



Coaching Session: Establishing Policies for Participant Employee Success

Economic Mobility – Optimizing Program Design



Other than the Zoom melt down, what is something you recall from attending the Policies for Employee Success workshop? - Topics, takeaways, questions

Program Announcement: Optional Technical Assistance

As a reminder, you can continue to access Technical Assistance through CA RISE. Below are opportunities for additional support beyond the 1:1 project you can access through your RM.

Listen4Good

We are offering Listen4Good's Premium Program in Jul 2025 which includes:

- Survey templates for surveying community members, clients, volunteers, staff, and partners
- 1:1 coaching from experts in survey design, increasing response rates, and data analysis
- SurveyMonkey Premier account
- Client survey benchmarks—comparing your survey results to similar organizations
- Step-by-step webinars and a core web app with templates, resources, and FAQs

If interested, please email Galiana at galiana@redf.org

NorthStar Digital Literacy

We are offering a one-year subscription to NorthStar's Digital Literacy Curriculum, which will enable your participant employees to access tools that support:

- Mastering the basic skills needed to use a computer
- The internet in daily life, employment, and education.

This opportunity also includes three 90-minute training flights designed for someone on your staff who is/will be responsible for digital literacy education.

If interested, please email Galiana at galiana@redf.org

CFR Direct Deposit

We are offering support with direct deposit to your participant employees through CFR focus cards.

Direct deposit is the fastest, safest, and most reliable way to pay employees—and a powerful step toward financial security.

If interested, please email Galiana at galiana@redf.org

Program Announcement: Upcoming Optional Workshops

We will continue to release optional content including workshops that you can attend! We want to gauge interest in the August Sessions as they require a significant time commitment

June & July 2025

June 3- 17: Executive Skills and Career Readiness Series

- **June 3:** Executive Skills
- **June 4:** Lived Experience and Career Readiness
- **June 5:** Career Readiness Curriculum Deep Dive
- **June 17:** The Case for Embedding Executive Skills into your Organization
- **July 1:** Leveraging Implementation Science to become an Executive Skills Focused Organization

July 10: Addressing Burnout – The Science of Optimizing Productivity & Performance

August 2025

Gauging Interest - We can offer the Management Center's Training on Effective Management, which provides tools and resources on how to drive impact, strengthen culture, delegate projects and responsibilities effectively (without micromanaging), address unconscious bias, build strong manager-staff relationships, and use feedback to manage performance and improve results. Minimum time commitment 6 hours.

If interested, please email Katie at korovecz@redf.org

Economic Mobility Optimize Program Design



◆ Optional Coaching Sessions

Our goals for today and plan to achieve them

OBJECTIVES

- Awareness of topics that ESEs have found it helpful to have policies addressing
- Insights from the experience of other ESEs
- More information and ideas to inform
 - Crafting or refining of policies and practices
 - Modalities for communicating to staff and participant employees

AGENDA

- Review of prior session
- Discussion about experience with implementation
- Polling around topics of greatest interest
- Deeper dive and sharing on priority topics
- Wrap Up
 - Individual commitments

Today's punchline

Clear, documented policies empower ESE staff to act quickly, strategically, and with consistency when issues arise, fostering fair and equitable responses.

The “why” - Balancing ESE’s mission with risk mitigation

ESE’s Mission

- Distinguishes ESEs from other employers
- Takes into consideration circumstances of employee
- Developmental approach

Risk Mitigation

- Nonprofits can potentially be sued for discrimination
- Nonprofits are regularly sued for violation of wage and labor laws

Key policies for participant employee success

1) Duration of employment

Sets a time limit capping the length of a transitional job prior to permanent hire or exit for external employment

2a) Eligibility for employee benefits

Outlines benefits for participant employees premised on legal mandates and employment-based classification

2b) Eligibility for program benefits

*Outlines consistent eligibility standards for the supports and resources available to stabilize participant employees and support their development.
May be premised on programmatic standing*

Key policies for participant employee success (cont'd)

3) Compensation

Clarifies whether participant employees are “on-the-clock” earning wages – or otherwise incentivized – for any portion of programming time

4) Re-hiring

Specifies whether the ESE will re-hire a former participant employee and in what situations? Subject to what conditions?

