



Building the Infrastructure: Staffing and Partnerships

Economic Mobility – Optimizing Program Design



Please type your name, organization, and how well your current Employee Success Program staffing model works for you (on a scale of 1 to 5)

1 – Does not work well; need to restructure staffing model

5 – Current staffing model works very well

Upcoming Program Requirements & Announcements

Program Requirements:

- 1:1 RM meetings – they are happening now and some of you have already completed them! IF you haven't scheduled yours yet, please reach out to your Relationship Manager Jamie or Will
- Upcoming midpoint survey – this will be similar to the initial survey you all took in September and will be released in March. More to come on this via email

Announcements

- Cause Impacts our Evaluation partner put together some preliminary findings we will send out in the recap email to this track session
- Reminder to talk to your RM about responsive technical assistance for 1:1 support!



Upcoming In-Person Events – Register by Feb 14th!

Tuesday, March 11th NorCal Regional Event in Oakland

Agenda:

- 10:30-11:30am: Coffee and Tour at Red Bay Coffee Headquarters
- 11:30am-12:30pm: Social lunch at Red Bay Coffee w/ REDF staff
- 12:30-2pm: Planting Justice tour
- 2-3:30pm: Solutions Salon
- 3:30-4:30pm: Closing
- 4:30pm: OPTIONAL site visits in San Francisco

https://redf.qualtrics.com/jfe/form/SV_024TVRysTav7Ab4

Thursday, April 10th SoCal Regional Event in Los Angeles

Agenda (still being finalized):

- 10:30-11:30am: Coffee and Tour at South LA Cafe
- 11:30am-12:30pm: Social lunch at South LA Cafe w/ REDF staff
- 12:30-2pm: SUAY Sew Shop tour
- 1:30-3pm: Solutions Salon
- 3-4pm: Closing
- 4pm: OPTIONAL site visits

https://redf.qualtrics.com/jfe/form/SV_0erQeQ2pWxwre50



Big Check Events Debrief

Thank you to everyone that was able to join us for one of the twelve big check events we hosted in December. REDF would like to create space to debrief and discuss next steps you could take to foster a relationship with local decision makers.

Join us February 25 at 10:00am on Zoom. If you have any questions, feel free to reach out to Justin Van Zerger (jvanzerber@redf.org).

https://redf.zoom.us/meeting/register/ovNN_OSCQW2wJII-hhMqRg



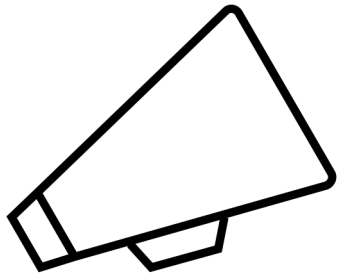
Optional Workshops Coming Your Way!

- Feb 19, Feb 26, March 5 (Three-part series) on Partnership Mapping
<https://redf.zoom.us/meeting/register/463-mffOT2-ZFvm7tJKjfg>
- Apr 1 and Apr 2 Financial Health Metrics 101 and 201 (Financial Fundamentals series) <https://REDF.zoom.us/meeting/register/gcxTeuK5SUGCQ10M5p3lkg>
- Apr 3 Liquidity Understanding & Management Part 1 and Part 2 (Financial Fundamentals series) <https://REDF.zoom.us/meeting/register/5ts1HotVSW-l4VSwNmrTkw>
- May 6 Double Bottom Line Analysis
<https://REDF.zoom.us/meeting/register/3KQmx0WBRMm63oWfoHrpog>
- May 7 Rising Impact Capital Strategy
<https://REDF.zoom.us/meeting/register/l1N4LWq2Rha4SoMhOOgKPA>

All upcoming and completed optional workshops can now be found on REDF Workshop!



Help us collect IT practices and get \$25!



Help REDF understand how technology is working for our national employment social enterprise (ESE) community!

REDF has partnered with Deloitte Consulting to learn about ESEs' technology solutions and how these solutions can better serve ESEs' needs.

Complete this 10-15 minute [survey](#) and receive \$25 for your valuable insights. REDF will share back out the findings from this project later this spring. Questions? Contact Maura Welch at mwelch@redf.org.

https://redf.qualtrics.com/jfe/form/SV_aUYrJRpt6iKBs2i



Introducing The Growth & Mobility Fund

Flexible Financing. Lower Costs. Higher Impact.

