Career Readiness and Living-Wage Work Initiative:

Synthesis of April Convening

2017

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INTRODUCTION

On April 13th and 14th, over 30 experts in the California workforce and employment ecosystem – including pilot phase grantees of the Irvine Foundation, policy experts, researchers, and staff members of the Foundation – came together to discuss the opportunities, challenges, problems, and solutions facing all of us in our work. Over the course of the two days, we:

- Developed a better **understanding of the workforce and employment landscape** in California

- Painted different **visions** for the future

- Explored **specific topics**, such as how to better engage employers and how to improve the connection between policy and practice, among others, and

- "Flipped the script", asking grantees to step into the Foundation's shoes and act as **portfolio advisors** on the design of the new Career Readiness and Living-Wage Work Initiative

Through many discussions (*and posters, flip charts, and Post-Its!*), it became clear that while there are many opportunities and potential solutions, there is still much more to learn to be able to create a plan that will benefit the workers (and employers) we are all trying to reach.

The purpose of this document is to provide a summary of the insights gleaned as well as share back a detailed recap of our discussions. It includes two sections:

- An **executive summary** of the key insights gleaned
- A **detailed convening synthesis** with the key takeaways from each of the sessions

We will be in touch in the coming weeks and we look forward to our continued engagement and work together.
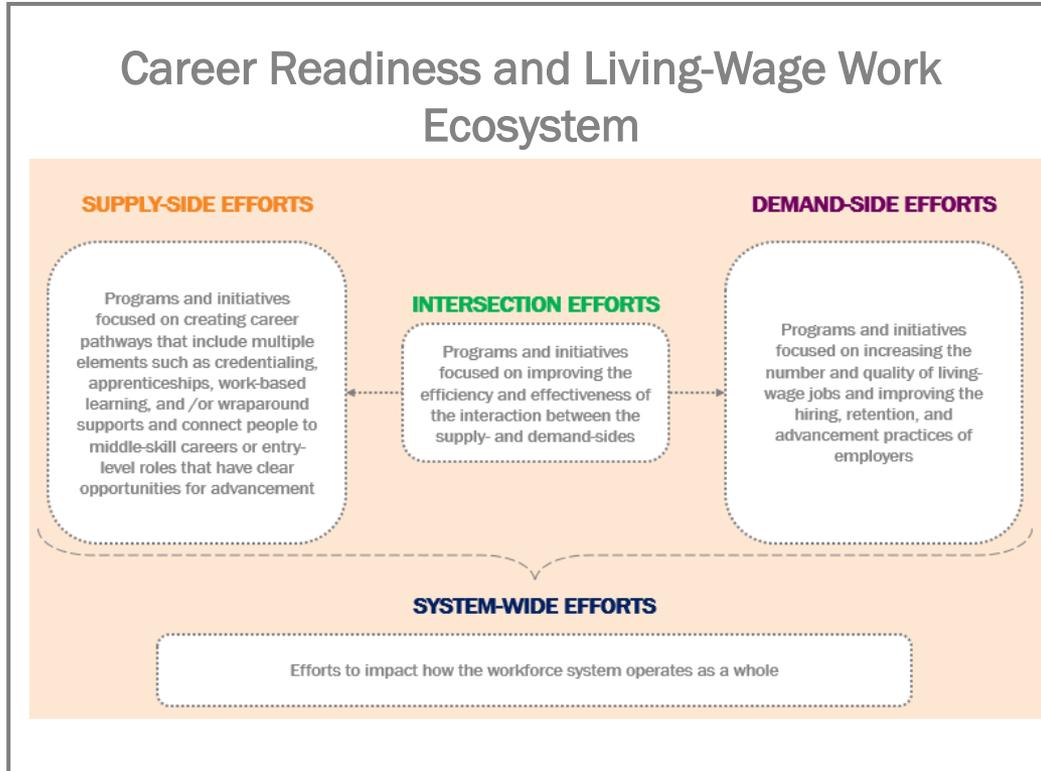
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Executive Summary

UNDERSTANDING THE LANDSCAPE

Participants began by providing inputs on both the key barriers and potential opportunities for **twelve topics** across the Career Readiness and Living-Wage Work Ecosystem

Career Readiness and Living-Wage Work Ecosystem

SUPPLY-SIDE EFFORTS

Programs and initiatives focused on creating career pathways that include multiple elements such as credentialing, apprenticeships, work-based learning, and /or wraparound supports and connect people to middle-skill careers or entry-level roles that have clear opportunities for advancement

INTERSECTION EFFORTS

Programs and initiatives focused on improving the efficiency and effectiveness of the interaction between the supply- and demand-sides

DEMAND-SIDE EFFORTS

Programs and initiatives focused on increasing the number and quality of living-wage jobs and improving the hiring, retention, and advancement practices of employers

SYSTEM-WIDE EFFORTS

Efforts to impact how the workforce system operates as a whole

Twelve Topics

- Employer engagement
- Linking demand and supply at scale
- Industries / sectors
- Sub-populations
- Basic skill development and wraparound supports
- Entrepreneurship as a pathway and quality job creator
- Connecting policy and practice
- Partnering with the public sector
- Improving financial sustainability of efforts
- Defining and measuring impact
- Regional considerations
- Technology for scale

Each of these were important areas in which participants identified opportunities to improve outcomes in the field

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PREDICTING THE 'EXPECTED FUTURE'

Building on their knowledge of the ecosystem, participants brainstormed the 'expected future' should the barriers identified remain...

Sample "Expected Future" Poster
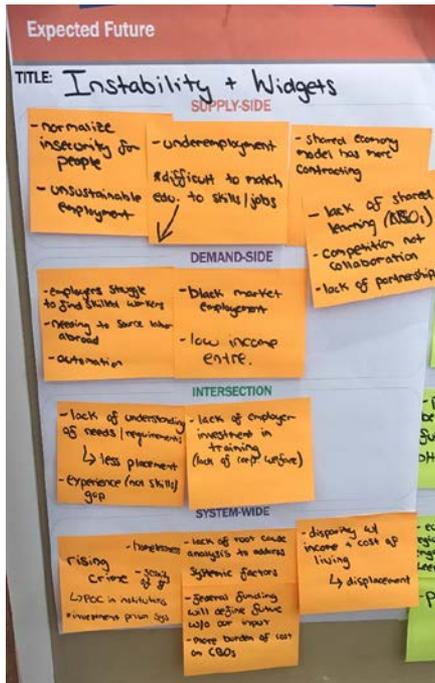
Key Themes of the Expected Future

Continuation along today's trajectory leads to a bleak future:

- **Supply**: Job seekers will face insecurity, increases in unemployment and underemployment, a growing skills gap and lack of standardized credentials in addition to a disconnected labor force with low mobility, low awareness, and lack of access to pathways and jobs

- **Demand**: Employers will struggle to fill their talent pipeline and will seek alternative sources of labor (e.g., automation, outsourced / contracted labor, overseas labor) with the potential of increased discrimination and growth of low-wage jobs

- **Intersection**: The interactions and communications between the supply and demand sides will continue to erode. There will be limited investment by employers in training workers, a continued use of inadequate proxies (e.g., 4-year college degree) for hiring workers, and breakdowns among the public, private, and education sectors in addressing this issue

- **System-wide**: Society will witness increasing crime and incarceration rates, growing wealth disparity, homelessness and displacement, and an erosion of the social safety net. In addition, the state will experience deregulation, continued growth of the gig economy, increased mechanization of jobs, and impatient (and fickle) capital.

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PAINTING A VISION FOR THE 'BETTER FUTURE'

...and painted a better vision for what the future could be

Sample "Better Future" Poster

Key Themes of the Better Future

Targeted engagement and investment leads to...

- **Supply**: Job seekers find accessible and effective pathways and job opportunities, increased economic mobility, lifelong learning, resilient skills in changing markets, viable pathways to higher skills as well as advancement; furthermore workforce development organizations operate with transparency

- **Demand**: Employers recognize the value of investing in training, retention, advancement efforts; base hiring decisions on skills and competencies; exhibit a transparent flow of capital; source talent locally; and understand the ROI of a diverse and inclusive workforce while actively working to change hiring practices

- **Intersection**: There is a renewed social contract between employers and workers with a common understanding of job readiness, increased transparency between supply and demand (e.g., providers, workers, employers, intermediaries), more collaboration of resources, clear communication, and a common framework with a long-term view of learning

- **System-wide**: There is increased societal value of entry-level and infrastructure jobs, reframing of the definition and value of work, long-term and flexible investments from both the public and private sectors, funding diversification, alignment around asset mapping, and an active breakdown of systems of discrimination (e.g., racism, income stratification, school access, etc.)

