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Evaluation of LISC's Occupational Skills Initiative (OSI) Pilot

Findings from In-depth Interviews with LISC Program Officers, Program Participants, and Staff from Five Sites

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Executive summary

About the Occupational Skills Initiative

In 2017, Local Initiative Support Corporation (LISC) contracted with Wilder Research to conduct a process evaluation of its work with seven community-based organizations (CBOs) that developed and implemented industry-contextualized bridge training programs over a two-year period (April 2015 to March 2017). These programs help individuals build their academic, employability, and technical skills to obtain a job in middle-skills occupation. This effort, called the Occupational Skills Initiative (OSI), was funded by the W. K. Kellogg Foundation and was the initial pilot of LISC's Bridges to Career Opportunities (BCO) initiative. OSI provided funding and technical assistance to Financial Opportunity Center (FOC) partners seeking to develop and expand career pathways initiatives in Houston, San Diego, Indianapolis, Chicago, Detroit, and the Twin Cities. FOCs are career and personal finance service centers that help low- to moderate-income people build smart money habits and focus on their financial stability and success. They do this by delivering 1) employment services such as job placement and career coaching, 2) financial coaching around budgeting, debt reduction, and credit building, and 3) counseling for income supports like SNAP (Supplemental Nutrition Assistance Program) and utilities assistance. The purpose of OSI is to improve FOCs' ability to connect clients to middle-skill job training and credentialing that leads to jobs with living wages and career growth opportunities. Key components of this model include: bridge training, identification of in-demand sectors and industry-recognized credentials, clearly-defined academic and career pathways, and coaching and supportive services. At FOC sites, these components are layered onto existing services and supports.

Evaluation data

To evaluate the implementation of the OSI model, Wilder Research conducted in-depth interviews with LISC program officers, FOC site staff, and program participants at participating sites. The findings from these interviews provide (a) a better understanding of the successes and challenges of implementation, (b) whether partner sites' capacity to serve families, engage employers, and/or expand career pathways resulted in increases in financial and economic attainment for participants, and (c) lessons learned for the workforce development field. The goal of this evaluation is to act as a learning and management tool for LISC's Family Income & Wealth Building team to better develop and implement programs, partnerships, and opportunities for the communities served by LISC and its partners. The research findings may also be used to inform the design and implementation of bridge and career pathways programming in the field.

Key findings and lessons for the field

The success of the OSI model is due in large part to clients' access to and engagement in the full suite of Financial Opportunity Center (FOC) services that go beyond what is offered in a traditional occupational training program. While four critical components were present at each FOC, it is clear from the interviews that much of the success of the implementation of the OSI model was due to the flexibility in the way sites were able to implement and integrate these components into their existing services. Some of this need for flexibility is due to differences in the local economies (both on the employer side and on the labor force side) in which these sites are operating. Other differences may be due to how the OSI pilot program was layered on top of existing programs and relationships these sites had in place prior to OSI implementation. Despite differences in site implementation, most sites did appear to implement the OSI model in a sequenced fashion that 1) provides a baseline of FOC support (employment, financial, and income supports coaching) throughout OSI program engagement; 2) offers group-based bridge training that is (a) contextualized to an industry of focus and (b) works to improve participant literacy and numeracy skills in preparation for more advanced occupational training; and 3) matriculates students into advanced occupational training programs achieving industry-recognized credentials following bridge program completion.

Bridge programming

All sites successfully implemented bridge programming to help participants prepare for occupational skills training. Bridge programs prepare adults with limited academic or limited English skills to enter and succeed in credit-bearing postsecondary education and training leading to career-path employment in high-demand, middle- and high-skilled occupations. While some sites provided instruction in-house by hired staff, others contracted with outside entities. Overall, participants were given the academic support and remediation aimed to improve their math and reading skills to meet requirements to participate in a credential-earning or pre-apprenticeship program. During the OSI implementation, sites improved their bridge programming by re-evaluating what was working and where programming needed to be modified. Several sites found it helpful to administer an assessment (i.e., the Test for Adult Basic Education (TABE) test) to assess individuals' skills and aptitudes in reading, math, and English in order to develop an individualized plan for each client. Many sites were challenged to identify appropriate participants for their program (i.e., people with the required reading or math skills upon entry, people with time and flexible schedules, people willing to commit to a long-term program).

Insights from site staff, LISC program officers, and program participants offered many lessons learned for the workforce development field regarding each component of the OSI model. During the development and implementation of a bridge program it is critical that the academic and career pathways that are chosen to be offered is guided by an in-depth understanding of the population served. It is also important to meet clients at varying academic and skill levels. Additionally, it can be beneficial to invite past participants that have been successful to come to the program and talk about their experience with taking bridge classes and their experience after completing a bridge program.

In-demand sectors and industry-recognized credentials

According to those interviewed, overall, sites were able to successfully connect clients to career opportunities through occupational training programs. Programs often included site visits and other hands-on, real-world experiences. Each site identified industries and job sectors that are growing rapidly in their city. The most commonly targeted industries across sites are health care and manufacturing. Site staff and LISC program officers felt that OSI funding played a critical role in helping sites to deepen, expand, and develop new relationships with employers and skills training providers to improve their bridge programming and career pathways. Sites developed partnerships with a variety of employers and skills training providers, including universities, community colleges, hospitals, unions, private companies, hotels, restaurants, and schools.

When identifying in-demand sectors, it is important to choose career options that have opportunities for professional growth over time and to identify sectors that are penetrable for job seekers, as well as provide opportunities for advancement. Another key factor in participant success is identifying industries that are best suited to the demographics and/or interests of the population served. Site staff and LISC program officers talked about the importance of engaging employers in the development of the program and the curriculum as a strategy to get buy-in and develop a mutually beneficial relationship. It is helpful to partner with employers and skills training providers who share similar values as the FOC site (e.g., have career advancement and training opportunities, offer good support for new hires).

Clearly-defined academic and career pathways

All sites have a clearly-defined academic and career ladder that is communicated to program participants. However, each site has different and often multiple ways of communicating these pathways to clients. Academic and career pathways were often shared visually via presentations or handouts. These communications strategies were sometimes used as a tool to recruit program participants by describing to participants how they might benefit from participating in bridge programming and occupational skills training.

Discussing with and reminding clients of the academic and career ladders they had chosen, site staff worked with them to envision, reach, and achieve their individual academic and career goals. Communication about the academic and career ladders was ongoing and helped participants think about their long-term career path rather than a single job. While most program participants benefit from following a clearly-defined pathway, many do not end up following a linear path to obtaining a career.

Site staff felt that it is important to clearly communicate academic and career expectations to their clients prior to beginning the training. This can help identify the best candidates for the program - those who are ready or situated appropriately to be successful in bridge programming. In addition to clearly communicating, it is helpful to remind participants of career pathways options and revisit individual goals along each step of the pathway. Reiterating the pathway can help clients stay on track, focused, and motivated to reach their goals. When working with a contractor to provide contextualized academic training, the contractor and FOC site should agree on shared expectations of the clients to avoid confusion for the client. Although sites have a clearly-defined pathway, clients do not always find employment right away. It is important for site staff to continue to provide supports for clients who are not able to find work despite completing their academic and career training programs.

Coaching, navigation, and supportive services

As FOCs, sites provide a range of supportive services, including financial coaching (e.g., budgeting, credit building, and record expungement), career coaching (e.g., goal setting, career exploration, resume and interview skill-building, and soft skills), child care, transportation, financial assistance, and emotional support. Most sites provided a combination of one-on-one and group coaching to identify potential barriers and to work with clients to address problems as they arise. Many bridge training participants developed a meaningful relationship with their bridge instructors or coaches. Beyond the academic and occupational instruction, participants felt emotionally supported by their instructors and coaches. Coaches at many of the sites take great lengths to stay in contact with participants after they have graduated from the program, and many participants continue to work with financial coaches after they have completed job training.

Some helpful aspects of coaching for clients included, 1) incentivizing program participants to come back and use supportive services such as financial coaching even after the training is completed, 2) maintaining long-term and consistent contact with coaches can be helpful to the client to keep them on track and engaged in working towards their goals, and 3) having multiple points of contact with flexible office hours for the clients. Some sites struggled with the integration of financial coaching services, other supports, and bridge program training.

The OSI model is intended to be fully integrated into FOC services, including participants having access to the supportive services available through these organizations. Currently provided ad hoc by coaches and instructors, program participants may benefit from receiving formal emotional support services. Sites might consider developing a position to provide emotional support services for clients (e.g., a counselor or therapist), requiring that coaches have a specific set of interpersonal skills or behavioral health training, and developing referral relationships with behavioral health providers in their area.

Additional key elements of OSI implementation

For many program participants, providing a stipend made it possible for them to participate in bridge training because it made it more affordable. In order to recruit participants that might take a low-wage job instead of entering a training program, it is preferable that an incentive or stipend is provided, however, some sites have been successful without this component. For some, receiving a stipend may be the only way for them to afford to participate in a long-term program. Another option, suggested by a LISC program officer, would be to connect participants to potential part-time work that requires different hours than the bridge training schedule so that they still have an income during the training period.