5) Substance use

Specifies how the ESE handles substance use, including testing, treatment, and discipline

Key policies for participant employee success (cont'd)

6) Attendance

Outlines the ESE's expectations pertaining to employee attendance, timeliness, absences and other related matters and the ways it holds employees accountable to these standards

7) Discipline

The ESE's process for enforcing workplace rules and standards of behavior, including the specific staff roles responsible for carrying out each part of that process

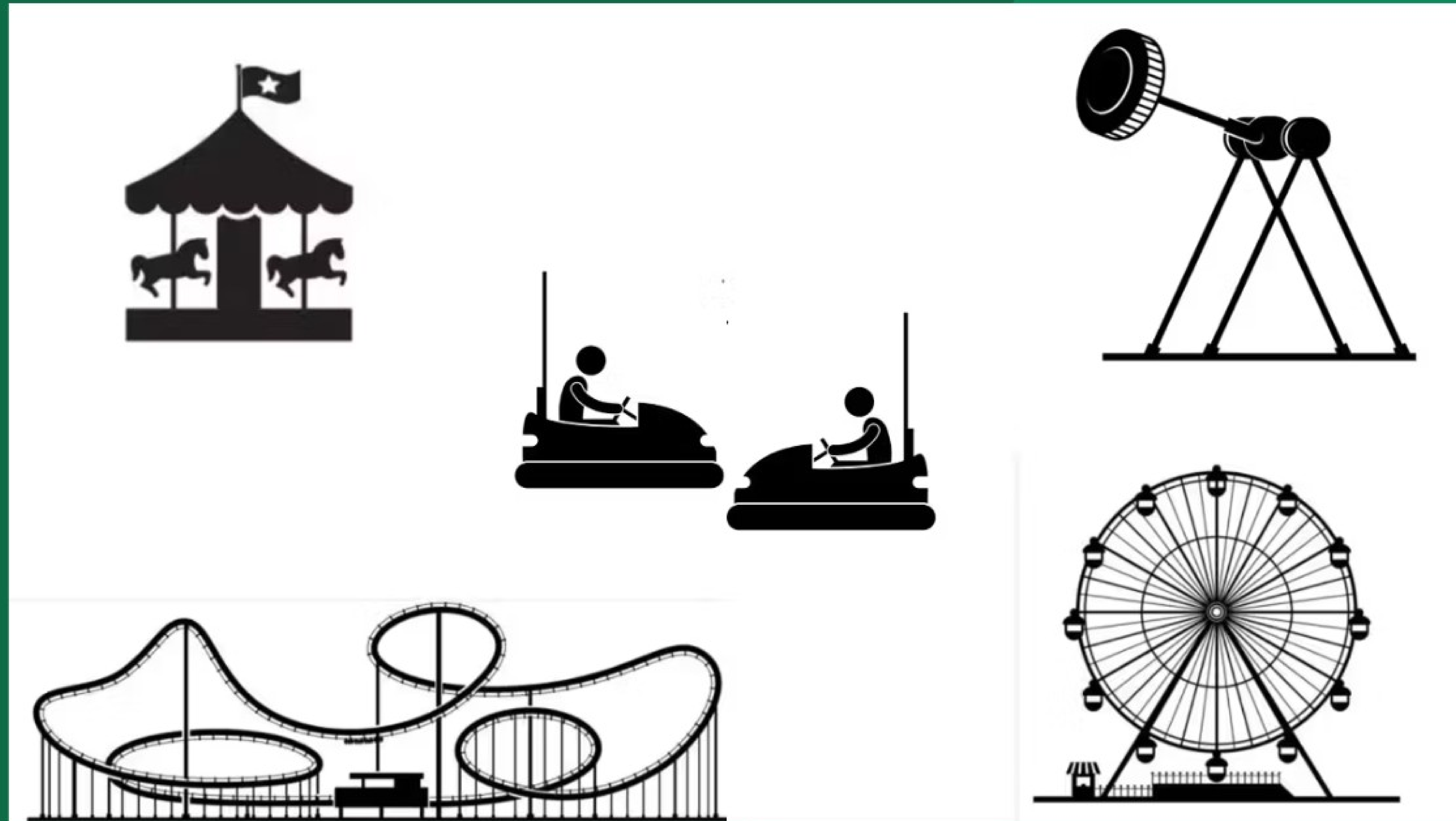
8) Employee input / voice / feedback

Refers to the formal process of gathering and responding to feedback from participant employees, with an emphasis on equity, ease of use for decision-making, review by leadership, and continuous improvement

Communicating policies and practices

- **To professional staff**
 - Policy and procedure manual
 - Case studies support consistent interpretation and application
 - Regular review and updating
- **To participant employees**
 - Frequent and multiple forms of communication
 - Tailoring handbook(s) to participant employees
 - 1:1 check-ins and reviews

Which image best depicts your employment social enterprise's experience with policies supporting participant employee success?



I have confidence that...

We have the right policies in place to support the success of our participant employees.

Our professional staff members are knowledgeable about the policies and implement them in a consistent manner.

Our participant employees are aware of and understand the policies relevant to them.

Strongly disagree

Strongly agree



Which three areas have you had the most experience with—whether positive or negative—and could share insights or tips about?

0

Duration of employment

0

Eligibility for employee benefits

0

Eligibility for program benefits

0

Compensation

0

Re-hire

0

Substance use

0

Attendance

0

Discipline

0

Participant Employee Feedback

0

Communicating policies to staff

0

Communicating policies to
participant employees

Which three areas do you think your ESE could most benefit from ideas, guidance, or support on?