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Participants next dove deeper into six of the 12 topics to understand the opportunities within each. Topics included how to *engage employers* and how to link *policy and practice*...

Employer Engagement

- Recognizing that employer engagement approaches should be segmented by both company size (e.g., large vs. small business) and type of individual (e.g., CEO, HR, or frontline manager), participants brainstormed the **needs of employers** (beyond merely finding skilled workers):
  - Understanding the **real costs of their talent strategy** and how new talent practices could lead to a better ROI
  - Understanding the **policy and compliance** considerations for their workforce
- There was conversation about the **'readiness' of employers** to engage in hiring, training, and retention of specific populations of workers (e.g., shifting organizational culture, hiring processes, and capacity for wrap-around support). Participants identified **customized workforce programs** designed to adapt to the needs of employers and support such 'readiness.'
- In order to address the challenges of **linking supply and demand**, participants proposed a partnership development approach including fee-for-service programs, employer-led education development, employer-peer learning, and employer engagement in advocating on policy (e.g., hiring ex-offenders), among other practices.

Connecting Policy and Practice

- Participants identified **four broad roles** that practice-focused organizations can play to engage in policy:
  - Making the business case / showing the evidence
  - Telling the "human" side of the data story
  - Supporting coalitions with a common agenda
  - Enabling and supporting new policy voices
- The group identified **three categories of policy work** that Irvine could support:
  - Increasing the size of the "pie" (i.e., the types and amount of money available to workers and the field)
  - Protecting the "pie"
  - Improving the conditions for workers
- Within these categories, there was the most energy around advocating for **expansion of eligibility for PLAs** in the construction industry and exploring similar opportunities in other industries

...how to *define and measure impact* and how to better *link supply and demand*...

Defining and Measuring Impact

- Participants identified an array of metrics for measuring success at the **individual level** (e.g., training, hiring, retention, advancement metrics) and **regional / state level** (e.g., labor force, employer, community, ROI metrics)
- Additional measures were related to outcomes correlated to economic opportunity for job seekers (e.g., commute, housing); employers open to hiring skilled workers from non-traditional channels; and movement to pay-for-performance funding
- The group identified **seven actions to improve data use:**

  (1) Share labor market info
  (2) Collective passive data
  (3) Establish benchmarks
  (4) Aggregate public data

  (5) Work with employers
  (6) Understand real poverty
  (7) Change data policy
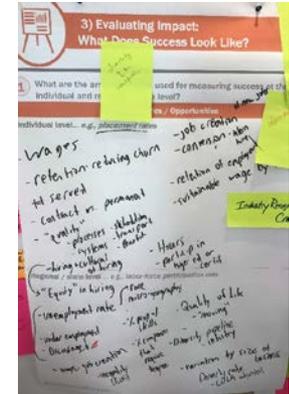
Linking Demand and Supply

- To better link supply and demand, participants highlighted **pivotal roles that intermediaries could play:**
  - Translating, reporting, and packaging
  - Bringing together employers
  - Working with industries
  - Brokering between supply and demand
  - Building networks of supply and demand
  - Setting standards
  - Providing labor market information
  - Aggregating data
  - Providing support tools, processes, etc.
 - Assisting the workforce system

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...and how to support *entrepreneurship* and understand *variations among regions*

Entrepreneurship as a Pathway

- The group identified **both access to capital and technical assistance as critical needs** of entrepreneurs given the challenge in transforming a business from a 'side hustle' to a family-sustaining business

- **Technical assistance opportunities** included:
  - **Diagnosing Needs:** establishing milestones in the lifecycle of becoming an entrepreneur, and underwriting criteria for levels of capital and assistance required at each stage for the small business
  - **Mentoring:** finding ways to scale high-touch, relationship-centered advising via online mentoring platforms, while still appropriately 'diagnosing' the needs of entrepreneurs

Regional Considerations

- Participants identified **eight key factors** for understanding regional variances:

  (1) Demographics
  (2) Educational attainment / skills levels
  (3) Availability and quality of partners
  (4) Regional policies
  (5) Industries
  (6) Quality of infrastructure
  (7) Cost of living
  (8) Local power dynamics

- Participants highlighted that the **most differences exist between the coastal and inland areas**, but also acknowledged several important ways that LA and the Bay Area differ

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ADVISING IRVINE ON ITS OPPORTUNITIES FOR INVESTMENT

As a culmination of the two days, participants developed recommendations for the design of Irvine's Career Readiness and Living-Wage Work initiative – both to target and prioritize resource investments

Sample "Portfolio Advisor" Poster
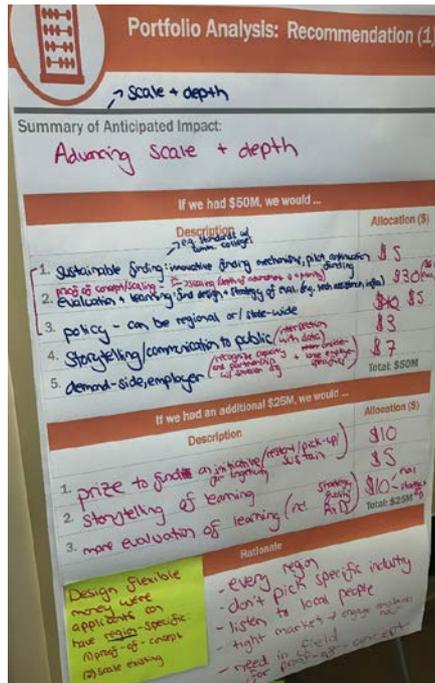
Key Themes

- **Improved data** standards, transparency, and synthesis were highlighted as opportunities for innovation and greater impact across the workforce and employment system

- Participants cited challenges of **financial sustainability** as critical to achieving a better future; therefore highlighting the need for new, innovative strategies to increase (or preserve) diverse funding sources

- **Storytelling** in order to influence discourse, narrative, and decisions was described as an important complement to better data

- Grantees were keen to **engage employers** and also to push them to step up on topics like inclusive hiring, wrap-around services for retention, creating supportive cultures, and better training managers

- There is strong recognition of the value of **policy** as a lever for change, a robust discussion on how best to engage, and an overall desire to preserve sustainable public funding

- All groups agreed on the need for **statewide impact** and some highlighted specific regions as ripe for piloting initiatives and as key leverage points across the state requiring more thoughtful understanding of the **regional landscape**

- The desire to create **coalitions**—for learning, policy advocacy, or data sharing—were emphasized by multiple groups

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Detailed Convening Synthesis

Understanding the Landscape

UNDERSTANDING THE LANDSCAPE ACTIVITY: OVERVIEW

Twelve Topics Across Supply, Demand, Intersection, and System-level efforts

A	**Employer Engagement:** How to work with employers to identify and meet their needs while also serving the workers
B	**Linking Demand and Supply at Scale:** How to connected quality jobs with quality workers in more efficient and effective ways
C	**Industries / Sectors:** Which industries and sectors are promising partners and what are ideal ways to work together
D	**Sub-Populations:** Ways in which organizations work with specific populations—like opportunity youth or formerly incarcerated people—to connect them to jobs
E	**Basic Skills Development and Wraparound Supports:** How to provide support to vulnerable workers beyond job placement or career training
F	**Entrepreneurship as a Pathway and Quality Job Creator:** Where and how entrepreneurship fits as a way to train people to build businesses and provide quality jobs
G	**Connecting Policy and Practice:** How organizations, many of whom provide direct services to the community, consider engaging and influencing policy, advocacy, and community organizing
H	**Partnering with the Public Sector:** How organizations work with the public sector as a funder and a partner
I	**Improving Financial Sustainability of Efforts:** How organizations are exploring ways to improve their financial viability
J	**Defining and Measuring Impact:** How organizations define impact, use data to improve their work and evaluate their impact, as well as exploring how these measures roll up to show progress across the state
K	**Regional Considerations:** How regional variations across the state affect how organizations execute and adapt their work
L	**Technology for Scale:** How organizations are creatively using new technology to scale their work

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A. Employer Engagement

Engaging employers is seen as important across the Career Readiness and Living-Wage Work ecosystem to increase the demand for labor by helping companies grow, create quality jobs, hire workers, and retain and advance them