Due to the difficulty of finding appropriate candidates for occupational skills training, sites might consider using marketing techniques to strategically advertise their program to potential participants. Once appropriate candidates are identified, their interests, abilities, and commitment should be discussed before beginning an occupational skills program. Screening protocols, including interviews and thorough intake processes, can be a useful tool for staff to identify the services that are the best fit for their clients' needs and lead to an effective use of funds and time. Making courses accessible and accounting for barriers in participants' lives by providing additional supports can assist with retention. While bridge programming instructors should understand the industry and have professional experience working in the field, it is equally important to have instructors and coaches who can connect with students and provide the encouragement and emotional support that clients have described as a critical contributor to their success.

Background

Local Initiatives Support Corporation (LISC) believes that “healthy, sustainable communities are made up of people who have living wage jobs and feel confident about their economic futures,” and that “to get there, residents need the skills to advance along the path of employment and manage their money well.”

“LISC describes its financial stability programs as connecting low- to moderate-income families with the financial and labor market mainstream.” These initiatives include a national network of 80+ Financial Opportunity Centers (FOCs), 32+ occupational skills training and Bridges to Career Opportunities programs, and credit-building products like Twin Accounts. To learn more about LISC’s financial stability work and past evaluation, [please visit http://www.lisc.org/our-initiatives/financial-stability/](http://www.lisc.org/our-initiatives/financial-stability/).

In May 2017, LISC contracted with Wilder Research to conduct a process evaluation of its work with seven community-based organizations (CBOs) that developed and implemented industry-contextualized bridge training programs over a two-year period (April 2015 to March 2017). This effort, called the Occupational Skills Initiative (OSI), was funded by the W. K. Kellogg Foundation and was the initial pilot of LISC’s Bridges to Career Opportunities (BCO) initiative. OSI provided funding and technical assistance to Financial Opportunity Center partners seeking to develop and expand career pathways initiatives in Houston, San Diego, Indianapolis, Chicago, Detroit, and the Twin Cities.

LISC’s Occupational Skills Initiative (OSI) theory of change

According to LISC, the Financial Opportunity Center (FOC) model is a proven integrated service delivery strategy designed to equip low-income people with the tools, motivation, and know-how to boost earnings, build credit, reduce expenses, and make sound financial decisions that build assets. LISC launched the Occupational Skills Initiative (OSI) in 2013, with funding from the W. K. Kellogg Foundation, to improve FOCs’ ability to connect clients to middle skills job training and credentialing that leads to jobs with living wages and career growth opportunities.

OSI incorporates four key components that are believed to be essential to clients’ long-term success:

- **Bridge programs to address academic readiness gaps:** Academic bridge programs provide FOC clients with the foundational skills that help them qualify for and succeed in middle skills training programs. Crucial for job success, the bridge programming is also contextualized, meaning that the curriculum incorporates industry-specific content into basic skills lessons.

- **In-demand sectors and industry-recognized credentials:** OSI focuses on sectors or industries slated for growth in a particular city or region and prioritizes attainment of industry-recognized credentials.
- **Clearly-defined academic and career ladders:** OSI programs must clearly illustrate the steps in a career pathway, the time investment in training required by each part of the pathway, and the types of jobs and wages that can be achieved by completing each level of training.
- **Coaching, navigation, and supportive services:** FOC coaches provide core wraparound services that include financial coaching, access to public benefits, and career counseling.

Study methods and purpose

In June 2017, Wilder Research conducted in-depth interviews with six LISC program officers, 14 FOC site staff, and 15 program participants at five of the seven sites that participated in the implementation of the OSI model. Two sites located in the Twin Cities, Lutheran Social Services and Emerge, did not participate in the evaluation due to site capacity concerns or significant variation from the model. See Figure 1 for a detailed breakdown of interview participants. Participating sites received a \$1,000 stipend for their participation in this evaluation (including staff time to be interviewed and help to identify and recruit program participants). Program participants received a \$50 Visa gift card to thank them for their time. Interviews were conducted over the phone and lasted approximately 30-60 minutes. The findings from these interviews provide (a) a better understanding of the successes and challenges of implementation, (b) whether partner sites' capacity to serve families, engage employers, and/or expand career pathways resulted in increases in financial and economic attainment for program, and (c) lessons learned for the workforce development field. See the Appendix for interview protocols.

1. Number of people interviewed

Site name	LISC program officers	Site staff	Program participants	Total
Instituto del Progreso Latino, Chicago	2	3	3	8
International Rescue Committee (IRC), San Diego	1	2	3	6
Mary Rigg Neighborhood Center, Indianapolis	1	3	3	7
SER Metro-Detroit, Detroit	1	3	3	7
Wesley Community Center, Houston	1	3	3	7
Total	6	14	15	35

The goal of this evaluation is to act as a learning and management tool for LISC’s Family Income & Wealth Building team to better develop and implement programs, partnerships, and opportunities for the communities served by LISC and its partners. The research findings may also be used to inform the design and implementation of bridge and career pathways programming in the field.

Research questions

The interview protocols were designed to answer the following process evaluation questions:

1. What are the variations in implementation of the Occupational Skills Initiative (OSI) model, and to what degree of fidelity has programming been implemented across sites?
2. How did partnering sites develop, assess, and modify bridge training curriculum based on successes and/or challenges in implementation?
3. How many of the FOC sites identified and added additional career pathways to expand options for participants, and what were those pathways?
4. To what extent have the FOCs deepened their engagement with employers?
5. In what ways are the participating OSI sites tailoring their services, if at all, to meet the specific needs of parents (and what is known of parent/family demographics, including barriers)?
6. To what extent have sites participated in local/regional policy discussions to influence a greater focus on job seekers with high barriers and financial coaching (with a special interest in Workforce Innovation and Opportunity Act (WIOA) planning and implementation at local/state levels)?

Data analysis

The interviews were analyzed using an open-coding scheme, in which the interview transcripts were reviewed and themes were identified and modified throughout the analysis process. The transcripts were also reviewed and analyzed to identify key themes unique to different groups of respondents (program participants, program staff, and LISC program officers).

Limitations

Findings from this evaluation should be interpreted with caution, as interviews were conducted with a small number of people from each site. Responses from site participants and staff are not necessarily representative of all staff and participants involved in the implementation of the OSI model. Although data from interviews provide depth and context, they can also be incomplete. For future evaluations, adding a participant follow-up survey to the methodology may garner more complete data and a clearer evaluative picture.

Implementation of the four key components of the Occupational Skills Initiative (OSI) model

The key components of the OSI model, as described previously, include bridge programming; a focus on in-demand sectors and industry-recognized credentials; a clearly-defined academic and career ladder; and coaching, navigation, and supportive services. The following sections describe the key findings, successes and challenges, and lessons learned from the participating sites. While all participating sites are FOCs, there are unique successes and challenges experienced by each site that are dependent on many factors (i.e., growing industries in the city, prior relationships with employers, staffing, past experience with occupational skills work, type of clientele). LISC took the position that in order for the implementation of the OSI model to be successful in sites across the country, it would need to involve these four components, but have some flexibility for each site to develop their own occupational skills programming and be responsive to the community they serve.

[What] worked really well is that, at a national level, we do not try to enforce a consistent model across the board and, even though a lot of times people take issues with that, I think it was the right decision to make. We have sites that have different types of partnerships, for example, with the local community college, and they operate very differently. We decided to take the core elements... so that existing sites, given existing relationships and where they sit in the existing workforce development ecosystem, could take these four elements and integrate it in a way that makes sense for their population and their market context.

– LISC program officer

Bridge programming

As a key component of the OSI model, each site was expected to implement “bridge programs” to address academic readiness gaps among their clients. Bridge programs provide FOC clients with the foundational academic skills they need to qualify for and succeed in middle skills training programs. Crucial for job success, bridge programming is also contextualized, meaning that the curriculum incorporates industry-specific content into basic skills lessons.

While each site successfully implemented a bridge programming component of the OSI model, there were differences in the delivery of bridge instruction across sites. Key themes regarding implementation of the bridge programming component include:

- **Overall, participants were given the academic support and remediation** aimed at improving their math and reading skills to meet requirements to participate in a credential-earning or pre-apprenticeship program.

It helped me with my math a lot because, now as I'm working in construction, I really didn't understand fractions and how to read a tape measure. Now I'm getting more proficient and, as far as the tape measure, I know how to really do that. I'm still working on my fractions, but I know way more than what I did before entering the program. – Program participant

It was a lot of classroom work; construction math, reading...like the fundamentals to put you where you need to be in order to be right at the entry level. – Program participant

- **Some sites provided bridge programming instruction in-house by hired staff and others contracted with outside entities** (i.e., IRC had in-house instructors and SER Metro-Detroit partnered with the City of Detroit's Housing and Revitalization Department). Both strategies were successful and presented unique benefits and challenges for site staff and clients.
- **Most sites administered an assessment (i.e., the Test for Adult Basic Education (TABE) test) to assess individuals' skills and aptitudes in reading, math, and English** in order to develop an individualized plan for each client. This component was noted by many site staff as a beneficial part of the initial program entry process for clients.
- **Several sites experienced challenges with participant recruitment.** Some sites had difficulty identifying appropriate participants for their program. Participants had to meet particular academic requirements, have the ability to commit to the time it takes to complete the program, have the motivation and flexibility to participate, have a network of support, etc.
- **Bridge programming was constantly being improved by the participating sites due to consistent re-evaluation of what was working and where programming needed to be modified.** The team implementing the bridge programming at each site had to be flexible and responsive in order to make changes based on lessons learned throughout the process. During the two-year pilot, each site engaged in an iterative process in the development of their bridge training program to better prepare clients for the industry and jobs they were being trained for. Sites have changed the bridge training classroom hours to accommodate students who hold a part-time job. They found funding sources to subsidize the cost of required extra preparation for challenging courses in occupational training, or reorganized their staffing procedures to increase the amount of time students can meet with their financial coach.

