# Staffing and Partnerships – Coaching Session

*Economic Mobility – Optimizing Program Design*

# Consider...

- What is working best for you about your Employee Success Program staffing model?

- What are your biggest challenges or pain points with your staffing model?

# Group Workshop

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# Small group discussion

- Share one staffing model success and / or challenge with your group.

# Large group discussion

- Any successes or challenges that you had in common?

- Was there anything that you were surprised by?

# Session Review

# 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.

# 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 |
|---|---|---|---|---|---|---|
| • Outreach<br>• Intake<br>• Onboarding to program<br>• Assessment | • Addressing basic needs, barrier removal, benefit access<br>• Referrals to and coordination with partner service providers<br>• Goal setting / updating, monitoring progress<br>• Documenting case files / notes | • Instruction on soft skills, job readiness, life, skills<br>• Support for independent study<br>• Reviewing progress | • Instruction or facilitated self-study (e.g., Adult Basic Education, Digital Literacy, job-specific skills, OSHA) | • Transitional job placement / onboarding / shift scheduling<br>• On-the-job training<br>• Performance management<br>• Discipline<br>• Job coaching | <u>For transitional employment models:</u><br>• Job search instruction<br>• Proactive job opportunity development<br><u>For permanent employment models:</u><br>• Developing permanent job opportunities<br>• Job design / matching | • Post-ESE tracking and services<br>• Employer check-ins / troubleshooting<br>• Incentive management |

## Program Management

• Partnership development

• Curriculum selection / development

• Reflection / continuous improvement

• 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

**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*

| Example Staffing for Different Organizational Capacity Levels | | | | | | |
|---|---|---|---|---|---|---|
| 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 | Employee Success Specialist | Employee Success Specialist | | Business Supervisor | Employee Success Specialist | If requested |
| | Partners | | | | | |
| Employee Success Specialist | Employee Success Specialist | Employee Success Specialist | Referral Partners | Business Supervisors | Job Developer | 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

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# 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 |
|---|---|---|---|---|---|---|
| • Outreach<br>• Intake<br>• Onboarding to program<br>• Assessment | • Addressing basic needs, barrier removal, benefit access<br>• Referrals to and coordination with partner service providers<br>• Goal setting / updating, monitoring progress<br>• Documenting case files / notes | • Instruction on soft skills, job readiness, life, skills<br>• Support for independent study<br>• Reviewing progress | • Instruction or facilitated self-study (e.g., Adult Basic Education, Digital Literacy, job-specific skills, OSHA) | • Transitional job placement / onboarding / shift scheduling<br>• On-the-job training<br>• Performance management<br>• Discipline<br>• Job coaching | For transitional employment models:<br>• Job search instruction<br>• Proactive job opportunity development<br><br>For permanent employment models:<br>• Developing permanent job opportunities<br>• Job design / matching | • Post-ESE tracking and services<br>• Employer check-ins / troubleshooting<br>• Incentive management |

| Program Management | | | | | | |
|---|---|---|---|---|---|---|
| • Partnership development | | | | • Fund development | | |
| • Curriculum selection / development | | | | • Budget development and management | | |
| • Reflection / continuous improvement | | | | • Outcome reporting | | |

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# 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 | | | | |
| | Heat 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 growth | 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 | Shares commitment to employment access and economic mobility | 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 |

# Question
# &
# Answer

# Key considerations for staffing and partnerships

1) Organizational capacity

2) **Approach to individual support**

3) Approach to next step employment

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# Approach to individual support: Assigned or shared caseload?

| | Recruitment / Enrollment | Goal Setting /Barrier Removal | Development of Job Readiness / Life Skills | Education & Training | ESE Job Training, Supervision, Feedback | Next Step Employment | Employment Retention |
|---|---|---|---|---|---|---|---|
| **Caseload**<br>*Single sustained primary contact* | *Employee Success Specialists with Caseloads* | | | | *Employee Success Specialists with Caseloads* | | |
| | | | | | *Business Supervisor* | | |
| **Shared Responsibilty**<br>*Any Case Manager can help anyone* | *Pool of Employee Success Specialists* | | | | *Business Supervisor* | *Job Developer(s)* | *Pool of ES Specialists* |