REDF Impact Investing Fund (RIIF) is thrilled to introduce the **Growth & Mobility Fund – an initiative offering new, flexible loan opportunities just for CA RISE participants.**

Fill out a quick [interest form](#), and we'll follow up to learn about your needs, answer questions, and support you through the process.

Questions? Reach out to me directly at rannamraju@redf.org – I'd love to connect.



Interest Form:



Introducing The Growth & Mobility Fund

Flexible Capital + Job Quality Focus = Lower Costs, Greater Impact

The Growth & Mobility Fund provides flexible capital to help your business grow, with interest rate discounts that increase as you improve job quality – lowering your costs while maximizing your impact. The fund offers:

Discounts from Day One



Get an **automatic discount** when your loan starts – **no extra steps needed**.

Rate discounts are applied based on an **assessment of your current job quality practices** to recognize the value of the policies you already have in place.

Lower Rates Over Time



Earn **additional discounts** throughout the life of your loan by making **job quality improvements** like enhancing employee feedback programs.

We reassess and apply **additional discounts** as improvements are made.

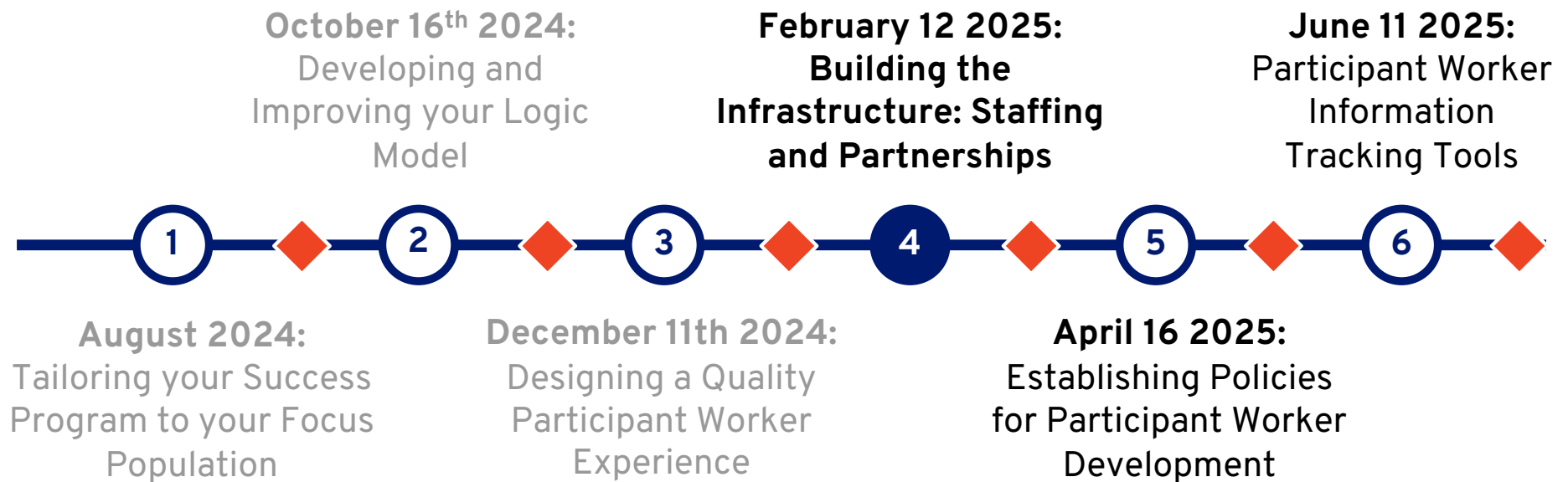
TA For Job Quality



Get **technical assistance** to improve job quality for your participants and employees.

We'll help you identify and fund improvements that are **practical and easy to implement**.