0

Duration of employment

0

Eligibility for employee benefits

0

Eligibility for program benefits

0

Compensation

0

Re-hire

0

Substance use

0

Attendance

0

Discipline

0

Participant Employee Feedback

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Communicating policies to staff

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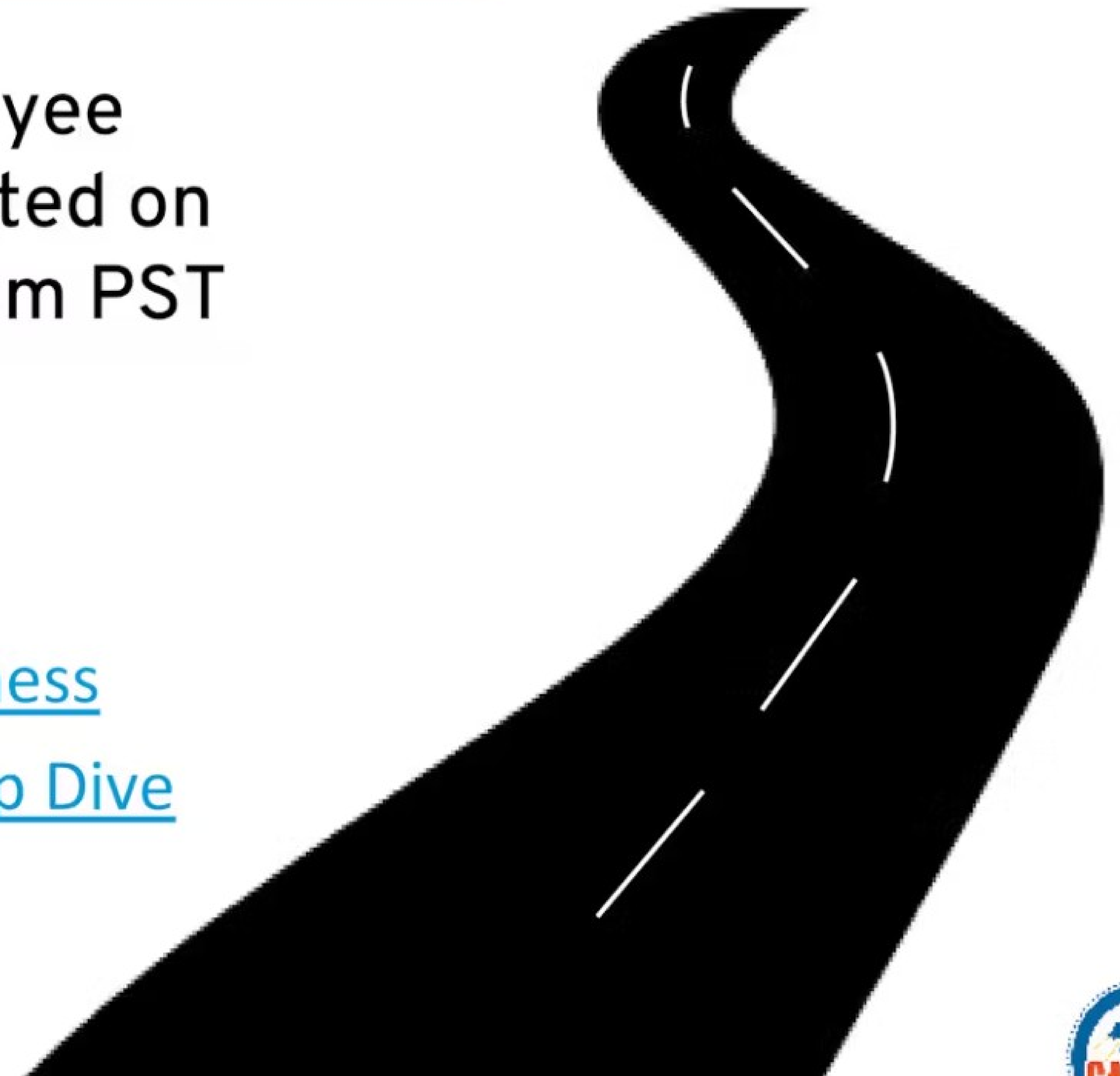
Communicating policies to
participant employees

Posted Resources

- [Participant Employee Compensation Best Practices](#)
- The Mile High Way: Performance Management and Discipline
- PAGA compliance [webinar](#)
- Participant Employee Voice [article](#)
- [Customizable template](#) for a participant employee survey and a sample survey
- REDF Workshop article: [Participant Employee Handbook](#)

What's next?

- **Additional resources** will be posted on [REDFWorkshop](#)
- **Next cohort session** - Participant Employee Information Tracking Tools – will be hosted on Wednesday, June 11th from 11am-12:30pm PST
- **Upcoming optional workshops:**
 - June 3 – [Executive Skills](#)
 - June 4 – [Lived Experience & Career Readiness](#)
 - June 5 – [Career Readiness Curriculum Deep Dive](#)



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!