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., weak signals from employers about their needs	*E.g., community colleges partnering with employers to develop and deliver curriculum)*
• Many CBOs / Non-profit professionals have never worked in private industry • Many nonprofits and foundations misunderstand the priorities / incentives employers face, leading them to propose 'solutions' that don't reflect employer needs • Nonprofits are not sales people, they don't know how to build or establish relationships • Deep and long lasting employer partnerships require investment of time for planning, building mutual trust, and response; this is difficult as people change roles • Employer engagement is often limited to for-profits but even NGOs employ many low income people • There is unrecognized misunderstanding about employer job requirements and how to achieve them – both technical skills including pace of learning on the job to keep advancing and "soft skills" required for success • How much scale justifies partnerships?	• Partner with non-profits or those who understand sales to build relationships • More employers are willing to consider and fund talent from non-profits • Fund investment to build employer partnerships recognizing complexity and time required with capacity building investment • Support employers in developing and operationalizing career pathways that address their talent needs • Build cloud based training offerings with input from employers and to be made available for multiple training providers to leverage • Build strong business case metrics for bringing opportunity youth into the talent pipeline • Look into Manufacturing Council Inland Empire and Intech Center example

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B. Linking Supply and Demand

A critical element of moving the needle with regards to Career Readiness and Living-Wage Work in California is establishing better connections and clear linkages that can be scaled throughout the ecosystem

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., system is highly fragmented	*E.g., create a marketplace platform to improve linkages between supply and demand for labor*
- Training providers vary widely in their interesting / ability to work with employers - Lack of employer collaboration to collectively address talent solutions across job categories - Employer's over reliance on college degrees (4-year) as proxies to job qualification when not necessary for skills required - Lack of employer collaboration to collectively address talent solutions across job categories - Employment outcome information should be collected for all education / training grads (not just workforce / CTE) - Employers themselves often don't invest in workforce training projections and ways of addressing issues - Education advocates / institutions resist being measured by alignment with labor market	- Provide technical assistance to help provider community understand how to be 'dual customer' focused (both opportunity youth and employers are customers) - Host industry-specific hiring events - Develop cloud-based tools to deliver high quality workforce training to opportunity youth at scale and then support with mentor matching for high tech. support - Teach people to obtain employment on their own rather than placing people in jobs - Acknowledge and organize around regional and sector variations - Build capacity for sector based labor market intermediaries - Leverage existing tools (e.g., job search assessments) and redirect toward under served communities

C. Industries and Sectors

There is increasing demand for talent in specific industries anticipating the "silver tsunami" in the coming years (e.g., public utilities) as well as other industries growing at rapid rates (e.g., clean tech)

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., the geographic location of these industries may not match where available labor lives	*E.g., establish industry-specific "training hubs" at community colleges in local regions*
• Lack of awareness and role models for many middle skill jobs – connection has been broken • Employers are not aware that there are available solutions • Training can be too specific (*on hard rather than transferable skills*) and limit opportunities if 'silver tsunami' is misdiagnosed	• Strengthen outreach / awareness job seekers • Bridge programs and apprenticeship exam preparation • Develop local, regional, and statewide marketing outreach campaigns • Publically fund 'shared' industry partnerships • Hospitality interested in career pathway initiative to drive advancement and retention of entry-level workforce • Host hands on career fairs sponsored by business and training providers

D. Sub-Populations

A number of workplace training organizations focus on specific disadvantaged populations (e.g., opportunity youth, formerly incarcerated people, immigrants) to help address these individuals' specific barriers to employment

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., there is limited public funding available for certain sub-populations • With each new sub-population funded, other / prior sub-populations lose money • Likelihood of reduce public funding at federal level for supportive services for populations with barriers to economic mobility • Support for people with disabilities • Limited employment opportunities that lead to high-wages • Racism judgements / geographic prejudice	*E.g., push for policy changes that reduce barriers for specific sub-population* • Gain real expertise of unique needs through specialization • Identify felon-friendly industries like construction and encourage entrepreneurism • Build capacity across the field focused on informed talent pipeline • Disaggregate sub-populations by its many different segments with very different challenges

E. Basic Skills Development & Wraparound Supports

There is growing recognition that basic skills development and wrap-around support is vital for career readiness and post-placement advancement

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., many workers lack baseline readiness and executive functioning skills • Lack of basic skill proficiency (e.g., english, math, technical skills, customer / soft skills) • Political climate and funding for social safety-net • Executive functioning is harder to measure than technical skills • Time and expense of remediation leads to lack of persistence with little research on benefits of remediation • Lack of universal / employee informal definition of employability • Standard of job-readiness to employers	*E.g., create high-touch employee assistance programs for childcare, transportation, etc.* • Work on a 'promotable from day one' mindset and design training • Integrate basic skills into training programs – contextualizing to specific jobs, based on employer input and involvement • Reinforce classroom learning with work-based learning • Utilize comprehensive wrap-around services that address issues employees facts outside of job duties (mental health, child care, transit) • Invite CBOs to assist with wrap-around services (e.g., springboard / finances, legal questions) • Support ongoing engagement of pre-placement supportive services on post placement basis • Guarantee everyone a minimum set of literacy / numeracy skills (e.g., Grads for Life) • Many colleges and university have done magical work over the last few decades in identifying and addressing the unique needs of first generation college students to better support their success; having employers adopt the same attitude for first-generation, career-track workers might be a good investment

F. Entrepreneurship: A Pathway & Job Creator

Entrepreneurship is seen as a "pathway" to self-sufficiency for many Californians, particularly those facing barriers to employment; additionally, small entrepreneurial businesses support local economies and are significant job creators

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., entrepreneurs lack access to capital	*E.g., support the creation / growth of more regional CDFIs*
• Life skill management for first-time entrepreneurs • Access to capital for low-wealth entrepreneurs (loans / equity) • Lack of business management skills necessary for success / sustainability • Incorporating entrepreneurial skills with career or industry skills • The spectrum of capital and support provided are not collaborating enough to learn together; therefore, limited sharing and changing with needs of SMBs • Little to no safety-net for risk taking • The perception is not always accurate about the % of entrepreneurs who 'make it' • Solid employment and experience is required before setting out on starting your own business • Difficult for small businesses to connect to large infrastructure projects	• Develop partnerships between training and technical assistance providers and lenders to ensure connection to capital to support of business growth • Opportunity to consider individual development accounts and KIVA model = crowdsource equity • Source locally for job creation; entrepreneurism can grow out of this • Help start up entrepreneurs team up to create viable business (teaming / partnerships) • Find clusters and link to securities geographically based on true business need / support; provide quick tactical support (TIA) and access to discounted (free) business services and city cooperation • Concept of 'invisible capital' (Chris Rabb) and community wealth building from within (Mihailo Temali, Neighborhood Dev. Center Minneapolis) – good practice and policy ideas • Apply innovative teaching and learning models to needs of this particular SMB segment • Help job seekers explore entrepreneurship along with employment to increase funding sustainability

G. Connecting Policy and Practice

Practice-oriented organizations are increasingly considering the role they can play in the policy sphere, including supporting community organizing, advocacy, and / or specific policy recommendations

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., direct service organizations oftentimes lack capacity and specific policy-related capabilities	*E.g., develop and support coalitions with a common agenda*
• Direct service organizations compete for funding with grassroots advocacy groups • Many organizations are concerned about engaging in policy given restrictions on lobbying as well as ability to engage given limited financial resources • Funders won't pay for policy positions in direct service organizations • Nonprofit boards concerned about losing funders • Scarcity mentality among some organizations in ways of advocating for 'high road' as opposed to advocating for self-interest	• Develop specific strategies to equip and empower champions to join workforce development boards • Incorporate resident power-building strategies into program model • Align advocacy with business coalitions on particular issues • Connect with policy advocacy groups to bring client's challenges, concerns, desires, and successes to inform policy • Increase education of nonprofits on allowable activities • Advocacy is key but funding education is also important in a volatile funding environment (e.g., bring funders on board to policy) • Coalitions to provide cover for individual providers afraid to offend public funders • National organizations can provide "ready-to-use" policy templates for local advocates to adapt and apply in their communities

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H. Partnering with the Public Sector

The public sector, whether at a federal, state, or local level, is a critical funder and partner in training and connecting workers to jobs, but there is significant uncertainty around size and scope of potential budget cuts