Adjustments to the bridge programming

Adjustments to the bridge programming at each site were most often made to meet the needs of clients and to increase the accessibility of the program and participants' ability to complete it. The types of adjustments made at sites include:

- **Sites added a career assessment process** for each client in order to match them with training in an industry that suits their interests, skills, and lifestyle. This step promotes a more effective use of funds and prevents clients from starting a process that they will not or cannot finish.

They incorporated a career research or investigation component that I thought was really good. So, if the candidate expressed interest in manufacturing, they were required to actually go interview someone in that job and do a brief report on what they learned about that job and why they thought it would be a good job for them. So that was a requirement of the program that they implemented in an effort to better match candidates with occupational training. – LISC program officer

- **Program graduation requirements were adjusted at some sites** depending on the career goals of the client, so that a client does not have to complete unnecessary steps in order to graduate (e.g., it is not necessary for a client to meet requirements to become an electrician if their goal is to become a laborer).
- **In some cases, the bridge curriculum and class time were shortened** and clients were given the flexibility to skip parts of the programming depending on how they scored on their TABE test. (e.g., if clients met the required reading skills, they were not required to attend that part of the class). These are strategies used to increase retention.

Other adjustments were made to make the training more effective and helpful for clients. These adjustments include:

- The credentials offered changed depending on what the industry requires (e.g., offering OSHA 30 instead of OSHA 10).
- Sites hired instructors with professional experience in the industry.
- Sites made a point to communicate to clients that participating in bridge programming is a long-term commitment.

You don't walk in, get trained, and then walk away and never hear from Wesley again. We're going to keep working with you for 3-5 years. Whatever your dreams are, whatever your goals are, we want to help you achieve them. We want to walk with you as you figure them out. – Site staff, Wesley Community Center

- Sites also modified or added content to the bridge program curriculum, a particular course, or changed the timing of components for better flow and retention of information.

Successes and challenges

LISC program officers and site staff discussed some of the successes and challenges of the implementation of the bridge programming component at their sites. The successes and challenges varied by site and there does not appear to be a consistent pattern of successes or challenges across multiple sites. For a summary of the self-reported successes and challenges at each site see Figure 2.

2. Self-reported successes and challenges in implementation of bridge programming

	Successes	Challenges
Instituto del Progreso Latino, Chicago	Acted as the blueprint for bridge programming at other sites. Integration of the bridge programming and financial services.	Integration of the bridge programming and financial services. Each service is housed in a different location.
International Rescue Committee (IRC), San Diego	Provided instruction in-house and, therefore, was able to tweak instruction as needed to fit the needs of clients. Understood their clients and what their challenges and needs are – able to design programming that is responsive.	Implementation of bridge programming for transportation, field service technology, and building trades due to the fact that they were lacking the expertise and curriculum template that they had for other industries (i.e., culinary arts).
Mary Rigg Neighborhood Center, Indianapolis	Provided successful remediation classes.	Partnering with the local township school system to change their adult education program to be more contextualized.
SER Metro-Detroit, Detroit	Positive relationships between instructors and participants. Participants received instruction from experienced, retired construction/union workers.	Identifying residents who met site-specific criteria for entering the bridge programming (i.e., partners required a 10th grade reading and math level, drug-free, etc.) and the high standard for graduating. Competition with high growth of low-paying jobs. Transportation barrier for clients to get to classes.
Wesley Community Center, Houston	Constantly re-evaluated the program and made adjustments. Modified established bridge curriculum to meet client needs. Transitioned to assessing the right fit for the client before the client begins occupational skills training.	During the first cohort they did not have an industry professional delivering the training. Modifying and applying a bridge curriculum (also noted as a success). Tracking OSI data – problems using the database system.

Note. These are topics that came up during the interviews but are not an exhaustive list of all of the possible successes and challenges experienced throughout the process of implementation and are not intended to be used as a comparison across sites.

Lessons for the workforce development field

Based on key findings, successes and challenges, and adjustments made throughout the implementation of the OSI model, there are some key lessons that may be useful to consider when developing and implementing future bridge program components of occupational skills programs. These lessons may also be used to inform the current Bridges to Career Opportunities (BCO) initiative being implemented in 32 FOCs across the country.

LESSONS LEARNED: Bridge programming

Lesson #1: Understand the population served, as this will influence what academic and career pathways are offered. For example, if a site has a large number of non-English speaking clients, offering English language courses may be a priority.

Lesson #2: Meet clients where they are at; provide entry-level opportunities for individuals at any academic level or skill level. The more restrictive and exclusionary the requirements are, the more challenging it is to recruit qualified participants.

Lesson #3: Invite past successful participants to talk about taking bridge classes and their experiences after completing them.

We go and try to reach back out to those who are back at the community center to let them know the process we've been through so they won't give up hope. We try to come back and let them know it's going to take time, but it will work out. A lot of times they just give up, but, whatever you want, you have to work for. It's just part of being patient and knowing that something good is going to come after. – Program participant

In-demand sectors and industry-recognized credentials

OSI pilot sites were required to identify in-demand and high growth job sectors in their city and provide training and career pathways to prepare individuals for middle-skills careers in those sectors. Preparing clients to work in the identified in-demand sectors involved helping them get industry-recognized credentials and certifications. Identifying the needed credentials and certifications involved communicating with potential employers and existing training sites (i.e., colleges, universities).

I think what IRC did really well is they identified within some of our large service sector industries where there are jobs that pay lower wages. And, they've identified pathways that will lead to high paying jobs within those industries. In doing that, they took advantage of relationships with employers. So, I've been pretty impressed with how strategically they drew out those pathways. – LISC program officer

See Figure 3 for information about the academic and career pathways offered at each site, the associated credentials and certifications, and the local workforce climate in each city - as described by LISC program officers and site staff.

3. In-demand sectors by site and local workforce climate

Site name	Industry	Associated credentials and certifications	Local workforce climate
Instituto del Progreso Latino, Chicago	Health Care, Manufacturing, Retail, Information Technology, and Hospitality	NIMS credential (National Institute for Metalworking Skills), CNA (Certified Nurse Assistant), LPN (Licensed Practical Nurse)	Job studies have identified that health care and manufacturing are growing industries across the U.S. CNAs are in high demand in Chicago hospitals.
International Rescue Committee (IRC), San Diego	Culinary Arts, Allied Health, Transportation, Field Service Technician, Building Trades	Food Handler's Card, CAN, CMA (Certified Medical Assistance), Class A or Class B driver's license	Identified industries are booming in San Diego. There are a lot of service sector and hospitality jobs available that do not pay high wages. There is a sizable bio technology and health care technology industry, but they require extensive, specialized training for employment. Targeting middle skills jobs is a challenge in this environment.
Mary Rigg Neighborhood Center, Indianapolis	Health Care, Manufacturing, Logistics/Warehousing, and Human Resources	CNA, medical assistant, pharmacy tech, EMT (Emergency Medical Technician), CMA, QMA (Qualified Medical Assistant), Material Management Certificate	Indianapolis is a huge warehousing hub because of their geographic location in the country. UPS has a major terminal at the airport and a number of trucking terminals around the city. Mary Rigg Neighborhood Center is located near several manufacturing sites. There is also high demand for CNAs in the medical field and Mary Rigg is located near several hospitals and nursing homes.

Notes. These are topics that came up during the interviews but are not an exhaustive list of all of the possible successes and challenges experienced throughout the process of implementation and are not intended to be used as a comparison across sites.

*The OSHA certification provides training for workers and employers on the recognition, avoidance, abatement, and prevention of safety and health hazards in workplaces. The program also provides information regarding workers' rights, employer responsibilities, and how to file a complaint. OSHA 10 includes 10 hours of training and OSHA 30 includes 30 hours of training. This training is contextualized to the construction industry.

3. In-demand sectors by site and local workforce climate (continued)

Site name	Industry	Associated credentials and certifications	Local workforce climate
SER Metro-Detroit, Detroit	Unions - Construction (Electrician, Bricklayer, Carpenter, Laborer, Mason, Iron Worker), Plumbing	OSHA-10*, MUST Safety module (Management and Unions Serving Together), MCRC certification - WorkKeys Assessment, RRP (Renovation, Repair, and Painting)	Due to infrastructure improvement initiatives in the city (i.e., second bridge to Canada, arena, development in downtown and into neighborhoods) and people aging out of the unions, there is a high demand for workers in the construction industry.
Wesley Community Center, Houston	Health care and child care development	CNA, CMA, Medication Aide EKG Technician, Phlebotomy, LPN/LVN (Licensed Vocational Nurse), CPR, CLA (Clinical Lab Assistant), HVAC, CDA (Child Development Associate)	Houston has one of the largest medical centers in the U.S. Additionally, there is a statewide initiative to increase the quality of early education.

