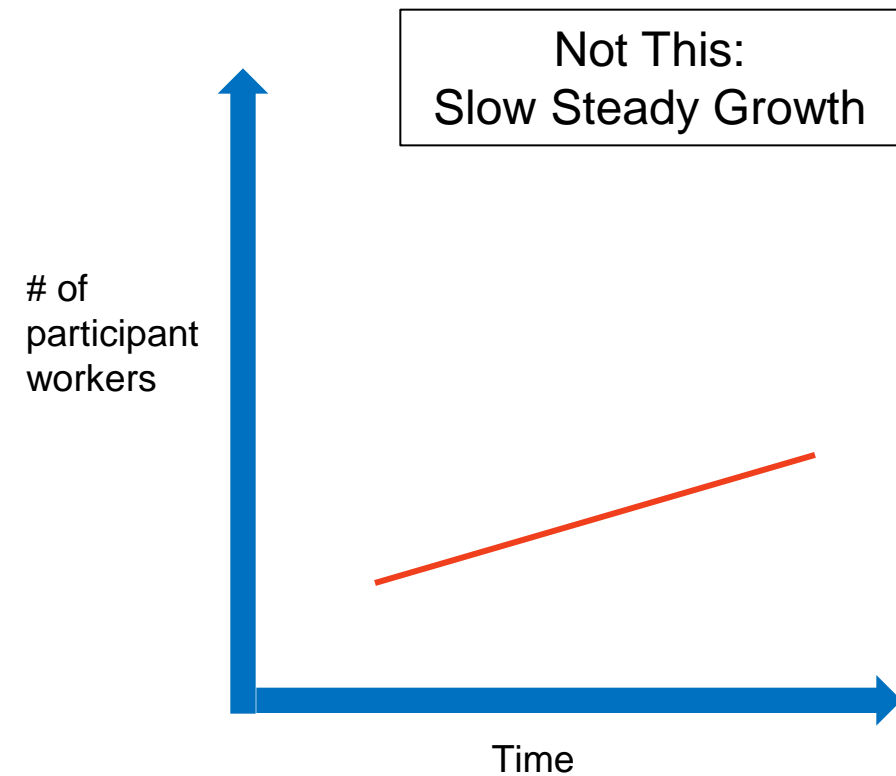
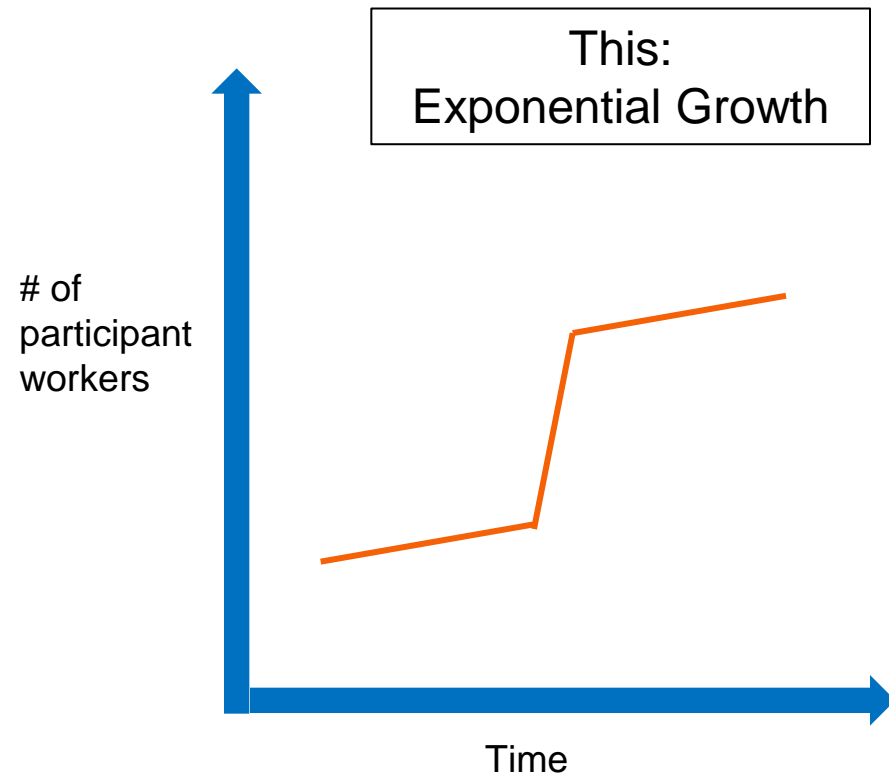
# Economic Mobility Program Scaling and Expansion



◆ Today's Optional Coaching Sessions



# What we mean by "scaling" today



# Scaling Process

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

## Pre-Scale

- Examine **program fidelity** to identify areas of strength and opportunity when scaling
- Make a data-driven decision on the **model for scaling** to use