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., there is uncertainty about looming federal cuts	*E.g., better leverage the $500M block grant for adult education approved in the 2015-16 Budget Act*
• Onerous reporting / administration requirements • Low expectations, disconnected from urgency of people living in poverty • Challenges being innovative • Public partners are sometimes afraid of doing innovative things if not explicitly permitted for fear of rocking the boat and bringing auditors down on you • Lack of solutions / support once people cross out of low income	• Lift up high performing systems and share best practices • Rapid scale up • Pathway to scale and sustainability • Entrepreneurship training via WIB funding • Link WIB to entrepreneurship programs • Public sector taking lead on identifying opportunities including potential private investors for pay-for-performance / SIB packages • Social bonds and public-private funding investments with measurable impacts

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I. Improving Financial Sustainability of Efforts

Financial sustainability continues to be a challenge, with many looking at diversifying their funding portfolio, reorienting their offerings towards those that employers are willing to buy, or reducing the cost of their program model

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., public funding tends to be inflexible	*E.g., refocusing the organization's offering on only those that employers are willing to pay for*
• Federal funding uncertainty • Challenge to develop diverse portfolios in a rapidly changing environment • Funding sources are inconsistent and unpredictable one year to the next • Limited continuation funding to build off of pilot money • Funders seek new projects and ideas but don't support general opportunities • The cost of funding year to year with changing expectations • Charging employers a 'placement' fee for a qualified employee	• Monetize social impact, seek investment from public / private sector (e.g., social determents of health) • Diversify portfolio with education for all stakeholders around shared investment in outcomes • Create programs with diversified sources of funding to mitigate risks and any one source / category • Pay for evaluation and ROI to help NGOs prove value of their interventions

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J. Defining and Measuring Impact

While there are a range of indicators (e.g., enrollment-to-placement rate, wage growth over time), organizations have expressed that there are unclear standards for measurement and a lack of clear benchmarks for success

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., there is a lack of data sharing and ability to track outcomes for individuals over time • Defining and measuring secondary impacts of activities (direct participants and beneficiaries) • There can be a tendency to resist benchmark for common measures and impact based on geographic and population differences • Confusion between individual, organizational, and 'system' (e.g., statewide) measures • Distinguishing between short, med, and long-term impact • Hard to connect across data sets • Need for easy access to EDD employment data to track candidate placement and wage post-program • Lack of understanding how many, which, and why people continue to achieve economic mobility greater than 1 year post program exit • Lack of capacity / priority of small organizations to adequately track impact • Identifying how to measure counterfactuals of interventions without RCT • Relentless pressure towards 'chunking' and outsourcing means more 1099 independent contractor 'jobs' and shrinking poll of W-2 'good' jobs	*E.g., enhanced data sharing to track workers over time* • Common data sharing platform (anonymous?) • Philanthropic collaboration that fund longer term engagement and success tracking • How might we track impact (economic impact) of moving people from public benefits to middle wage jobs? • Develop structure to help employers measure impact of non-traditional hires • Better utilize administrative data (wage records) to measure employment outcomes rather than labor-intensive individual follow-ups with job seekers / workers • Leverage strong workforce partnerships (California Chancellor Office) • State-wide metrics sharing by WDB; post secondary and economic development agencies

K. Regional Considerations

There are important similarities and differences across the state in terms of educational attainment levels, basic skills levels, availability and quality of partners, regional policies, industries, and existing infrastructure

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., in the Central Valley, the availability and quality of potential partners is limited	*E.g., create training programs to address the needs of new local industries that will require a large number of workers*
• Employment varies in certain regions (i.e., central valley is highly seasonal) • High cost-of-living markets (i.e., Bay Area) means demands for middle-skill jobs keep climbing and strategies to recruit at scale are about bringing talent from outside the community • Skills vary in regions which makes it hard to repeat programs without adjustments	• CA / Central CA Public Works infrastructure employment • "Good job" metrics controlled for local economy (or even by industry) • Doing what matters (S.N. & DSN) • Industry pathways unevenly distributed across California so different opportunities and approaches must be taken

L. Technology for Scale

Technology provides a way to scale programs and services and reach individuals in new ways (e.g., enhanced online learning practices, SMS communication with opportunity youth, etc.)

What are key barriers / risks?	What are potential opportunities / solutions?
E.g., creating new technology platforms can be resource-intensive • Hiring managers don't trust tech solutions and will develop work-around • Competency of organization staff in using tech solutions to support job / skill seekers • Skill-set of participants to readily use tech-related solutions • Access to broadband, internet, technology to use solutions / resources • Low-income people often have phones but don't always have data plans (and sometimes use prepaid numbers that change often) • Over-reliance on technology over relationships and social capital • Cost of constantly upgrading technology can be barrier	*E.g., find ways to leverage existing technology platforms to maintain engagement with workers* • Increase access to resources that are not place-based; both to organizations and participants • Focus on collective impact • Call-to-listen technology (that is, free conference call services used for radio shows) provides a powerful way to reach hard-to-serve populations for quick surveys • Gamification of skill building to increase program participation (mobile?) • Is it possible to build a training program for rural communities that is unconnected to jobs (because they might not exist in those areas); can participates learn the necessary soft and hard skills and put them in practice (question about scaling with technology)

Expected and Better Futures

EXPECTED AND BETTER FUTURES: GROUP 1

	Expected Future *"Yo-Yo Effect: <u>Y</u>our <u>O</u>n <u>Y</u>our <u>O</u>wn "*	Better Future *"Vision"*
Supply	• Diverse, not standardized credentials • Continued de-investment in public schools • Low, basic skills; growing skills gap • Higher expectation of walking in door *'ready to go'* • New demonstrations of credentials	• Accessible and effective opportunities for lifelong learning • Resilient skills allowing flexibility with changing labor market • Higher skilled workforce with more IT related experience • Creation of viable pathway from low-work experience to middle skills
Demand	• Rise in automation – few entry level jobs; willing to look at alternative sources of labor; increasing openness for availability of revenue • Higher emphasis on technical skills, basic skills • Relentless pressure of independent contractor jobs – shifts employer landscape • Expectation of others training staff	• More business recognition that quality jobs and investing in workers builds bottom line – aligned measures • Willingness to consider hiring at scale • New structure in which employers / HR cast a broad net for talent • Employer decisions based in discrete skills and competencies, not just summary credentials
Intersections	• Undocumented workers need new ways to show expertise • Inability to meet the demand of scale as greater demand doesn't ensure greater funding (*doing more with less*) • Regional, housing affordability considerations • Data and credentials – information availability will penalize applications in new ways	• Industry, funders, and training providers communicate • Renewed social contract between employers and workers • Common understanding of job readiness • High capacity labor market intermediaries moving quickly to design training & meet employer demand both immediate and long term • Education progress like revenue model with placing learners with employers (employer-funded)
System	• Uncertainty when labor market shifts • Relentless risk shifting insecurity where job seekers are on their own • Continued on-off / regional approaches • Inpatient, fickle capital • Deregulation	• Increased societal value of entry-level and infrastructure jobs; all work is valued, not just high paying, sexy jobs • Strong public policies "pave the high road, block off the low road" • Public sector makes significant long-term, flexible investments

EXPECTED AND BETTER FUTURES: GROUP 2

	Expected Future *"The Gap Widens"*	Better Future *"Going From Jobs to Careers"*
Supply	• Training programs become specialized while employers need flexible skills • Supply side will not have the transparency to do skilling-up	• Providers, post-secondary, develop talent to be successful in mainstream economy • Supply-side proactively focusing on more than just the first job
Demand	• Employers will struggle to fill their talent pipeline • Smaller companies will disproportionality struggle to find and retain talent • Employer will have limited imagination and understanding about where to find talent	• In needing to support workers beyond Day 1, both providers and employers recognize the importance of supporting workers along pathway – employers see this as their role • Employers look at lifetime value of making investments in talent • Employers see the business case for opening pipeline, retention, and advancement
Intersections	• Continued lack of a common language on supply and demand sides	• More transparency between supply and demand sides • Trade associations are better engaged and utilized for post-placement support • Providers see both workers and employers as who they service • Providers are able to get resources that enable them to move with employers
System	• Lots may be employed, but very few will be benefiting from the distribution of wealth • As folks get pushed out of urban areas, it will impact access to opportunities	• More funding diversification to subsidize downstream supports