Notes. These are topics that came up during the interviews but are not an exhaustive list of all of the possible successes and challenges experienced throughout the process of implementation and are not intended to be used as a comparison across sites.

*The OSHA certification provides training for workers and employers on the recognition, avoidance, abatement, and prevention of safety and health hazards in workplaces. The program also provides information regarding workers' rights, employer responsibilities, and how to file a complaint. OSHA 10 includes 10 hours of training and OSHA 30 includes 30 hours of training. This training is contextualized to the construction industry.

Key themes from interviews regarding the implementation of pathways to in-demand sectors and industry-recognized credentials include:

- Overall, sites were able to successfully connect clients to career opportunities** through contextualized training programs that included site visits and other hands-on, real-world experiences.

[The site visits] were very helpful for me, personally, so I can figure out what trade I wanted to be in and to open my eyes to how many trades there are and what they do. I never knew how to get in. Like elevator constructors. I never knew about that. The only things I really knew about were carpentry, plumbing, electrical, roofing, but it was very specific. But to meet the people and just to see how easy it is to get in. It blew my mind.
 – Program participant

- Each site identified industries and job sectors that are growing rapidly in their city.** Some sites also considered where their office was located and considered their clients' ability to get to a job site when identifying which employers to build relationships with.

For the location and the area we're in right now, I think focusing on construction trade is a good idea. We have construction pretty much non-stop where we live right now and I think definitely Detroit is growing and the Detroit metro area is going to continue to grow.
 – Site staff, SER Metro-Detroit

- **Health care and manufacturing industries were the most commonly targeted industries across sites.** Other industries included construction, hospitality and customer service, retail, information technology, logistics/warehousing, human resources, culinary arts, and child development.
- **OSI funding allowed sites to deepen and expand, as well as develop new relationships with employers and skills training providers.** At several sites, employers were involved in the development and delivery of the job training curriculum, including both technical and soft skills. Instituto del Progreso Latino in Chicago engages employers at a high level by using an industry advisory council, which is a group of employers who convene to provide the FOC with feedback on their occupational skills programming.
- **Sites developed partnerships with a variety of employers and skills training providers.** Partnerships were developed with universities, community colleges, hospitals, unions, private companies, hotels, restaurants, and schools.

Adjustments to focus on in-demand sectors and industry-recognized credentials

Overall, sites were building their academic training to meet the needs of employers and their clients throughout the OSI period. The adjustments made were likely implemented post-OSI implementation, but were highly informed by what was learned during the OSI implementation period.

- Sites expanded training opportunities for additional industries and associated credentials (e.g., adding Child Development Associate certification at Wesley Community Center) based on employer feedback, industry demand, client interest, and internal capacity.

In Houston with Wesley, we only focus on health care through OSI, but once we entered into the BCO phase, Wesley decided to expand to the Child Development Associate. It was a need they recognized by looking at a lot of data within the neighborhood.
 – LISC program officer

- Sites added visits to job sites as part of their occupational skills training to provide clients with real world experiences in each field for which a career pathway is offered.

Employer partnership building

Each site had relationships with employers or unions prior to receiving OSI funding; however, the OSI pilot period pushed sites to deepen their relationships with employers, develop new relationships, and expand career pathways for clients.

EXAMPLES

Deepened relationship with an employer:

- In Houston, Wesley Community Center expanded the size of its Certified Nursing Assistant (CNA) bridge program, and also added a second, post-CNA bridge component through a unique partnership with a major local employer, Methodist Hospital.

New relationships developed with employers:

- In San Diego, IRC developed a new relationship with San Diego State University to bridge participants into postsecondary certification programs in hospitality management and customer service.
- Wesley Community Center in Houston had previously developed a strong relationship with Methodist Hospital and recently started partnering with St. Luke's Hospital to train clients to become PCTs (Patient Care Technicians) in a similar capacity.
- SER Metro-Detroit has a strong relationship with unions, but has started to develop relationships with employers directly as an additional track for their clients. The employers may not hire through the unions and can hire directly. This is beneficial to their clients, as these unions are known to be difficult to penetrate.

The union helps because, if you get into the union, they'll pay for more training and keep you on that escalator, but it's hard to get into the unions. They're not very public on when the applications are due or when their decisions are being made, and each union has a totally different calendar on how you get it. So, as a work around, instead of just focusing on the unions, [SER] has been developing relationships directly with employers.
— LISC program officer

Pathway added due to an employer relationship:

- IRC had a long-time relationship with a Hilton hotel, Hilton del Mar. The hotel frequently hired individuals who came out of IRC's hospitality training program. Those individuals ended up staying with the company for a long time and were often named employee of the month, but hit a ceiling within the organization because they lacked the skills to move up to a supervisory or management position. The hotel asked IRC if they would develop a supervisory training program within the hospitality sector to support their clients in climbing a career ladder within the company.

Successes and challenges

LISC program officers and site staff discussed some of the successes and challenges of building relationships with employers and identifying the best sectors in which to provide bridge programming and occupational skills training for their clients. The successes and challenges varied by site and there does not appear to be a consistent pattern of successes or challenges across multiple sites. For a summary of the self-reported successes and challenges at each site see Figure 4.

4. Self-reported successes and challenges during implementation of in-demand sectors and industry recognized credentials

	Successes	Challenges
Instituto del Progreso Latino, Chicago	Employers from in-demand sectors serve as subject matter experts to inform and improve the curriculum through an industry advisory council. Pathways and credentials are responsive to employer need.	(Insufficient data)
International Rescue Committee (IRC), San Diego	Relationship building with employers. Identified fast-track training opportunities that fit the needs, interests, and capabilities of community members they serve.	Relationship building with employers takes a long time and is time-intensive. Providing funds for training and certifications for clients. It has been a challenge to get clients access to Individualized Training Accounts (ITAs), particularly for non-native English speakers Coordination and complexity of providing all parts of the OSI model. Targeting middle skills job training. Partnership with unions, transportation, and building trades due to socio-political issues and cultural attitudes toward diversity.
Mary Rigg Neighborhood Center, Indianapolis	Use of data to select career tracks.	Early job placements, often resulting from site visits (clients being hired before completing training). Developing relationships with employers due to staff turnover.
SER Metro-Detroit, Detroit	Mentoring – clients had support once they started an apprenticeship. Trust between SER Metro-Detroit and unions/employers. Improved programming by offering field trips and OSHA 30 instead of OSHA 10 training.	Clients passing drug tests.
Wesley Community Center, Houston	Changed from a scholarship program to providing bridge training in-house.	(Insufficient data)

Note. These are topics that came up during the interviews but are not an exhaustive list of all of the possible successes and challenges experienced throughout the process of implementation and are not intended to be used as a comparison across sites.

Lessons for the workforce development field

LESSONS LEARNED: In-demand sectors and industry-recognized credentials

Support career options that have opportunities for professional growth over time. (Houston Case Study report).

Lesson #1: Identify which in-demand sectors are most penetrable for job-seekers and provide opportunities for advancement (e.g., identify hiring cycles, internal hiring processes, unwritten rules clients should be aware of, etc.)

Lesson #2: Identify industries that are best suited to the population served (i.e., if English is a barrier do not choose a career that involves a high level of English language skills, such as customer service positions).

We looked at who we were serving, and what we are attracting are mothers who are already in the schools, just not certified—those are the ones interested in the CDA (Child Development Associate) credential. Or people who work for the YMCA, and they're working with children. They can get paid a little more if they have a CDA certification. – Site staff, Wesley Community Center

To address hiring needs in middle-skills roles, employers must shift to becoming partners in the shaping and support of the talent pipeline rather than simply hiring agents at the end of the pipeline. (Houston Case Study report).

Lesson #3: Engage employers in the development of the program and curriculum to get buy-in and develop a mutually beneficial relationship.

The relationship between Wesley and the hospital is really robust because the hospital makes many changes to allow the pilot program to happen where Wesley clients are paid for the 10-weeks that they do their externship. A lot of that happened because of how we pitched the program. We supported Wesley through the consultant to go out to pitch to employers and we talked about the OSI model. We told them about the idea that the clients coming from Wesley were better prepared and better trained, and they understand the job that they're walking into. – LISC program officer

Lesson #4: Partner with employers and skills training providers that share similar values (e.g., have career advancement and training opportunities, offer good support for new hires).

Clearly-defined academic and career ladder

As part of the implementation of the OSI model, sites were required to articulate clearly-defined academic and career ladders for their program participants. How these academic and career pathways were communicated to participants varied from site to site.

I would say, across the board, when we started OSI, that was probably the weakest part of all of our programs. It's something I've had to work with sites on quite a bit, just to make sure there's a visual that's there. – LISC program officer

LISC program officers and staff at each site were asked to describe the implementation of this component of the model. Key themes regarding the implementation of a clearly-defined academic and career ladder are described below.