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

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# 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 | | Permanent Employers: Promotion |
|---|---|---|
| **Internal-Facing** | **External-Facing** | **Advancement Internally** |
| • <u>Focus</u>: Building participant workers' job search skills and confidence | • <u>Focus</u>: Building employer relationships to secure employment opportunities for transitional employees | • <u>Focus</u>: Finding the right job fit internal to the organization, as well as the right timing |
| • This role usually provides one-on-one or group instruction in job search skills and supports individuals with their job search | • This role networks with outside employers to identify good fit jobs for participants, line up interviews, and fulfill job orders | • Supervisors and/or HR typically play this role |
| • The staff member should be skilled in coaching and instruction and have personal experience securing employment outside of the ESE | • The staff member should be skilled in sales and relationship-building / maintenance | |
| | • ESEs that have this role often *also* have an internal-facing 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* |

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

# External Advancement: Transitional employment models

## Example Staffing for Different Organizational Capacity Levels

| | Recruitment / Enrollment | Goal Setting / Barrier Removal | Development of Job Readiness / Life Skills | Education & Training | ESE Job Training, Supervision, Feedback | Next Step Employment | Employment Retention |
|---|---|---|---|---|---|---|---|
| **Low staff capacity** *One program staff member supporting all functions; limited offerings* | Employee Success Specialist | Employee Success Specialist | Employee Success Specialist | | Business Supervisor | Employee Success Specialist | If requested |
| | | Partners | | | | | |
| **Medium staff capacity** *A few program staff and business staff; leveraging other resources* | Employee Success Specialist | Employee Success Specialist | Employee Success Specialist | Referral Partners | Business Supervisors | Job Developer | |
| | Business Supervisors | MSW Interns | Onsite Partners | | | Volunteer Job Coaches | |
| **High staff capacity** *Team of specialists and multiple partners* | Intake Specialist | Employee Success Specialist | Life skills Instructor | Industry Instructor | Business Supervisor | Job Developer | Retention Specialist |
| | | | Onsite Partners | Partner/ Vendor | | Job Coach | |

*Typically internal-facing*

*Typically external-facing*

*Typically internal-facing*

Legend:
- = Employee Success Program staff
- = Business staff
- = Partners
- = Program staff as requested
- = Partners as requested

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# 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* | |

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

# Question
# &
# Answer

# Live Example Walkthrough

# Visualizing your staffing model: Live example

| 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* | *Case Manager* | *Job Coach* | *Retention Specialist* | *Business Supervisor* | *Peer Mentor* | *Tuition Assistance Program* |
| *Intake Specialist* | *Instructor* | *Job Developer* | *Alumni Coordinator* | *HR* | *Partner* | *Placement Site Supervisor* |

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■ = Employee Success Program staff   ■ = Business staff   ■ = Peer mentors   ■ = Partners   ■ = Employee benefits   ■ = Business customer

# Visualizing your staffing model: Live example

| 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* | *Case Manager* | *Job Coach* | *Retention Specialist* | *Business Supervisor* | *Peer Mentor* | *Tuition Assistance Program* |
| *Intake Specialist* | *Instructor* | *Job Developer* | *Alumni Coordinator* | *HR* | *Partner* | *Placement Site Supervisor* |

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■ = Employee Success Program staff  ■ = Business staff  ■ = Peer mentors  ■ = Partners  ■ = Employee benefits  ■ = Business customer

# Visualizing your staffing model: Live example

| 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 | Case Manager | Job Coach | Retention Specialist | Business Supervisor | Peer Mentor | Tuition Assistance Program |
|---|---|---|---|---|---|---|
| Intake Specialist | Instructor | Job Developer | Alumni Coordinator | HR | Partner | Placement Site Supervisor |

■ = Employee Success Program staff   ■ = Business staff   ■ = Peer mentors   ■ = Partners   ■ = Employee benefits   ■ = Business customer

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# Questions raised in the last session

## Partnerships:

- How do we navigate the tension between wanting to assure quality and be selective of partners versus wanting to respond positively to all who offer to partner?

- How much time does it take to manage partnerships?

# Questions raised in the last session

<u>Next step employment:</u>

# Approach to next step employment: Which is closest to what your ESE is doing?

| Transitional Employers: Job Development | | Permanent Employers: Promotion |
|---|---|---|
| **Internal-Facing** | **External-Facing** | **Advancement Internally** |
| • <u>Focus</u>: Building participant workers' job search skills and confidence<br><br>• This role usually provides one-on-one or group instruction in job search skills and supports individuals with their job search<br><br>• The staff member should be skilled in coaching and instruction and have personal experience securing employment outside of the ESE | • <u>Focus</u>: Building employer relationships to secure employment opportunities for transitional employees<br><br>• This role networks with outside employers to identify good fit jobs for participants, line up interviews, and fulfill job orders<br><br>• The staff member should be skilled in sales and relationship-building / maintenance<br><br>• ESEs that have this role often *also* have an internal-facing role | • <u>Focus:</u> Finding the right job fit internal to the organization, as well as the right timing<br><br>• Supervisors and/or HR typically play this role |

# Questions raised in the last session

Next step employment:

- Are there ways to leverage our business development staff to support next step employment?