EXPECTED AND BETTER FUTURES: GROUP 3

	Expected Future *"Instability & Widgets"*	Better Future *"Transparency and Collaboration"*
Supply	• Normalized insecurity for people • Unsustainable empowerment • Underemployment; difficult to match educate to jobs • Shared economy model with more contracting • Lack of shared learning between NGOs; competition not collaboration with a lack of partnerships	• Policy to support community colleges in embracing flexible / accelerated models tailored to the workforce • Transparency and customer feedback to direct services (important for education, social services, and training)
Demand	• Employers will struggle to find skilled workers • Needing to source labor abroad • Automation • Black market employment • Low income entrepreneurship	• Transparent flow of capital • Local sourcing of jobs • Clear business case and metrics for ROI to employers
Intersections	• Lack of understanding of needs / requirements – less placement • Experience (not skills) gap • Lack of employer investment in training (lack of corporate welfare)	• Partnerships to be proactive about future needs between employers and CBOs • Training matched with internship to link supply & demand • Collaboration of resources • Clear communication and common framework at intersection (long-term view of learning)
System	• Rising crime and increasingly number of people of color in institutions (mass incarceration and increased investment in prison systems) • Scarcity of money and homelessness; disparity with income; increased cost of living and displacement • Lack of root cause analysis to address systemic factors • Federal funding will define future without our input • More burden of cost on CBOs	• Public sharing • Economic development driving regional impact and engagement to keep business in California • Blended funding portfolios highlighting needs to collectively influence funding • Stakeholder alignment and understanding of asset mapping

EXPECTED AND BETTER FUTURES: GROUP 4

	Expected Future	Better Future
Supply	• Continued disconnected employers • Low mobility, discrimination, disconnected labor • Low awareness • Increase of retiring workforce that is disconnected from services • Lack of awareness of opportunity and (access to) pathways	• Thriving and equitable nation • Highly visible, publicly funded pathways to middle career actors • Voice in defining workforce opportunities / systems • Increased economic mobility
Demand	• Transactional relationship with labor • Discrimination (race, gender, ethnicity, age, etc.) • Employers look abroad and globally to meet demand • Growth at low wage jobs • Low wages, discrimination, outsourcing, etc.	• Investing in workforce • Employer training and recruiting • Employers willing to be inclusive • Valuing skills and resources of different populations
Intersections	• Erosion of opportunities for non-college workers • Siloes between education and employment • College continues to be dysfunctional proxy for job success and lack of a college degree persists as an unnecessary barrier • Unequal access to and knowledge of technology to attract to workforce • Chiasm between public, private, and education sectors	• Storm-term employer training • Better connections between workers and employers • Employees have better options • Civil rights enforcement • Local job growth • Universal access to college
System	• Further degradation of treatment of most vulnerable populations • Mechanization eroding safety net • Lack of recognition of high rates of unemployment among certain populations • Uncertain funding / policy environment; increase fragmentation of the system • Growth / expansion of gig economy • System knowledge held chiefly by 'expert' practitioners • Perpetuation of systematic racism and income stratification • Exploitation of vulnerable populations	• Incentives for employers to better train workers • Employees able to support families attending better schools • Re-design not just jobs but green jobs and work that has climate in mind • Compete with University of Phoenix in terms of marketing • Reverse proposition 15 • Actively break down systems of racism and income stratification

Deep Dive Sessions

On the demand side, what needs do employers have (e.g., in terms of hiring, training, and retention of workers)?

- Employers "want <u>skilled</u> workers, <u>when</u> they need them" and they want employees "to show up"
- Employers need support with:
  - Compliance with labor laws given risks with sub-populations (e.g., demystifying fears)
  - Policy training (e.g., education on public policy / insurance)
  - Understanding of cost of talent strategy, frameworks, and tools to assess broader business value
  - Understanding of incentives to gather, report, and share data – beyond placement and longer planning horizons (ex. Aspen business value case, FSG research on retention support, partnership HRM)
  - Customized programs that listen to and adapt to their needs
- As it concerns recruitment and hiring, employers need:
  - Stronger recruitment practices so workers know what is available (e.g., industry specific job fairs)
  - Support addressing unconscious bias in hiring with new approaches (e.g., technology solutions)
  - Balance of speed vs. quality in hiring
- As it concerns retention and advancement, employers need:
  - Strategic and political cover for employer advocates to do what is best for workers (e.g., apprenticeship)
  - Reduced turnover for consistency in workforce
  - Supervisory training of employers to help support, train, and retain workers (e.g., culture shift)
  - Capacity to train workers (e.g., leverage workforce development boards / partner with others for training)
- Other considerations
  - Employer needs should be segmented (by size, sector / industry, region, etc.)
  - Employer engagement requires targeted conversation (*and incentives*) with different levels of employers (e.g., CEO/owner, human resources, and front line manager)
  - There is a need to define what is 'ready' on the employer side to enable success / capacity (e.g., consistent hiring process, retention support, connection to others, etc.)

What are ways to better link the supply and demand sides more efficiently and effectively (e.g., "clearinghouse" platform)?

- Focus on partnership development and relationship building; there is an opportunity to...
  - Move beyond being a 'provider' to being a 'partner' -- where employers value workers beyond the bottom line and stakeholders work together in the tight talent market
  - Encourage employer commitment to fee-for-service programs and help them understand ROI and cost considerations given the understanding that employers invest (*money and time*) in what they find important
  - Utilize 'skills panels' for employer-led education development and training
  - Collaborate 'to win,' increasing peer knowledge exchange with industry councils / sector partners to facilitate employer-peer-learning and communication of talent pipeline needs
  - Shift employer culture to include wrap-around supports

- Better linkages will require improved data / information sharing; there is an opportunity to...
  - Calculate ROI across three levels (e.g., individual, business, and community)
  - Develop innovations to use data and user experience lenses 'to understand / integrate with employer'
  - Tie ROI and capital conversations to understand employer leverage points
  - Utilize tools include alternative assessment and non traditional marketplaces (e.g., LinkinIN for the LinkedOUT)

- Other suggestions
  - Design 'job labs' and identify design / program components that relate to employers
  - Shift labor matching conversations to include NGOs and employers, not just for-profit companies
  - Partner with high capacity intermediaries for recruitment, training, and workforce partners
  - Support public policy to encourage hiring of ex-offenders (ex. ban the box, restrict insurance companies in NY); employers can serve as policy advocates as well as champions (e.g., public subsidies, community benefits agreements, structure for inclusive impact, broad procurement reform)

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What are the different ways that practice-oriented organizations can engage in the policy sphere?

- Make the case / show the evidence
  - Develop a set of shared metrics across organizations to drive policy change (e.g., bubble up metrics for LA and other regions to share the bigger picture)
  - Develop the business case for the work
  - Develop the proof points that can be held up as examples of what works
  - Use language that our audiences use (e.g., ROI)
- Use communications and storytelling
  - Tell the stories that connect to the data, i.e., the human side of data
  - Share the unified story of program participants, CBOs, and employers of why we all need each other
- Support coalitions
  - If an organization can't have a public stance, consider partnering to influence policy
  - Build (or join) a coalition with a policy platform with a set of planks
  - Recognize the difference between advocating for dollars for one's organization vs. being part of a coalition to promote a common agenda
- Enable and support new policy voices
  - *Program participants:* Help program participants build their political voice so they can advocate not just for a single program, but a broader set of policies
  - *Frontline staff:* engage frontline employers to work alongside executives and participants on policy
  - *Board of Directors:* Consider using one's Board of Directors to play a role in policy / advocacy
  - *Employers:* Help employers to craft their policy agendas by seeding them with talking points about what works (but acknowledging that it can be hard get companies to hit on the same talking points that nonprofits care about)
- Other suggestions
  - Become more educated about where the line is around advocacy (since many nonprofits believe that they are not legally allowed to engage in advocacy)
  - Act as 'grasshoppers", i.e., work at the grassroots level and at the grass-tops level
  - Help employers improve the administrative processes that get in the way of hiring certain types of workers – build them as champions of new practices
  - Create incentives that are agnostic of tax status
  - Help funders understand the importance of engaging in policy and ask them to support their work in this domain

At the federal, state, and/or local level, what existing policies need to change or what new policies are needed?