Economic Mobility Optimize Program Design



 **Optional Coaching Sessions**

Our goals for today and plan to achieve them

OBJECTIVES

- Build peer connections
- Gain awareness of various staffing models ESEs use to fulfill their Employee Success Program's priorities
- Hear tips and observations from ESE experience and research
- Be comfortable thinking outside of the box about how to deliver your program through staff and/or partners
- Create space for raising questions, but be comfortable with not being able to resolve all questions today

AGENDA

- Overview: Relevance of organizational structures and employee success functions
- Highlight: Key considerations and ESE examples
 - Organizational capacity
 - Small group discussions
 - Approach to individual support
 - Approach to next step employment
 - Small group discussions
- Wrap Up
 - Individual commitments



Today's punchline

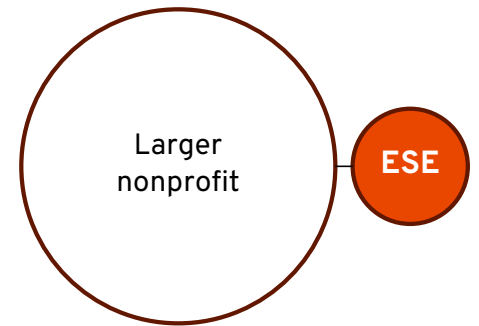
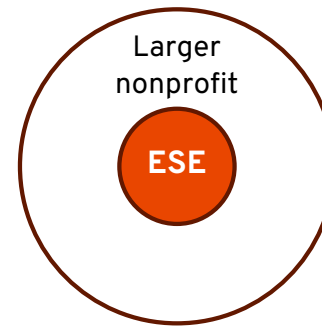
There's no single blueprint for staffing an Employee Success Program.

At any given point in time, it should be shaped by the goals, values, structure, and daily realities of the organization and its participant workers.

An ESE's structure shapes its program staffing



Standalone ESE
(nonprofit or for-profit)



**ESE within or Affiliated with a
Larger Nonprofit**
(may not be under the same legal structure)

➡ Much of this ESE's program staffing is likely internal to the ESE and/or through partners

➡ This ESE may be able to tap into the larger nonprofit's workforce services division staff

Employee Success Program Functions

All the things your program does
to support employee productivity
and success in your ESE and
beyond



Common functions of an Employee Success Program

Recruitment / Enrollment	Goal Setting / Barrier Removal	Development of Job Readiness / Life Skills	Education & Training	ESE Job Training, Supervision, Feedback	Next Step Employment	Employment Retention
<ul style="list-style-type: none"> • Outreach • Intake • Onboarding to program • Assessment 	<ul style="list-style-type: none"> • Addressing basic needs, barrier removal, benefit access • Referrals to and coordination with partner service providers • Goal setting / updating, monitoring progress • Documenting case files / notes 	<ul style="list-style-type: none"> • Instruction on soft skills, job readiness, life, skills • Support for independent study • Reviewing progress 	<ul style="list-style-type: none"> • Instruction or facilitated self-study (e.g., Adult Basic Education, Digital Literacy, job-specific skills, OSHA) 	<ul style="list-style-type: none"> • Transitional job placement / onboarding / shift scheduling • On-the-job training • Performance management • Discipline • Job coaching 	<p><u>For transitional employment models:</u></p> <ul style="list-style-type: none"> • Job search instruction • Proactive job opportunity development <p><u>For permanent employment models:</u></p> <ul style="list-style-type: none"> • Developing permanent job opportunities • Job design / matching 	<ul style="list-style-type: none"> • Post-ESE tracking and services • Employer check-ins / troubleshooting • Incentive management
Program Management						
<ul style="list-style-type: none"> • Partnership development • Curriculum selection / development • Reflection / continuous improvement 			<ul style="list-style-type: none"> • Fund development • Budget development and management • Outcome reporting 			

Key considerations for staffing and partnerships

- 1) **Organizational capacity**
- 2) Approach to individual support
- 3) Approach to next step employment

Organizational capacity to support employee success functions

Example Staffing for Different Organizational Capacity Levels

Low staff capacity

One program staff member supporting all functions; limited offerings

Medium staff capacity

A few program staff and business staff; leveraging other resources

High staff capacity

Team of specialists and multiple partners

Recruitment / Enrollment	Goal Setting / Barrier Removal	Development of Job Readiness / Life Skills	Education & Training	ESE Job Training, Supervision, Feedback	Next Step Employment	Employment Retention
Employee Success Specialist				Business Supervisor	Employee Success Specialist	If requested
	Partners					
Employee Success Specialist			Referral Partners	Business Supervisors	Job Developer	
Business Supervisors	MSW Interns	Onsite Partners			Volunteer Job Coaches	
Intake Specialist	Employee Success Specialist	Life skills Instructor	Industry Instructor	Business Supervisor	Job Developer	Retention Specialist
		Onsite Partners	Partner/ Vendor		Job Coach	