- **All sites have a clearly-defined academic and career ladder that is communicated to program participants.** Each site has different and often multiple ways of communicating to clients about the academic and career ladders that correspond to their training programs. Some strategies include: taking potential program participants to tour a local community college where some of the job training takes place, meeting one-on-one with site staff to go over pathways options, providing a visual explaining the potential pathways, providing a handbook, and attending a program orientation that highlights the pathways.
- **Sites work with clients to envision, reach, and achieve their individual academic and career goals and, once achieved, to reach beyond their initial goal.** If a client earns a credential and obtains a job, they are supported by site staff to think about options for further education or growth. Sites are prepared to work with clients for the long term, even after an individual has reached their initial goal. Some clients may ultimately be supported to go beyond what they had originally set out to achieve and continue to further their education or start their own business.
- **Communication about the academic and career ladders was on going and helped participants to think about their long-term career path rather than a single job.**

If it wasn't for them, I think I would still be at another temp job just worrying about the now and not the long term. So, I'm glad she kind of pushed on me, like, "Yeah, you know you can do this and just think about the type you can get certified in." I went in just like, "No, I don't want it, I don't have the time" and my whole attitude just changed from the beginning to now. I'm just truly grateful. I do not think I would have got the job without the certification, because I have absolutely no experience. She really just made me change my focus and my mind set and just thinking about long term versus just the now. – Program participant

- **Visuals, presentations, or handouts that describe the academic and career pathways at each site were sometimes used as a tool to recruit program participants** by describing to participants how they might benefit from participating in bridge programming and occupational skills training.

- **Program participants do not always follow a linear path to obtaining a career/job.**

I mean we are dealing with human beings here, people change, they might go to work in the field they were trained, but, you know, something may have happened; things happen—people leave jobs for a variety of reasons, but I think in terms of the way Mary Rigg set this up and explained the opportunities to people, it was a sound approach, but you know career pathways aren't necessarily linear either. – LISC program officer

- **Participants are reminded throughout the program of their academic and career goals and what the related expectations are.** At Instituto del Progreso Latino, clients are reminded of what their career goal is at every step of the program.

They inform you and let you know that it's not going to be an easy ride. They don't give you false hope. They let you know that...I think there's a saying on the wall, "Only those that stay will be champions." – Program participant

In culinary arts, they start with the bridge training; that includes both basic culinary skills, along with vocabulary that's often used in the kitchen, and as part of that participants also get a Food Handlers Card. The next step in the pathway then is to really get some experience as an entry level chef within a kitchen. And then, after 6 months to a year of work experience, IRC will work with the participants to get additional training. They've got a relationship with a school where they can get a more formal culinary arts credential that is certainly industry-recognized. And then there's the opportunity to go into either a high paying Executive Chef-type position, or they can actually take advantage of the same Customer Service and Supervisory Management Certificate and go into a supervisory position in a kitchen setting.

– LISC program officer

Wesley was able to create a career ladder visual. They probably have a really defined career ladder and what they are able to support at Wesley. Specifically, when clients come in they are able to test at 8th grade level. When they go through the bridge training, they are able to increase to a 9th grade level and that's where they are able to go on to the vocational training at the community college and be able to pass the exam at the end. The exam is the Certified Nurse Assistant (CNA) national exam, and from that the client can become a CNA at a hospital, or a home health care center. Then if they want to increase their skills over time they can come back to Wesley, go in the second bridge which would allow them to get their electrocardiogram (EKG) or phlebotomy so that they can go back to the hospital. So they do have a pretty clear career pathway, academically and also career-wise.

– LISC program officer

If someone is interested in academic growth, we show them and teach what the ladder would be for that particular degree. If someone comes in without a high school diploma, they can't be a CNA, but they can grow. If they have a high school diploma then they can grow within being a CNA, then they can become a Qualified Medical Assistant (QMA), then they can become an OPN or Registered Nurse (RN). So we work with them so that they understand the ladder, so that they go in the right direction. Every different field, every different position, they all have different ladders, we educate them on that. We tell them as much as you can and lead them in the right directions as best as we can. Sometimes life gets in the way and everybody goes at different speed. So some people snap right up that ladder and some people take their time.

– Site staff, Mary Rigg Neighborhood Center

Adjustments

Throughout the OSI period, participating sites developed and refined the academic and career pathways they offered their clients. They also adjusted how they communicate those pathways to ensure that participants fully understand what they are committing to.

- Some sites increased the number of orientations and required that clients attend an orientation (and secured informed commitment from clients) before getting involved in the program.

I think that the screening process or the assessment process before they even enter the program...they are told right up front that they will have to be in the program from this time to this time, so they won't be able to work at the time and just being really up front in terms of what the career pathway looks like, what the potential wages they can make and what the commitment is long term to go through the training. Having that all up front, even before the client enters the classroom, I think is very important to make the client successful.
– LISC program officer

- Sites also adjusted steps along the pathways; adding training and credentialing options to provide clients with the appropriate academic skills and credentials to be hired in the field for which they are trained.

Successes and challenges

LISC program officers and site staff discussed some of the successes and challenges of clearly defining and communicating the academic and career ladders offered through their site. The successes and challenges varied by site and there does not appear to be a consistent pattern of successes or challenges across multiple sites. For a summary of the self-reported successes and challenges at each site see Figure 5.

5. Self-reported successes and challenges in implementation of a clearly defined academic and career ladder

	Successes	Challenges
Instituto del Progreso Latino, Chicago	Articulates the health care career pathway and corresponding academic needs well.	There is a misconception about the skills needed to enter into the manufacturing industry, which requires instructors to provide more information. The majority of the participants in manufacturing training are English-speaking and do not understand the benefit of improving their reading or math skills.
International Rescue Committee (IRC), San Diego	Effectively communicating that the program takes significant time and effort from the client. Using past program participants to testify to potential participants that the pathway has been beneficial to them.	(Insufficient data)
Mary Rigg Neighborhood Center, Indianapolis	Handouts – financial coaches were already doing something similar before the OSI model was implemented, so it was an easy transition to explaining career pathways.	(Insufficient data)
SER Metro-Detroit, Detroit	Created a visual for participants that describes the career ladder.	Describing a clear academic and careers pathway was described as the weakest part of the program. Contrasting perspectives between SER Metro-Detroit and their instruction provider, HRD (Human Resources & Development). SER Metro-Detroit was more flexible and HRD was more rigid/strict in their expectations of program participants.
Wesley Community Center, Houston	Created a visual for participants that describes the career ladder. Used a career pathway similar to the one for health care at Instituto del Progreso Latino.	Many students get stuck at the entry level – life gets in the way. Difficulty providing orientations due to inadequate staffing.

Note. These are topics that came up during the interviews but are not an exhaustive list of all of the possible successes and challenges experienced throughout the process of implementation and are not intended to be used as a comparison across sites.

Lessons for the workforce development field

LESSONS LEARNED: Academic and career pathways

Accurate information and coaching about training and careers helps clients evaluate the investment of time, money, and resources, and the returns they can expect in that career. (*Houston Case Study report*).

Lesson #1: A visual representation of academic and career pathways can be used as an effective recruitment and communications tool. It can be used to explain to potential participants why they should invest their time in a training program instead of taking a low-wage job.

Lesson #2: Clearly communicate the academic and career expectations prior to beginning the training. This can help identify the best candidates for the program - those who are ready or situated appropriately to be successful in bridge programming.

Lesson #3: Remind clients of the various academic and career pathways options and the steps of each pathway. Revisit individual goals with clients along each step of the pathway. Reiterating the pathway can help clients stay on track, focused, and motivated to reach their goals.

Lesson #4: If working with a contractor to provide training, communicate with the contractor to agree on shared expectations of the clients.

Lesson #5: Continue to provide support for clients who are not able to find work despite completing their academic and career training program(s).

Coaching, navigation, and supportive services

As Financial Opportunity Centers, the participating sites already have many supportive services for their clients. Coaching and other supportive services help clients to address barriers that make it difficult for them to commit to longer-term career training programs.

- **Supportive services include financial coaching (e.g., budgeting, credit building, and record expungement), career coaching (e.g., goal setting, career exploration, resume and interview skill-building, soft skills), child care, transportation, financial assistance, and emotional support.** Because an integral part of FOC operations is talking with clients to determine their needs and having the knowledge to connect them with appropriate, available programs, site staff are very intentional in helping participants be prepared to succeed in the program.

The good thing about our program is that we are able to have three coaches: the employment coach, the income support coach, and the financial coach. They are all able to meet with us for all these different pieces. So at the beginning of it, they meet for the employment coaching to talk about their goals, career goals, what they can work on, what the barriers are. From that [the employment coach] can refer the participant to our income support coach, and income support can help them out with applying for food benefits, health insurance, finding supportive services that they can take advantage of right now so they can avoid any financial burdens while they are in the program. I [a financial coach] meet with them during the middle of the program to talk about budgeting, credit report, and banking options, things that they need to go ahead and learn a little bit about before they start getting employed.
– Site staff, SER Metro-Detroit

- **Many participants continue to work with financial coaches after they have completed job training.** Staff at one site felt that there is a greater need for financial coaching services after clients had been working for at least a month or two. At Wesley Community Center, most participants are not employed when they enter the bridge training. Site staff found that participants need additional assistance learning how to budget their new income.
- **Sites provided a combination of one-on-one and group coaching to identify potential barriers and to work with clients to address problems as they arise.** Sometimes participants find the work too challenging, or lose their child care, or hear about a part-time job opportunity and need the extra income, even if it means ending courses that can lead to much better opportunities down the road. The network of coaching staff—training providers, employment coaches, financial coaches, and others—have built relationships with participants to learn about mid-course roadblocks as they occur. They prioritize recognizing and mitigating these potential reasons a client will leave the program with advice and targeted income supports that can help address the issue.