- To increase the "size of the pie" (i.e., the types and amount of money available to the field)
  - Expand who is eligible to bid on PLAs in the construction industry (i.e., non-union companies)
  - Explore if there are other industries/geographies where local hiring ordinances should be amended (CBAs?)
  - Push for increased flexibility about OJT funding
    - Address liability (i.e., workers compensation) issue
    - Reduce administration burden for businesses
  - Broaden the government definition of 'apprenticeships' and/or reduce barriers
    - Expand industries' flexibility on the apprenticeship framework
    - Figure out how to get around the issue with unions (e.g., consider using "Learn and earn" instead)
    - Address the disincentives for employers today (e.g., FLSA)
  - *For small businesses:*
    - Increase the loans available for entrepreneurs
    - Influence how cash flows via the SBA
    - Shape legislation related to 11.11 so funding better serves what CDFIs do
- To "protect the pie:" protect social safety net funding (e.g., housing, food stamps, other basic needs)
- To improve the conditions for workers
  - Amend social safety net funding so that it can be offered on a spectrum, i.e., as a person's income increases, it doesn't lead to net-negative situations for families
  - Change community college remedial education policy
  - Help non-community colleges to be able to offer and accept financial aid (e.g., Center for Employment and Training)
  - Incent businesses to increase benefits for their employees (e.g., update the tax code to incentivize profit sharing)
  - *For small businesses:*
    - Provide benchmarks to small businesses about what benefits to offer
    - Find ways to make health coverage more affordable for small businesses
- Other ideas
  - Government could play a data clearinghouse role for EDD tracking people post-college
  - Rethink how we do public funding from 'time in seat' to 'increases in W2 earnings"

What are the array of metrics used for measuring success at the individual and regional / state level?

Individual Level

Training
- # of people served
- Hours spend participating in higher education or certification
- Predictive indicators of job readiness: come to class, attention in class, intensity of participant, 'test' link to outcomes, etc.
- Participant feedback / NPS score
- Training related placement (e.g., job placement in field of training)
- Industry recognized credentials
- Transferable skills by industry

Hiring / Retention / Advancement
- Interview-to-hire ratio
- Employer time to fill
- Job-readiness (e.g., resume interns, professionalism, etc.)
- Conversion from intern to hire
- Contract vs. permanent hires
- % still employed by firm
- % still in industry
- % still in labor force
- Sustainable wage and benefit growth
- Promotion rates from programs

Other
- Family outcomes for the children of job seekers (e.g., two generation)
- Individual goal setting as proxy for self-actualization / agency
- Job satisfaction / interest / passion
- Reduce recidivism rates

State Level

Labor Force Measures
- Unemployment and under employment rates
- % of people in labor force
- % of long term unemployed
- Wage growth [also analyze by race, micro-geographies, region, industries, business size, etc.]
- Job creation (#new jobs)

Employer Measures
- Job quality (e.g., wages, benefits, managerial skill, scheduling, etc.)
- Equity in hiring practices

Employer Measures Continued
- Diversity in workplace
- Openness to hiring job seekers without four-year degrees

Community Level Measures
- % of a workforce population that has a quality, industry recognized credential in the region
- % of people with recognized skills
- Measures from Opportunity Index
- NCCER measures
- Outcomes correlated to training and employment (e.g., poverty, violence, crime, and health)

ROI Measures
- Dollars invested per student, % successful in job placement
- Dollars invested per student, % wage increase over lifetime
- Opportunity cost

Others
- Changes in public policies and practices that prompt evidence-based workforce interventions
- Quality of life (e.g., affordable housing, reasonable commutes)
- At community colleges, understand placement and job quality outcomes

What should be used to define success for California as a whole?

What are the indicators of success? In the medium-term (2-3 years)? In the long-term (5-10 years?)

In addition to the current measures of success, this group discussed a handful of additional ones:

Job Seekers
- Significant decrease in the number of opportunity youth as more gain post-secondary certificates and start work
- Understanding other related outcomes correlated to economic opportunities (e.g., commute, housing, expenses, health, diabetes, heart disease)
- Income is important but making sure people have a manageable debt burden to ensure people get ahead

Employers
- Feedback loops in defining what is a good job
- Employers are open to analyzing where they get talent and open to hiring skilled workers that don't come from traditional channels
- For small businesses -- access to capital: crowdfunding, branded capital, etc.

Workforce Development Organizations
- As scale is a challenge for workforce organizations, there is an opportunity to measure quality of programs reaching more people and the % of population served (e.g., what it takes to increase serving 2% to 4% of the population?)
- Employers keep coming back
- Movement of funding from pay-for-service to pay-for-performance (e.g., look at outcomes not activities with WIOA funding for a pay-for-success pilot)
- Recognizing that a degree does not equal competencies, developing ways to measure skills outside of a traditional credentials

Others
- Opportunity Index provides additional measures highlighted by participants
- Over the longer term, there is a vision for workers and their families to experience social and economic mobility

What should be used to define success for California as a whole?

What data needs to be gathered and / or shared better? How?

- **Share Labor Market Information** – training programs, job seekers, and employers don't have quality, real-time labor market data and are unable to make efficient decisions about time and resource allocation. The vision is to create a real-time database of labor market information that can be used to better train and connect workers to jobs as they open and close

- **Collect Passive Data** – gathering tax, EDD, and W-2 data to better track participants without additional administrative burden of surveys, phone calls, etc.

- **Establish Benchmarks** – there are limited standards and comparative data between nonprofits serving similar populations that could be leveraged for better outcomes and reduced program cost (e.g., when designing a program to train a cohort of 100 prisoners there are no benchmarks for expected recidivism rate or employment retention rates?)

- **Aggregate Data** – there is a significant amount of available workforce data with an opportunity to improve both broader understanding as well as aggregation across the field (e.g. Dept. of Treasury, Dept. of Labor, Small Business Administration, Bureau of Labor Statistics, etc.)

- **Work with Employers** – employers collect various measurements pertinent to workforce development agencies; accordingly, there is an opportunity to enlist their support in helping them understand their data better especially concerning retention (e.g., wage growth, promotion growth, retention, exit interview measures)

- **Understand Real Poverty** – income is only half of the poverty equation; accordingly, there is a need to take into account real cost of living expenses to gain a better understanding of real poverty. Such measures would benefit from a broader understanding and acceptance (e.g., CA Poverty Measure, Real Poverty Measure, Supplemental Poverty Measure)

- **Change Data Policy** – there is an opportunity in working with the government to change certain data policies restricting relevant data sharing that could benefit actors across the workforce ecosystem

Intermediaries

Given the robust discussion about linking supply and demand, participants had a follow-up conversation about the role of intermediaries to ensure that the conversation is a 'two-way-street' between supply and demand.

Accordingly, participants highlighted several **pivotal roles for intermediary organizations:**

- Translating, reporting, and packaging information (e.g., concerning populations, recognizing that many employers are agnostic and suggesting that service providers not lead with 're-entry populations' as a conversation starter)
- Bringing together employers (e.g., collective definition of work-ready)
- Working with Industry (e.g., brining employers into the worker training processes)
- Brokering between supply and demand (e.g., balance long and short term goals, share principles / feedback, etc.)
- Building networks of supply and demand
- Setting standards (e.g., public workforce boards needing to define better standards)
- Providing labor market information
- Aggregating data

In contributing to scale, intermediaries can:

- Provide support via tools, processes, networks (industry association) at both the local / enterprise level
- Assist the workforce system (e.g., track activities not outcomes, communication support, define flexible metrics, etc.)

DEEP DIVE SESSIONS: ENTREPRENEURSHIP AS A PATHWAY

What are the critical needs of entrepreneurs to become successful?