 = Employee Success Program staff

 = Business staff

 = Partners

 = Program staff as requested

 = Partners as requested

Consideration: Be thoughtful about how you combine functions into a staff role

- Some functions can be combined under one staff member, e.g.,
 - Enrollment and case management
 - Case management and retention
 - Next step employment and retention
- Some functions should not be combined under one staff member:
 - Recruiter role should not be responsible for job placement and retention
 - Business supervisor should not also have responsibilities around barrier removal
- Separating out overarching, program management functions from direct service

Recruitment / Enrollment	Goal Setting / Barrier Removal	Development of Job Readiness / Life Skills	Education & Training	ESE Job Training, Supervision, Feedback	Next Step Employment	Employment Retention
<ul style="list-style-type: none"> • Outreach • Intake • Onboarding to program • Assessment 	<ul style="list-style-type: none"> • Addressing basic needs, barrier removal, benefit access • Referrals to and coordination with partner service providers • Goal setting / updating, monitoring progress • Documenting case files / notes 	<ul style="list-style-type: none"> • Instruction on soft skills, job readiness, life, skills • Support for independent study • Reviewing progress 	<ul style="list-style-type: none"> • Instruction or facilitated self-study (e.g., Adult Basic Education, Digital Literacy, job-specific skills, OSHA) 	<ul style="list-style-type: none"> • Transitional job placement / onboarding / shift scheduling • On-the-job training • Performance management • Discipline • Job coaching 	<p><u>For transitional employment models:</u></p> <ul style="list-style-type: none"> • Job search instruction • Proactive job opportunity development <p><u>For permanent employment models:</u></p> <ul style="list-style-type: none"> • Developing permanent job opportunities • Job design / matching 	<ul style="list-style-type: none"> • Post-ESE tracking and services • Employer check-ins / troubleshooting • Incentive management
Program Management						
<ul style="list-style-type: none"> • Partnership development • Curriculum selection / development • Reflection / continuous improvement • Fund development • Budget development and management • Outcome reporting 						

Considerations for organizations with low staff capacity

- **Narrow your target population** so you can focus on more limited barriers and support needs
- **Prioritize resourcing core, value-add, required program components** and associated staff functions
- **Engage with participant workers in group settings** (vs. one-on-one)
- **Use off-the-shelf curricula and tools**
- **Coach staff on how to divide their time**
- **Do more through partners**
 - **But recognize that managing partners and volunteers takes time** and should be detailed in someone's job description and have time set aside for it
- **Consider incentives** for participant workers or alumni as a cost-efficient alternative to staffing
- **Pay more** to hire and retain more experienced or skilled Employee Success staff members

Reduce staff turnover and mitigate against resulting challenges

- **Pay more** to retain experienced Employee Success staff members
- **Consider incentives** to motivate staff performance or ensure retention through important time periods
- **Support professional development**
 - **Opportunities** – Attendance at conferences and trainings, certification in area of interest, NAWDP workforce professional apprenticeship, etc.
 - **Responsibilities** – E.g., Spearheading new initiative (e.g., lived experience advisory board)
- **Institutionalize relationships and practices**
- **Build in time for** and ensure habit of **comprehensive and up-to-date documentation** / case notes
- **Practice trauma-informed management**
 - Acknowledge vicarious trauma and support staff in developing protective practices
 - Ensure leaders are trained in and using coaching techniques

Which functions should I cover with staff vs. through partners?

May be better to deliver with staff

May be better to have a partner deliver

Critical function

How critical is the function to the outcomes you seek to achieve? Is it core to your model?

Non-critical function

Not needed quickly

How quickly do you need to bring the function to your participants?

Needed quickly

Yes

Do you have the right people with the right skill sets and knowledge base?

No

No

Are you a for-profit organization?

Yes

No

Do you know of an organization already doing what you seek to do and doing it very well?

Yes

Yes

Do most of your participants access the function (e.g., because it is mandatory, aligns well with their schedules/locations) or do only a handful of participants use the function?