## Scaling

- Document decisions across program model, organizational, and external **scaling considerations**
- Execute on logistics required to scale

## Post-Scaling

- Use a **feedback loop** to take learnings from scaling to adapt the program model and policies across the organization

# **2 Minute Introductions:**

**1) Name?**

**2) Organization?**

**3) How is scaling relevant to your organization? What stage are you in?**



# Session Recap:

## Pre-scale

- Fidelity and documentation

## Scaling

- Models
- Considerations tool and questions:
  - Program
  - Organizational
  - External

## Post-Scale

- Feedback loop

**Case Studies:** HopeWorks, GSG Talent Solutions, Project Return

## Independent Reflection:

- How are you assuring fidelity to your program model?
- What is/has/or is likely to drive scaling for your employment social enterprise? Internal factors? External factors?
- Greatest challenges (anticipated or experienced)?
  - Category: Program, Organizational, External
- What organizational teams and roles are/will be/were important to your scaling?



# Small Group Discussion: Program Model Scaling

- What aspect of program model scaling is or has been challenging for your ESE?
- Share a lesson learned / insight / experience relevant to program model scaling that may be helpful to others?





# 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?



**A personal gem or takeaway from my small group  
was ...**



# Small Group Discussion: Program Model Scaling

- What external factors are challenging or have challenged your ESE's ability to scale effectively?
- Share a lesson learned / insight about external factors that may be helpful to others who are scaling?



# 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

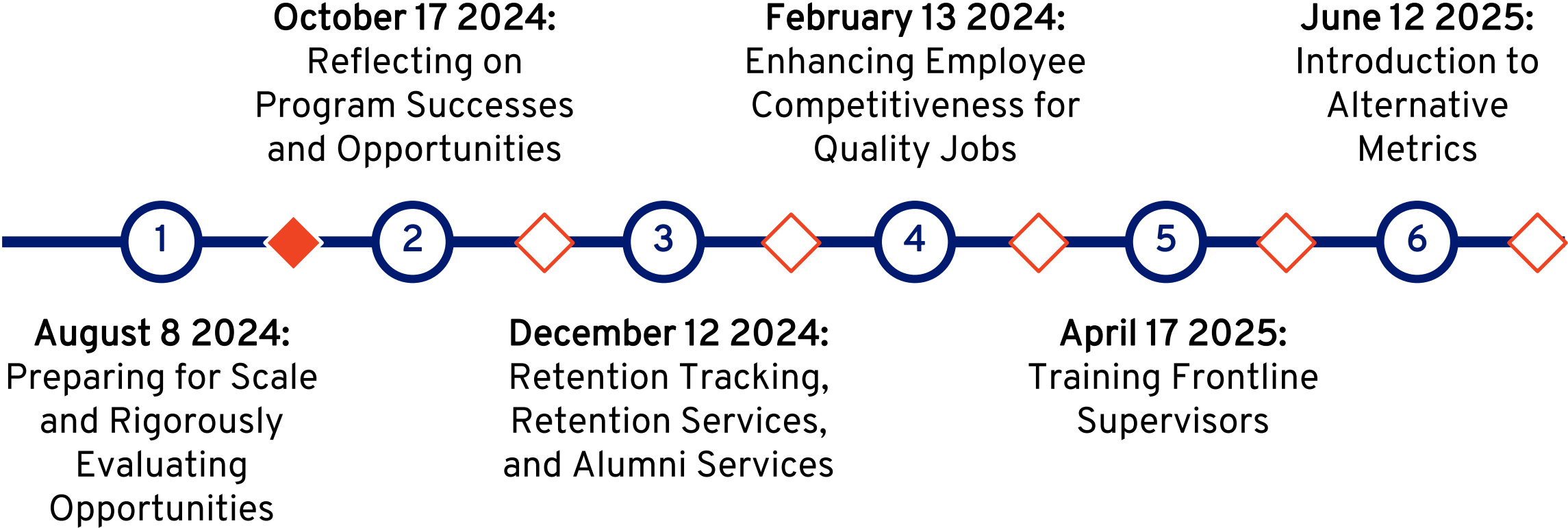
Are there differences in the funding landscape (e.g., funding available and diversity of funders)?

**A personal gem or takeaway from my small group  
was ...**





# Economic Mobility Program Scaling and Expansion



 Today's Optional Coaching Sessions



**In the chat please indicate:**

**1 – 5 your existing comfort level with /  
knowledge about the next topic**

**1 = very uncomfortable / little to no knowledge or familiarity**

**5 = very comfortable / lots of knowledge or familiarity**

**Please complete this sentence:**

**Before the next session I will ...**



**THANK YOU!**

**See you on Zoom on October 17<sup>th</sup>**