As entrepreneurs work to transition from a 'side hustle to an entrepreneurial business,' they **needs** support in two key areas:

Financing
- Access to capital
- Support managing basic cash flow risks and fluctuations
- Help defining the business model and how to articulate it
- Ability to sustain themselves early

Technical Assistances
- Support in building "connecting" and soft skills
- Mentoring / advising resources and training to help scale
- Resources concerning relevant systems, policies, etc. to help navigate requirements (e.g., permits, wage laws)

As our society and economic rethink 'work,' there are clear **opportunities** to engage entrepreneurs:

Provide Mentoring
- Practical engagement (e.g., "shadow an entrepreneur," match advisors, etc.)
- Access to networks (e.g., create bridges to existing and new network like the chamber of commerce)
- Sustainable engagement to build trust and feedback
- Viable assessments of business; diagnostic not just prescription (ex. business works; online mentoring platform)

Support Scaling
- Define milestones (ex. help facilitate first hire; underwrite criteria for levels of capital / mapped to system structure, processes, and practices for businesses at this stage)
- Enable discussion that entrepreneurs should have a choice to scale larger or choose that family sustaining entrepreneurship is enough

	What factors are important to consider in understanding regional differences and similarities?
Demographics	• Age of population, population density, ethnic diversity • E.g., Coastal regions: tend to be more liberal, higher education levels, higher cost of living areas, more diverse, more politically active
Educational attainment / Skills levels	• Reading, writing, numeracy levels • Soft skills • Social capital to enable social mobility

Availability and quality of partners	• Nonprofit ecosystem varies significantly by region, which can lead to chronic marginalization of populations in certain regions
	   • Bay Area: strong ecosystem
	   • LA: strong ecosystem mainly downtown and west, but not south

Regional policies	• Local municipality policies, particularly housing policies
Industries	• Coastal areas: more variety of industries • Inland areas: have fewer industries and less diversity of industries
Quality of Infrastructure	• Transportation: in many regions, workers need to have their own vehicle, while in others they pay for the distance they need to travel. Both are challenging and impact workers' salary levels. • Availability and access to community colleges / 4-year colleges: many places only have one option, or it is at a far distance • Access to technology / Wi-Fi: many places still do not have Wi-Fi access • Rate of development: new construction, new homes being built, etc. varies by region
Cost of Living	• Housing costs vary dramatically by region
Power dynamics	• # of people of color in power (power dynamics) / empowerment of marginalized communities • Relative wealth distribution
Other Factors	• Amount of philanthropic $ available, access to capital, magnitude of demand by region

How do these factors intersect with each other to make the different regions unique?

- Inland Empire
  - Size: Made up of a larger land area (20,000 sq. mi.) than 9 other states
  - Transportation: workers must travel long distances; there is no mass transport
  - Technology/Wi-Fi: does not always exists
  - Industries: manufacturing, logistics
  - Culture of San Bernardino: blue collar community
  - Unions: Not highly unionized
  - Ecosystem: it's well-connected
- Fresno
  - Lacking in opportunity

- LA (vs. Bay Area)
  - Geographically sprawling
  - No single identity
  - No coordination of WIBs
  - Less organized politically
  - Race / ethnicity plays a major factor
  - Strong LA Chamber of Commerce – it is a national leader

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Portfolio Advisor Activity

OVERARCHING THEMES

- **Improved data** standards, transparency, and synthesis were highlighted as opportunities for innovation and greater impact across the workforce and employment system

- **Storytelling** in order to influence discourse, narrative, and decisions was described as an important complement to better data

- Grantees were keen to **engage employers** and also to push them to step up on topics like inclusive hiring, wrap-around services for retention, creating supportive cultures, and better training managers

- There is strong recognition of the value of **policy** as a lever for change, a robust discussion on how best to engage, and an overall desire to preserve sustainable public funding

- All groups agreed on the need for **state-wise impact** and some highlighted specific **regions** as ripe for piloting initiatives and as key leverage points across the state

- The desire to create **coalitions**—for learning, policy advocacy, or data sharing—were emphasized by multiple groups

PORFOLIO ADVISOR ACTIVITY: GROUP RECOMMENDATIONS

	If we had $50M, we would …	With an additional $25M, we would …
1	• Employer Engagement ($25M) • Data ($10M) • Regional Priorities ($5M) • Demand Driven Talent Development ($10M)	• Innovation Investment Fund ($10M) • Filling Regional Gaps ($10M) • Double Down on Priorities ($5M)
2	• Statewide Policy ($10M) • Direct Service Practice ($30M) • Strategic Communications / Public Will ($10M)	
3	• Learning / Scaling / Evaluation ($30M) • Policy / Sustainable Funding ($10M) • Storytelling / Communication to Public ($3M) • Demand-side Employer Engagement ($7M)	• Prize to Fund Existing Initiatives ($10M) • Storytelling of Learning / Scaling Efforts ($5M) • Evaluation ($10M)
4	• State Level Work ($10M) • Regional Level Work ($40M)	• More regional work ($25M+)

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If we had $50M, we would …	With an additional $25M, we would …
1 • **Employer Engagement ($25M)** *– new, simpler ways to engage small orgs; extend services/needs assessment of employer groups* • **Data ($10M)** *- aggregate, share, and disseminate data in new ways* • **Regional Priorities ($5M)** *– understand critical needs; set goals; mobilize players and action towards goals; create new partnerships to fund gaps* • **Demand Driven Talent Development ($10M)** *– create new capacity and tools*	• Innovation investment fund ($10M) • Filling regional gaps ($10M) • Double down on priorities ($5M)

WHAT WE DISCUSSED

- High need for deep investment in employer engagement in several areas:
    - Create mechanisms that facilitate engagement and interaction with small businesses and entrepreneurs. These groups have the most flexibility and are often interested in "the social cause" but difficult on both sides to interact.
    - Find new ways to add value to employers in order to change the conversation. Ideas included funding skills assessment for groups of employers (as they struggle with this) and match to available programs/talent development providers.
    - With information from above, build/utilize a platform (data/technology plus relationships/convenings) to improve flow of information between supply and demand side players
- Need for policy reform regarding data access and sharing. With improved data access and aggregation there is a high need for alignment around measurement of success.
- Need for regional investment is clear but understanding of the best levers/opportunities in each is not; a common understanding would allow funders and others (nonprofits looking to scale) to better meet needs.

If we had $50M, we would …	With an additional $25M, we would …

2
- **Statewide Policy ($10M)** – *protecting / amending social safety net*
- **Direct Service Practice ($30M)** – *achieving career mobility in Bay (career advancement), LA/SD, and Fresno/Central Valley regions (job creation); actively break-down silos/learning, listening*
- **Strategic Communications / Public Will ($10M)** – *focus on workers and quality jobs*

WHAT WE DISCUSSED

- Emphasis on **mobility**—both **economic mobility** and **career advancement**: includes improving access to jobs, readiness for jobs, and job quality (which incents someone to want the job)
  - There are different levers for working on this—for individuals and for companies—but both groups are interested in helping competent people to move up and free up jobs for others
- **Statewide policies around the social safety net:** we need to understand where the thresholds lie, what the total package of wages and supports might be, and how to prevent people falling off the "cliff"
- **Influence / strategic communications** to influence discourse and narrative in communities
- Regions should be customized (e.g., Fresno for job creation; Bay for career advancement; etc.)
- Need for **standards, definitions, and metrics** around what "high quality work" means, what "Californians" we're talking about, etc.
- Need for **funding targeted** to break down silos (e.g., at the intersections of workforce and SMB, capital and talent, workforce and entrepreneurship, etc.) as well as capacity to listen, learn, test, and evaluate
- Need to determine whether this is an **"intervention portfolio" or a "prevention portfolio"**, which could be informed by understanding the magnitude of need by region and by adults vs. youths

If we had $50M, we would …	With an additional $25M, we would …
3 • **Learning / Scaling / Evaluation ($30M)** – flexible money for *proof of concept scaling; fund design and strategy of evaluation ($5M of $30) (e.g., technical assistance, infrastructure, etc.); depth of advancement as priority* • **Policy focused on sustainable funding ($10M)** – *innovative funding mechanisms can be regional or statewide (policy focus is $5M of the $10M)* • **Storytelling / Communication to Public ($3M)** – *intersection with data to address public perception and public will* • **Demand-side employer engagement ($7M)** – *tailored based on size of employer (ex. recognize capacity and partnership approach with smaller organizations)*	• Prize to fund existing initiatives *(restart / sustain)* ($10M) • Storytelling of learning / scaling efforts ($5M) • Evaluation ($10M) - *$5M for strategy and R&D; $5M for other evaluation*

WHAT WE DISCUSSED

- This work requires meaningful **relationships with employers** (they are experts at what they need)
- Balance **scale and depth** (healthy tension); need to identify how to track (benchmark) timing to scale
- **Duration / longevity of funding** -- need for patient capital to restart / pick-up / sustain initiatives towards the end of their funding for long term change (ex. sustain economic mobility)
  - Foundation has flexible and creative imagination; accordingly, Irvine can fund things that cannot be supported with public money
  - Early inclusion of **sustainability**; role for innovative funding mechanisms / solutions
- **Customer feedback:** measurement / identification of root causes for both workers and employers
- Regions are under resourced and have varies levels of infrastructure (ex. Inland empire)
- **Strategic communications / public will / influence** – build an understanding and broader value proposition to define measures and impact; shift employer perceptions; champion to reframe public understanding of middle skills
- **Evaluation** -- we need to know what works (ex. longitudinal research, rapid evaluations, quality assurance, cost / administrative burden considerations, building capacity for evaluation strategy, etc.)