No

REDF's Partner Evaluation Tool

REDF	Venture Name	Bright Endeavors (for illustration purposes only)					
	High Level Partnership Goals	We would like to partner with a financial literacy nonprofit to support our participants as they are promoted in our enterprise and their earnings increase					
	Partner Map Instructions 1. Update your criteria definitions, as relevant (Column B+C) 2. Weight the importance of the criteria for your enterprise (Column D) 3. Score each potential partner (Column E-K) 4. Evaluate the total scores at the bottom and commit to a decision for each partner (Row 21 + 22)	Weighting and Scoring Weighted Importance 0 = not applicable 1 = not critical 2 = desirable 3 = non-negotiable	Scoring Measures 0 = does not meet criteria 1 = somewhat meets criteria 2 = meets criteria 3 = exceeds criteria				
	Criteria	Criteria Specifics	Importance (0-3)	ORG ABC	ORG DEF	ORG GHI	ORG JKL
Partnership Goals	Geography	Travel time is less than the time to complete the activity	2	3	1	1	0
	Profitability	Budget neutral: covers at least materials, manager time, admin	0	3	3	0	3
	Profitability	Budget additive: unlocks cost savings and/or increased revenue, improves profit margins	2	3	3	3	2
	Reputation	Well known and respected in our community, no known	3	3	2	1	0
	Capability	Demonstrates successful track record in the defined activities, can point to case studies and	3	2	3	3	2
	Capacity	Has successfully worked with organizations of our size, has capacity to continue work with us at least throughout next stage of	2	3	3	2	3
	Communication	Proves they are open to regular communication, values transparency, consistent point of	3	2	2	2	3
	Longevity of the Agreement	Willing to commit to at least 1 year of engagement	2	2	3	1	3
	Mission Alignment	Creates commitment to employment access and	3	3	1	1	2
	Understanding of target population and their barriers to	Comprehends the needs of our participants and seeks to build understanding and empathy	2	3	1	2	1
	Commitment to inclusion	Demonstrates a commitment to diversity, equity, and inclusion	2	2	2	2	1
	Potential Impact of Relationship	Has a wide network that is different from our own and demonstrates willingness to	1	0	1	3	1
	Potential Impact of Relationship	Has a wide network that is different from our own, through which partnership will elevate the brand of our enterprise	1	0	1	1	0
		Max Score Possible:		78			
	Weighted score			56	52	47	42
	Final Decision			Pursue	Release	Decline	Decline



Breakout #1

Break into small groups and discuss:

- 1) How does your capacity affect your current Employee Success Program staffing and partnerships?
- 2) Are you already implementing or intrigued by any of the ideas raised? Please share your experience or interest.

Key considerations for staffing and partnerships

- 1) Organizational capacity
- 2) Approach to individual support
- 3) Approach to next step employment

Approach to individual support: Assigned or shared caseload?


Caseload


Single sustained primary contact


Shared Responsibility

Any Case Manager can help anyone

Recruitment / Enrollment	Goal Setting /Barrier Removal	Development of Job Readiness / Life Skills	Education & Training	ESE Job Training, Supervision, Feedback	Next Step Employment	Employment Retention
Employee Success Specialists with Caseloads				Employee Success Specialists with Caseloads		
				Business Supervisor		
Pool of Employee Success Specialists				Business Supervisor	Job Developer(s)	Pool of ES Specialists

 = Employee Success Program staff

 = Business staff

 = Partners



Approach to individual support: Generalists or specialists?

	Recruitment / Enrollment	Goal Setting /Barrier Removal	Development of Job Readiness / Life Skills	Education & Training	ESE Job Training, Supervision, Feedback	Next Step Employment	Employment Retention
Single sustained primary contact	Employee Success Specialists with Caseloads				Employee Success Specialists with Caseloads		
					Business Supervisor		
Specialized functions with hand-offs	Intake Specialist	Case Manager	Job Coach	Instructor	Job Coach	Job Developer	Alumni Coordinator
					Business Supervisor		

■ = Employee Success Program staff
■ = Business staff
■ = Partners



Key considerations for staffing and partnerships

- 1) Organizational capacity
- 2) Approach to individual support
- 3) Approach to next step employment**

Approach to next step employment

Transitional Employers: Job Development

Internal-Facing

- Focus: Building participant workers' job search skills and confidence
- This role usually provides one-on-one or group instruction in job search skills and supports individuals with their job search
- The staff member should be skilled in coaching and instruction and have personal experience securing employment outside of the ESE

External-Facing

- Focus: Building employer relationships to secure employment opportunities for transitional employees
- This role networks with outside employers to identify good fit jobs for participants, line up interviews, and fulfill job orders
- The staff member should be skilled in sales and relationship-building / maintenance
- ESEs that have this role often *also* have an internal-facing role