- **Site staff take great lengths to stay in contact with participants after they have graduated from the program.** For many clients, the first choice directly after finishing the OSI program is not continued occupational training. Like most workers who struggle to find a good job, these program participants are eager to find employment and begin to earn a steady paycheck. Because of the relationships and commitment of these FOCs to work with clients over the long term, however, staff keep in touch with graduates, and many eventually return to the career pathway by seeking training and certificates that lead to promotions and a better salary.

They still call to see if you're working. They still do that all the time. And I am working. They always make sure you have a job. – Program participant

Adjustments

During the implementation of the OSI model, sites adapted their coaching and other supports to better meet the needs of clients participating in the bridge programming and to improve integration with the academic skills and job training components of the initiative.

- One site hired more employment specialists to meet the need of program participants and to develop relationships with employers.
- Another site transitioned from allowing participants to meet with coaches ad hoc, to requiring that bridge training participants participate in coaching on a more consistent basis.
- Those sites that ensured meetings with financial coaches at the time of enrollment found benefit in motivating clients during the program.

Successes and challenges

As FOCs, sites offered financial coaching as well as other supportive services before the OSI model was implemented. Site staff and LISC program officers described a variety of successes and challenges related to integration of their coaching and supportive services with the OSI model. The successes and challenges varied by site and there does not appear to be a consistent pattern of successes or challenges across multiple sites. For a summary of the self-reported successes and challenges at each site see Figure 6.

6. Self-reported successes and challenges in implementation of coaching, navigation, and supportive services

	Successes	Challenges
Instituto del Progreso Latino, Chicago	Integration of coaching services among program participants.	Difficulty integrating financial services with job training because these services are located in different buildings. Figuring out how the two programs can work collaboratively. Staff turnover. Making sure all program participants are served by financial coaches.
International Rescue Committee (IRC), San Diego	Having multiple points of contact for clients – more than one person available to answer their questions. Have walk-in hours, so clients do not always have to make an appointment.	(Insufficient data)
Mary Rigg Neighborhood Center, Indianapolis	Providing clients with credit repair and providing basic supports like bus fare, gas cards, or work clothes.	(Insufficient data)
SER Metro-Detroit, Detroit	Financial and career coaching are woven into and embedded in the career pathways training model.	Participant attendance – adhering to expectations and requirements as spelled out in the participant handbook. Need more supportive services related to emotional support. Deeper relationships between instructors and participants than between coaches and participants.
Wesley Community Center, Houston	Development of meaningful relationships between coaches and program participants.	Coaches were in high demand, needed more staff. The transition of working with clients with a little less stability in their lives. Reaching out to clients to get them to come back for financial coaching.

Note. These are topics that came up during the interviews but are not an exhaustive list of all of the possible successes and challenges experienced throughout the process of implementation and are not intended to be used as a comparison across sites.

LESSONS LEARNED: Coaching, navigation, and supportive services

Lesson #1: Incentivize program participants to come back and use supportive services such as financial coaching even after the training is completed.

Lesson #2: Have multiple points of contact. This is one strategy to ameliorate the loss of contact with clients that can occur when there is staff turnover. Long-term and consistent contact can be helpful to the client to keep them on track and engaged in working towards their goals.

Lesson #3: Program participants may benefit from receiving emotional support services. Sites might consider developing a formal position to provide emotional support for clients (e.g., a counselor or therapist), requiring that coaches have a specific set of interpersonal skills, and developing referral relationships with behavioral health providers in their area.

People have anxiety and fears that keep them from working, which we're not being able to address because we're basically hired to be either an instructor or career coach, so you're giving them information, but you're not really getting to the root of why they're not working.
– Site staff, SER Metro-Detroit

Lesson #4: Fully integrate financial coaching services, other supports, and bridge program training. The OSI model is intended to be fully integrated into FOC services, including participants having access to the supportive services available through these organizations. The success of the OSI model is due in large part to clients' access to and engagement in the full suite of FOC services that go beyond what is offered in a traditional occupational training program.

Lesson #5: Offer flexible hours for when clients can receive coaching services.

It was a really good experience. They were really flexible with the time. They stay quite late, so if you can't go in the morning you can catch some in the afternoon. So they are very flexible. If you couldn't make it today, you could go in tomorrow. So pretty flexible with the hours. – Program participant

Additional key elements of OSI implementation

There are several findings and lessons learned for the field of workforce development that fall outside of the four key components that drive the OSI model. These findings and lessons learned are described below.

- **Many bridge training participants developed a meaningful relationship with their bridge instructors or coaches.** Beyond the academic and occupational instruction, across sites, participants felt emotional support from their instructors. Additionally, several program participants quoted motivational words from their instructors or coaches that have stuck with them and made a lasting impression.

[The bridge training instructor] does mentor coaching every day. A matter of fact, he's more than a teacher, he's a mentor, a social worker, and all that wrapped up into one because he knows, and [other staff] know when people come in there that their life is in disarray and their life is turned upside down when they get to SER Metro. They know that people are really going through it. Anything you can think of is there. After hours, during work hours. It's very personal. Financial coaching, resume, cover letter. They still call me to this day. I call them and they call me. To me it's like a long-going, ever friendship. – Program participant

The coaches are extremely nice. We're family. Everyone in the house is family. Even if you go through the door, we know who you are. We try to remember faces and remember names. So it's like a family. Even though we all go through different programs at the Wesley House, we're all like a family. – Program participant

- **For many program participants, providing a stipend** made it possible for them to participate in bridge training because it made it more affordable. Program participants were asked about what they like most about the services they received while in the program. One in four participants said they liked that it was free, they received a scholarship, or that they received a stipend.

Actually when I got there, like I said, I was searching for a job, but I was already working but trying to find a better job. I signed up for the program and they gave us a little stipend for gas and whatever else – they give us a \$50 Visa card and a \$25 gas card every week. It helped me out a lot. – Program participant

Lessons learned for the workforce development field

LESSONS LEARNED: OSI model

Lesson #1: Due to the difficulty of finding appropriate candidates for occupational skills training, sites might consider using marketing techniques to strategically advertise their program to recruit participants that are right for the program.

Lesson #2: Provide compensation (i.e., stipend). In order to recruit participants that might take a low-wage job instead of entering a training program, it is critical that an incentive or stipend is provided. For many participants, a stipend may be the only way for them to afford to participate in the training for the required period of time. Another option is to connect participants to potential part-time work that requires different hours than the bridge training schedule so that they still have an income during the training period.

For one cohort we gave out a stipend on a weekly basis and that seems to be our highest retention cohort. So that makes a big difference. And then for the next cohort we didn't do that and we had low enrollment and low retention for that cohort. When you have individuals in a training program for a long, sustained period of time, not being paid is a big barrier for individuals. – Site staff, SER Metro-Detroit

Not every client is a good fit for every program – create clear parameters for who is most likely to succeed in the training program and who will not. Screening protocols including interviews and thorough intake processes empower staff to provide clients with the services that are the best fit for their needs. (*Houston Case Study report*).

Lesson #3: Assess a client's interests, abilities, and commitment before beginning an occupational skills program. This leads to an effective use of funds and use of the client's time.

That's something that we work on in class. One of the things we all work together and that was a project for us to understand where we are at and where we want to go as long term and short term. It was a really good class for me because I got to understand where I am at and where I want to go – a view of the future. We plan out a vision board. – Program participant

Lesson #4: It is important to have an instructor that understands the industry and has professional experience working in the field. Equally important is having an instructor that can connect with students and provide the encouragement and emotional support that clients have described as a critical contributor to their success.

...as we're doing more of the BCO work in Detroit it really feels like having that connection with that instructor and a healthy back and forth and that instructor pushing people and motivating is just really key to adult education. – LISC program officer

LESSONS LEARNED: OSI model

Professional and technical training is often not enough to move the needle – many clients require a high degree of support, access to resources, and other wraparound services to transition to a place of stability (*Houston Case Study report*).

Lesson #5: Provide support to keep students in class. Make courses as accessible as possible and account, to the extent possible, for barriers in participants' lives. This involves incorporating flexible class schedules and wraparound services, such as child care, income support, transportation support, etc.

It can't be a really rigid model because you need partners, you need lots of partners and you need lots of students, so you can't really just have a one prescribed method for each person. We need to be flexible, we have evening hours, we have different programming hours, we have classes on site at the center, we have classes off site, so we just try to do-- maximize our class time and how many people we could reach, and I think being flexible really helped that process. – Site staff, Mary Rigg Neighborhood Center

To tell you the God's honest truth, the counselor that I was under was there for anything you needed. Whether it was you just needed to talk for a minute, she was there. – Program participant

Services to meet the needs of parents

Parents face unique barriers to participating in occupational skills training programs. Although none of the participating sites' career pathways programs were explicitly targeted to parents, several sites offer child care services and flexible scheduling to meet the needs of participants with families. Two sites (Instituto del Progreso Latino and Wesley Community Center) even had spots in their in-house day care center for parents who participated in the OSI program. Another site (Mary Rigg Neighborhood Center) had access to a day care program offered through Head Start that was available to program participants if they met the qualifications. All sites had services and coaches to help parents access public benefits (e.g., TANF (Temporary Assistance for Needy Families), SNAP (Supplemental Nutrition Assistance Program), utilities, healthcare access) or get connected to other child care supports or affordable child care centers.