If we had $50M, we would …	With an additional $25M, we would …

4

- **State Level Work (~$10M)** – *focus on creating a coalition to advocate for policy change, creating a coalition of businesses to influence corporate and public policy, analyzing and synthesizing data, shifting the state's data policy*
- **Regional Work (~$40M)** – *work at the regional level to understand regional needs and create regional strategies; fund organizations that authentically incorporate workers' voices, are demand driven and help meet business needs, and have an eye toward vulnerable sub-populations in each region. Fund in 5-8 regions (likely closer to 5)*

- More regional work ($25M+)

WHAT WE DISCUSSED

- Aspiration-wise, the goal is income mobility , but we can't measure that in 5-7 years. Instead focus on measures like credentials, progress along career pathways, and those making the "hop" from low- to middle- skill jobs
- Money goes fast, especially in the regions. $40M over 5 years in 5 regions equals $1.6M per region per year.
  - Irvine could consider a larger initiative as participants felt that $2-5M per year per region could be spent; that equals $50-$125M total spent in 5 regions over 5 years.
  - Irvine could also look to match funds from other state, national, or regional funders. National and state funders would be prime candidates to support state-level work while regional funders could support regional work
- Also consider:
  - Evaluation: RCTs are less useful but it important to have some data to help orgs improve and show efficacy
  - Capacity building: Continue to fund group convening and learning alongside funds for individual organization to build out their own data, policy, advocacy, intermediary, or beneficiary feedback abilities
  - The intermediation role is important, and Irvine will need to consider how to define it, who should do it, and how job quality plays in

Appreciations

APPRECIATIONS

We would like to thank the following people for the contributions before and during the convening that help us all further our understanding of the California workforce and employment ecosystem:

Organization	Name	Title
Center for Employment Opportunity	Sam Schaeffer	Executive Director and CEO
Center for Employment Opportunity	Lonnie Tuck	Oakland Director
Center for Employment Opportunity	Dane Worthington	Economic Opportunity Director
Fresno Community Development Financial Institution	Tate Hill	Senior Manager for Administration
Fresno Community Development Financial Institution	Jeremy Hofer	Senior Manager for Operations
Grads of Life	Elyse Rosenblum	Principal
Industrial Technical Learning Center at Chaffey College	Sandra Sisco	Director Employment Development & Community Education
Industrial Technical Learning Center at Chaffey College	Kenneth Eaves	Deputy Sector Navigator, Manufacturing
Industrial Technical Learning Center at Chaffey College	Deborah Smith	Economic Development-Community Training Coordinator
Jewish Vocational Service	Abby Snay	CEO
Jewish Vocational Service	Lisa Countryman	Vice President, Grants and Program Development
LeadersUp	Jeffery Wallace	CEO
LeadersUp	Corey Matthews	National Director of Impact
National Skills Coalition	Andy Van Kleunen	CEO
National Skills Coalition	Amanda Bergson-Shilcock	Director of Upskilling
Rubicon Programs Inc.	Jane Fischberg	CEO
Rubicon Programs Inc.	Rob Hope	Chief Program Officer
San Diego Workforce Partnership	Andy Hall	Vice President & Chief Program Officer
San Diego Workforce Partnership	Karmin Noar	Director, CONNECT2Careers
Tyton Partners	Adam Newman	Managing Partner
Tyton Partners	Jeff Dinski	Director
Year Up	Molly Sims	Senior Director of Philanthropy
Year Up	Emily Schaffer	Executive Director, Year Up Bay Area

Feedback

CONVENING FEEDBACK: KEY THEMES

(+)

- "Amazing," "refreshing," and "open" dialogue

- Great location and logistics

- Irvine Team open to feedback

- Ability to make connections across the workforce and career landscape and across the state

- "Powerful" and "tough" portfolio advisor activity that felt concrete and brought the convening together

- "Valuable" time spent together

(▲)

- More diverse perspectives in room (e.g., workers, youth, employers, etc.)

- Some felt that more detailed guidelines, parameters, and definitions would be helpful, especially for the portfolio advisors sessions

- Writing, capturing, and facilitating small group discussions was difficult—consider recording

- Heavy reliance on verbal participation

- Critical that future sessions are "cumulative" and build off of this one

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(+)	(▲)
• Amazing dialogue in work groups	• Other non-practical program model presentations
• Open dialogue = refreshing	• Space for intersection conception / testing brainstorming between supply and demand organizations
• Good job making us all change groups frequently and good job on meeting logistics	• Include worker voice in conversation
• Warm / welcoming Irvine Team atmosphere, food, facilitation, coordination, communication leading up to convening, and felt listened to / valued for our thinking	• Would love to have had even more intention around bringing in voices of workers / populations we're trying to serve
• Really strong facilitation and synthesis of ideas	• More diverse perspectives in room (e.g., youth, job seekers, employers, economist, innovators, and organizers) to spur more new ideas
• Nimble facilitation	• Parameters of possibilities so broad that focusing was difficult especially in the last session (also meant there were great opportunities)
• Beautiful location; great to get away and to focus	
• Good pacing and duration of conference	
• Irvine staff very open to feedback and ideas	• More detail on guidelines / task on initiative design, goals, and process
• Mixing workforce practitioners with demand side practitioners helped generate new thinking	• Facilitations with reliance on verbal participation can perpetuate norms of dominance and marginalization and create presentation / confidence bias
• Lots of smart, thoughtful people; people took high road and did not speak solely from self interest	
• Loved the concreteness of the discussion, there was a real sense of why the conversation matters and our time spent was valuable	• Lots of facilitator voice in synthesis – would have loved for more participant voice in participation
• Great to learn more about other programs, strategies, and work with employers – we could have used more	• Variable facilitation – would be helpful to record small groups so facilitators didn't have to write as well as facilitate and synthesize
• Great (and rare) opportunity to connect with similar organizations from across the state	• Diversity of break out session methods
• Group brought earnest thoughts, not jockeying for future funding – good naming up front	• Start with common definitions – name false narratives limits old ways of thinking
• Final exercise was tough and very powerful; really crystalized the prior day and a half	• Critical next session builds on this – this is cumulative
• Really liked the portfolio advisors activity – made everything very concrete	

Appendix

CONVENING SYNTHESIS: AGENDA

Day 1

Act I: Build Common Understanding

10:00 – 10:45 am	Welcome & Introductions
10:45 – 12:30 pm	Understanding the Landscape
12:30 – 1:00 pm	*Lunch*

Act II: Explore Areas of Opportunity

1:00 – 3:45 pm	Exploring the Landscape: Deep Dive Sessions (Part 1)
	• Linking Supply & Demand / Employer Engagement
	• Policy and Practice
	• Evaluating Impact: What Does Success Look Like?
3:45 – 4:45 pm	Exploring the Landscape: Deep Dive Sessions (Part 2)
	• "Go West, Young Person": Entrepreneurship in CA
	• "It's a Big State": Regional Variances across CA
4:45 – 5:30 pm	Day 1 Wrap-Up
7:00 – 9:00 pm	*Dinner*

Day 2

Act III: Provide Input into the Plan Going Forward

8:30 – 9:30 am	*Breakfast*
9:00 – 9:30 am	Day 1 Reflections
9:30 – 12:30 pm	Advising on the Initiative Design: Portfolio Advisors Session
12:30 – 1:00 pm	Wrap-Up & Close
1:00 – 2:00 pm	*Lunch & Optional Round Table Discussions*

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California Career Readiness and Living-Wage Work Ecosystem

SUPPLY-SIDE EFFORTS

DEMAND-SIDE EFFORTS

INTERSECTION EFFORTS

Programs and initiatives focused on creating career pathways that include multiple elements such as credentialing, apprenticeships, work-based learning, and /or wraparound supports and connect people to middle-skill careers or entry-level roles that have clear opportunities for advancement

Programs and initiatives focused on improving the efficiency and effectiveness of the interaction between the supply- and demand-sides

Programs and initiatives focused on increasing the number and quality of living-wage jobs and improving the hiring, retention, and advancement practices of employers

SYSTEM-WIDE EFFORTS

Efforts to impact how the workforce system operates as a whole

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