Permanent Employers: Promotion

Advancement Internally

- Focus: Finding the right job fit internal to the organization, as well as the right timing
- Supervisors and/or HR typically play this role

Internal advancement: Permanent employment example

Recruitment / Enrollment	Goal Setting /Barrier Removal	Development of Job Readiness / Life Skills	Education & Training	ESE Job Training, Supervision, Feedback	Next Step Employment	Retention of Permanent Employment
Supervisor	External Case Managers	Referring Organizations	Community College	Supervisor	Supervisor	Employee Assistance Coach
HR			Tuition Assistance Program	HR	HR	HR
						Vendor: EAP



External Advancement: Transitional Employment Models

Example Staffing for Different Organizational Capacity Levels

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Employee Success Specialist				Business Supervisor	Employee Success Specialist	If requested
	Partners			Typically internal-facing		
Employee Success Specialist			Referral Partners	Business Supervisors	Job Developer	
Business Supervisors	MSW Interns	Onsite Partners			Volunteer Job Coaches	
				Typically external-facing		
Intake Specialist	Employee Success Specialist	Life skills Instructor	Industry Instructor	Business Supervisor	Job Developer	Retention Specialist
		Onsite Partners	Partner/ Vendor	Typically internal-facing	Job Coach	

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□ = Program staff as requested

□ = Partners as requested

Transitional Employment: Example leveraging peers and partners to support next step employment

Recruitment / Enrollment	Goal Setting /Barrier Removal	Development of Job Readiness / Life Skills	Education & Training	ESE Job Training, Supervision, Feedback	Next Step Employment	Employment Retention
Employee Success Specialists			Trainer(s) (vendor)	Peer Mentor	Employee Success Specialists	
				Supervisor	Staffing Firm	



Transitional employment: Staffing firm example

Recruitment / Enrollment	Goal Setting /Barrier Removal	Development of Job Readiness / Life Skills	Education & Training	ESE Job Training, Supervision, Feedback	Next Step Employment	Retention of Permanent Employment
Account Manager	Employee Success Specialist	Partners	Partners	Placement Site Supervisor	Account Manager	Account Manager



Incentives as an alternative or complement to staffing

Workers

- Research studies show that sizable hiring and retention incentives can be a way to motivate employment among hard-to-serve populations
 - **Canada's Self-Sufficiency Project:** Wage supplement on top of earnings to those working 30+ hours/week and staying off cash assistance
 - **UK's Employment Retention and Advancement:** Financial bonuses to those working full-time; helped with tuition and paid bonuses to those completing training while working

Staff Members

- Some ESEs structure staff compensation to award bonuses or commissions to staff who succeed at getting participant workers into and retained at next step employment
 - Similar to compensating a sales team

Breakout #2

Break into small groups and discuss:

- 1) How are you currently staffing your workers' transition to and success in next step employment? Who is responsible for what? When?
- 2) What new or different ideas has this presentation sparked for you that you wish to explore further?

Reflection

Share in the chat staffing ideas that you are intrigued by or that you would like to explore further during the coaching session.



Key resources to be posted

- Employee success program staffing & partnerships [tool](#)
 - Tool to help ESEs map out your current program staffing/partnership configuration and visualize how you'd like it to change as you grow
 - Can discuss in the upcoming coaching session
- Partner evaluation [tool](#)
- REDFWorkshop [article](#) on partners
- Sample job postings
- Today's slides

Commitments



Based on everything you learned today, what are one or two commitments you can make? For example:

- Discuss with team the pros and cons of different approaches to individual support in our ESE's context
- For employee success staff wearing multiple hats, assign time allocations to various functions
- Initiate outreach to potential partners to fulfill a non-core function

What's next?

- Additional resources will be posted on REDFWorkshop
- Coaching hours will be hosted on Wed Mar 19 from 11am-12:30 PST
- Make progress on commitments from last slide!
- **Next required session will be on Wed Apr 16 from 11am-12:30pm PST**

Questions? Contact your Relationship Manager!

- Will Portnof - wportnof@redf.org
- Jamie Stark - jstark@redf.org



Feedback survey

Please take a few minutes to fill out our Survey on this session.

<https://bit.ly/EMTOptimizeAll>

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





Thank you!