Wesley Community Center added an additional career pathway partway through the implementation of the OSI model that was targeted toward parents, because they had a lot of participants who were mothers with young children. The Child Development Associate (CDA) Credential is the most widely recognized credential in early childhood education. CDAs can be daycare or preschool teachers, teacher’s assistants, or nannies. Working in child care or education settings allows parents to be on a similar schedule as their children, and is, therefore, a career pathway that many participating mothers expressed an interest in.

At Wesley we’re really committed to that idea that we have to be working with family, kids, and parents. The whole package. So we’ve been very intentional about doing that, as well as the career pathways we chose. Part of why we expanded into education is because we know a lot of the clients who come in the door at Wesley into the FOC are moms. And often they have young children. And education is a very good career field for them. They like having the same vacation as their kids. Sometimes they’re able to take their kids with them to their job and enroll their kids at their program if they’re working in an early childhood center. The hours are more convenient. It works a lot better for a lot of our families. That career pathway we actually intentionally chose because we have so many parents in our program. – Site staff, Wesley Community Center

LISC program officers at two of the five sites commented on recognizing the whole person and the family as part of the FOC’s value and mission; providing services that address multiple needs for an individual, including income support, health care, and public benefits like SNAP (Supplemental Nutrition Assistance Program). Additionally, interviewees from all sites talked about their willingness to be flexible for parents and working with participants in order to make the program accessible for individuals with many responsibilities and obligations.

The Culinary Arts Program, for example, you know, they didn’t run the programming five days a week from 8-5 or 8-noon or something like that. Rather, they would schedule it two or three days a week, you know, recognizing that their participants would need other days either for work or other obligations. – LISC program officer

Involvement in local/regional policy

All sites are connected to their local workforce development board and four sites are receiving WIOA (Workforce Innovation and Opportunity Act) funds. Some are involved in policy efforts through participation in local partnerships and collaboratives. Others attend conferences and participate in advocacy at the state capitol. More information about each site’s involvement in policy is described below.

SER Metro-Detroit: SER Metro-Detroit was described by their LISC program officer as “very active within the local workforce board.” In 2015, SER Metro-Detroit was granted the One Stop Case Management & Related Services Contract by the Detroit Employment Solutions Corporation and has been involved in policy work related to One Stop Centers.

IRC: IRC is part of and receives WIOA grants through their local workforce development board. They also participate in local conferences put on by the workforce development board called San Diego Workforce Partnership. They have visited the state capitol to talk about the needs of their participants and how programs should be designed to meet those needs. They have also developed a partnership with the San Diego Housing Commission and have partnerships with local banks and research initiatives in the community around workforce development.

Instituto del Progreso Latino: (Insufficient data)

Mary Rigg Neighborhood Center: Mary Rigg participates in a convening of coaches and managers across their network called Local Community of Practice. They have contracts with their local workforce development board, participate in conferences and panel discussions, and host town hall meetings to discuss workforce development in the region.

Wesley Community Center: Wesley is connected to their workforce development board, but is not currently receiving WIOA funds. They also are involved in an initiative called Upskill Houston, started by the Greater Houston Partnership that was developed, in part, to influence policy related to workforce development. As part of this initiative, Wesley led conversations with all FOCs in the Houston area to talk about what is working and best practices in workforce development. They are also involved in LISC's Go Neighborhoods, which is a multiyear place-based initiative to revitalize Houston communities. Additionally, they have advocated for regulations to payday lending practices and are a part of United Way's workforce development group.

Support from Local and National LISC

Support from National LISC to LISC program officers

The most valuable support that LISC program officers received from National LISC was the opportunity for peer learning, via meeting with other LISC program officers and staff from other sites that were implementing the OSI model through phone calls, conferences, webinars, and site visits.

I think what was particularly important were a number of mini-conferences and meetings that were hosted where we got the different sites together and the program officers got to attend, as well to see some of the OSI sites in action in Chicago. I found that really, really valuable. – LISC program officer

We also did some calls. So the cities that were involved in the project, the program officers like me and my colleagues in other cities who are doing this, did a number of calls together, which was coordinate by national to exchange ideas and talk about progress we were making or challenges. I found those calls to be very useful. – LISC program officer

Other support that LISC program officers found to be valuable included a site visit and one-to-one coaching from Dr. Ricardo Estrada from Instituto del Progreso Latino. Additionally, some LISC program officers were able to visit Instituto del Progreso Latino in Chicago for a two-day training about how to implement the OSI model. Other supports used by LISC program officers included webinars and resources on best practices for developing occupational skills programming, which was also developed by Instituto del Progreso Latino.

Support from National and Local LISC to sites

Support from LISC program officers

Several site staff talked about the support they received from their LISC program officers to use the data system (Efforts To Outcomes, or ETO) to track their clients. During the interviews for this evaluation, sites were in the middle of transitioning to a different database system to track their clients and have also relied on their LISC program officers to support that transition.

Individuals at two sites talked about having received training on how to be a financial coach. Most frequently mentioned was the support sites received via regular check-ins with their LISC program officers through phone calls and site visits. If they had a question, they were able to reach their program officer for guidance and technical support.

Our program officer is amazing. She is always hands-on. We can reach out to her any time we need her or ask any kind of questions. She's definitely supportive. She comes in and does site visits and lets us know if we're on track or not. She's very helpful. She's always available for technical assistance. – Site staff, SER Metro-Detroit

One site appreciated that their LISC program officer had attended some of their graduation ceremonies. Another LISC program officer connected their site to curriculum used at Instituto del Progreso Latino and also helped to convene employer advisory councils for the FOCs working in different sectors in the area.

Support from National LISC

One site staff person appreciated the flexibility of the OSI model and thought it was valuable that sites had the autonomy to do their own hiring for instructors and to develop programming in a way that made sense for their clients and their organization.

They've given us the liberty to structure how long the classes were going to be, how many days a week we're going to offer...and I appreciate that. I know Wesley appreciates it. Because it helps you own it, you know what I'm saying? Versus somebody dropping off their baby and saying babysit. We own it. Because we're the ones that are putting in the labor. – Site staff, Wesley Community Center

Other sites talked about the resources that national LISC was able to connect them to, such as Instituto del Progreso and national LISC conferences.

Issues to consider

Overall, this study sheds some light on how the key components of the Occupational Skills Initiative (OSI) model were implemented across five of the seven pilot sites that were funded by LISC through a grant from the W. K. Kellogg Foundation. The key components are: bridge training, identification of in-demand sectors and industry-recognized credentials, clearly-defined academic and career pathways, and coaching and supportive services.

While four critical components were present at each FOC, it is clear from the interviews that much of the success of the implementation of the OSI model was due to the flexibility in the way sites were able to implement and integrate these components into their existing services. Some of this need for flexibility is due to differences in the local economies (both on the employer side and on the labor force side) in which these sites are operating, and other differences may be due to how the OSI pilot program was layered on top of existing programs and relationships these sites had in place.

In terms of bridge programming needed to help participants prepare for their occupational skills training program, all sites had implemented these services. There may be a need to further clarify the program entry requirements (e.g., can someone enter if they have a 4th grade reading level, or do they need to be at a minimum of 8th grade reading?) and to determine what the ideal requirements should be or what the “sweet spot” is, depending on the types of clients an FOC attracts and the workforce context in that area. It may also be useful to do more evaluation of participant outcomes in the context of their skills at program entry. Sites also need to be clear about what academic skills are needed upon entry into the occupational skills training program; it is not clear from our interviews the extent to which this is clear to sites and the extent to which this is documented for participants as a part of the full academic and career pathway. Then, each site should assess the degree to which their bridge programming adequately addresses the actual skill gap of their participants between where they are at upon program entry and where they need to be upon successful admittance and completion of the selected occupational skills program.

Relatedly, it might be useful for LISC, or the participating FOCs, to identify or develop a “career advancement readiness” assessment that is not specific to any one industry or career, but rather one that addresses things like attitude, motivation, persistence, soft skills, barriers to program participation and employment, opportunities or special skills to build on, etc. This could be used as a part of the enrollment process to assess if a participant is ready for this type of program.

All of the five participating FOC sites we interviewed had identified in-demand sectors in their local areas. These sites used their existing and newly formed relationships with employers and training providers to be sure that industry-recognized credentials were a focus of the occupational skills training offered. One key strategy some sites used to ensure their training program would meet employer needs was to seek feedback from local employers on their curriculum, and then change the curriculum to meet the local employers' needs. Some interview respondents noted that it is important for the FOC sites to establish common values with the employers with which they intend to work. For example, sites may want to specifically engage with employers that share values about paying workers a living wage and offering certain benefits to their employees such as paid time off, etc.