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# Questions raised in the last session

**Funders and Staffing:**

- What is -- and how can we navigate -- the interplay between funder priorities and constraints and our ESE's staffing model?
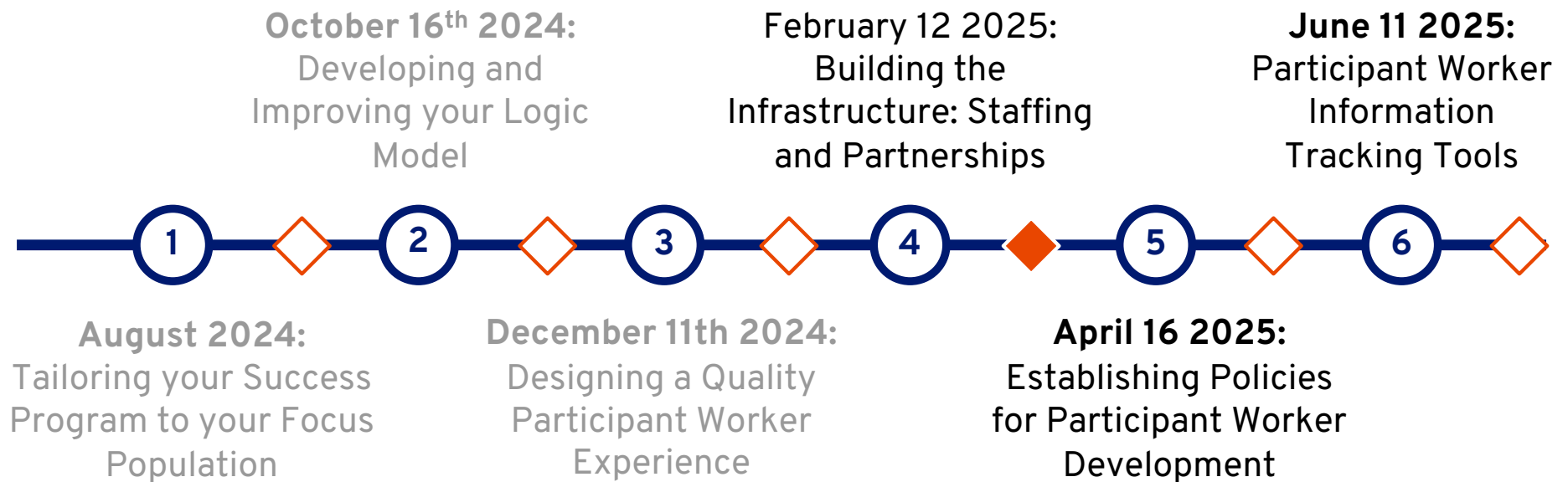
# Key resources on the CA:RISE site



**Session 4**

**Session 4: Virtual**

- **Session Title:** Building the Infrastructure: Staffing and Partnerships
- **Date:** February 12, 2025
- **Facilitators and Coaches:**
  - Terri Feeley (terrifeeley@gmail.com)
- **Resources & Materials Used in Session:**
  - EMT Optimize Session 4 (Session deck)
  - Employee Success Program Staffing and Partnerships Tool (Excel)
  - Partner Evaluation Tool (article on REDFWorkshop)
  - Partner Roles & Responsibilities (article on REDFWorkshop)

# Economic Mobility Optimize Program Design

**October 16th 2024:**
Developing and Improving your Logic Model

**February 12 2025:**
Building the Infrastructure: Staffing and Partnerships

**June 11 2025:**
Participant Worker Information Tracking Tools

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**August 2024:**
Tailoring your Success Program to your Focus Population

**December 11th 2024:**
Designing a Quality Participant Worker Experience

**April 16 2025:**
Establishing Policies for Participant Worker Development

◆ **Today's Session**

# Optional Workshops Coming Your Way!

- **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-I4VSwNmrTkw

- **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/I1N4LWq2Rha4SoMhOOgKPA

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

# 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!