It appears that all of the sites had defined academic and career pathways, although they found various methods for communicating to their participants about these pathways. It appears that repeated exposure to the pathways and the steps in those pathways is critical. Introducing potential participants to the pathways prior to program enrollment to be sure they understand what they are signing up for and to garner their informed commitment to complete the program was important. And it was also important for sites to remind participants of the pathways throughout the program to help maintain their motivation and persistence in the face of barriers and more immediate opportunities. Using the pathways also helped staff and program participants to celebrate and recognize the accomplishment of shorter-term goals, but also to always keep the longer-term goals in sight. Lastly, although the pathways may appear linear on paper it is important to recognize that it does not happen that way in real life, and to find ways to support participants who do not take a linear path to career advancement.

In addition, it may be useful for LISC and the participating sites to conduct further evaluation to better understand at which points in the program participants tend to struggle, fall backwards, or drop out completely. It may be helpful to examine program supports to see if additional resources could be applied at those pressure points and/or to remind participants of their chosen academic and career pathway during times that we can anticipate might be likely points of stress or struggle for them.

When we specifically addressed the needs of parents in these occupational skills training programs, we found that some sites have added or expanded career pathways that are in fields that are more accommodating of parenting demands and conducive to family life.

In terms of the coaching and supportive services provided to program participants, again it appears as if all of the five sites we interviewed incorporated this component of the OSI model. Some sites recognized the need to reintroduce financial coaching after participants have been in the program for a while and have had a chance to earn some money that they can use to budget and plan. LISC might consider if an overall “scope and sequence”, in

terms of the various coaching components (and possibly the other program components as well) of the OSI model as a tool, could be useful for the Bridges to Career Opportunities (BCO) sites and the workforce development field as a whole.

Going forward, in an effort to increase the proportion of participants who obtain jobs in their selected field over the long-term, LISC and the participating FOCs should work to employ more effective practices among employers; change hiring practices, revise employment policies, provide more supervisor training, and otherwise address organizational practices and culture to make their workplaces more welcoming for program participants and other employees like them.

Although all of the five sites we interviewed indicated that they are engaged in local policy discussions or groups, the specific policy agendas were not clear in most cases. There may be an opportunity for LISC to provide additional guidance or support to FOCs in developing local public policy agendas that align with the occupational skills programs and workforce development models used by these sites.

In general, it appears that across the four program components, the relationships between program participants and program staff (coaches, instructors, etc.) were critical. This includes staff who: know the industry/field, are supportive and really understand where the participants are coming from and the challenges they are facing, and set clear expectations for program participation and long-term goal setting and attainment. All of the sites appear to use a fairly high-engagement model where the program staff maintain frequent contact with participants for the duration of the program and, in many cases, after completion. This level of support was needed and welcomed by the program participants we interviewed. However, in some cases, participants' behavioral health needs may not be addressed under the current model, which likely affects program retention and completion, as well as subsequent successful employment. LISC and the participating FOCs might consider finding better ways of supporting the emotional health of program participants, as well as addressing any underlying mental health issues that could compromise program success. Strategies might include training for staff who are providing informal emotional support, in addition to their usual role, or hiring an additional staff person with the specific role of meeting with participants to talk about their mental health. Finally, the program participants and staff all acknowledged the importance of providing financial stipends for participation. LISC should continue to help fund program models that use direct cash incentives and other assistance (e.g., transportation, uniforms/tools, and tuition reimbursement) to support families in program participation and progress toward their goal attainment.

In conclusion, this process evaluation highlights how the four key components of the OSI pilot model were implemented across five sites. The results point to several key areas where LISC and the participating FOCs (which now also includes all of the BCO sites) could work together to tighten the model or to add or modify services to better address participants' needs. This study also highlights ways in which LISC and the participating FOCs are addressing workforce development from a public policy angle and some of the things that could be done to tighten this approach, if desired. Due to the lack of availability of data on long-term outcomes like job attainment, career advancement, and wage increase, the impact of this initiative on individuals' financial stability and occupational skill-building and advancement is presently unclear. According to interviews with site staff and participants, however, it appears that the sites that participated in the OSI pilot had a positive impact on many program participants. It is worth noting that both program participants and site staff felt that this was an impactful model with the power to change, for the better, the long-term outcomes and wage-earning potential of those who participate. More time is needed to fully evaluate and understand the impact of the program; in the meantime, some of the suggestions and ideas provided here may be helpful as LISC and the participating FOCs continue to refine this model of occupational skills training.

I would like to say that I'm very thankful for the program. That program has helped me financially and I can do a lot more for my family. I was not making much really, not at all, but right now I'm making almost 3 times the income that I was making before the program. So I'm very thankful for that program. – Program participant

Appendix

LISC program officer interview protocol

Site staff interview protocol

Program participant interview protocol

LISC program officer interview protocol

Hello, my name is [interviewer name], and I'm a research assistant at Wilder Research in St. Paul, MN. We are working with LISC on a process evaluation of your Occupational Skills Initiative, or OSI. As you know, LISC is hoping to learn more about how the OSI model was implemented within five community-based organizations (CBOs) over the two-year period April 2015 to March 2017, and [site name] is one of these sites.

AS NEEDED: OSI was a piloted precursor to LISC's Bridges to Career Opportunities initiative. Through a Kellogg Foundation grant, LISC provided funding and technical assistance to Financial Opportunity Center partners, seeking to develop and expand career pathways initiatives in Houston, San Diego, Indianapolis, Chicago, Detroit, and the Twin Cities.

We wanted to talk with you today, as the Program Officer from [city] at LISC who works with [site name], to gain a better understanding of what has occurred in terms of the OSI model implementation. We are also conducting interviews with program staff and clients at the five participating sites.

Our understanding is that the findings from these interviews will be used as a learning and management tool for LISC's Family Income & Wealth Building team to better develop and implement programs, partnerships, and opportunities for the communities served by LISC and its partners. The findings will also be shared with the field to improve the design and implementation of bridge and career pathways programming. The information you provide during this interview will be summarized in an evaluation report along with the other data and information we are gathering. The report will be completed in August 2017.

We will list your name along with the other people we interview in the final report, but we will not connect your name with any of the information you provide; all quotes and data used in the report will not be connected to names. I would like to record this interview to make sure that I capture all of your feedback. The recording will be used as a back-up to my notes in case I miss something, and it will not be shared with anyone outside of our research team. Once we have completed the notes, the recording will be destroyed. Is it okay if I record this conversation?

Do you have any questions before we begin?

1. What has been your role as a Program Officer in the development and implementation of the OSI model at [site]? Please briefly describe the program at [site].

2. What do you feel [site] did really well during the implementation of the OSI model?
(PROBE: What do you view as successes, accomplishments, or things that you personally feel proud of as part of the implementation of the OSI model at [site]?)
3. What were the biggest challenges in developing and implementing the OSI model?
What could have been improved upon at [site] during the implementation?

The OSI model incorporates four components that are believed to be essential to a clients' success. These components include, first, a "bridge program" to address academic readiness gaps with contextualized adult basic education; second, a focus on in-demand sectors and industry-recognized credentials; third, a clearly-defined academic and career ladder; and fourth, coaching, navigation, and supportive services. The following questions ask about the extent to which [site] implemented these four elements in their programming.

1. Regarding bridge programming to address academic readiness gaps with contextualized adult basic education, did [site] implement this aspect of the model? (Y/N)
 - a. Please describe the implementation of this component. How did it go?
 - b. How did [site] make changes over time (if at all), and, if yes, why were those changes made?
2. Regarding the focus on in-demand sectors and industry-recognized credentials, did [site] implement this aspect of the model? (Y/N)
 - a. Please describe the implementation of this component. How did it go?
 - b. How did [site] make changes over time (if at all), and, if yes, why were those changes made?
3. What sectors or industries were targeted for OSI training, and how do you feel this impacted program implementation and/or outcomes? Did [site] end up changing sectors and why?
4. Please describe [site]'s relationship and engagement with employers. How has [site]'s relationship with employers changed throughout the implementation of the OSI model?
5. Regarding having a clearly-defined academic and career ladder, did [site] implement this aspect of the model? (Y/N)
 - a. Please describe the implementation of this component. How did it go?

- b. How did [site] make changes over time (if at all), and, if yes, why were those changes made?
- 6. Regarding coaching, navigation, and supportive services, do you feel [site] was able to integrate OSI services with their existing Financial Opportunity Center services? (Y/N)
 - a. Please describe the implementation of this component. How did it go?
 - b. How did [site] make changes over time (if at all), and, if yes, why were those changes made?
- 7. In regards to communicating with clients about program expectations (i.e. steps of the career pathway, or expected outcomes upon completion), what worked and what didn't work?

These next questions are about the implementation of the OSI model at [site] overall...

- 8. What kinds of support did you get from National LISC as a local Program Officer?
- 9. What kind of support do you wish you had received from National LISC?
- 10. What are key things you wish you had known about supporting a site to implement a model like the OSI model?
- 11. In what ways, if any, has [site] tailored its services to meet the specific needs of parents at [site] who participate in the bridge program? (*PROBE: Were there any modifications or supplements that were made to the OSI model to meet the needs of parents participating in the bridge program?*) At any point did [site] identify and add additional career pathways to the OSI model to expand options for parents in [site]'s program? If so, please describe.
- 12. To what extent has [site] participated in local/regional policy discussions to influence a greater focus on job seekers with significant barriers and financial coaching? (*PROBE: Has [site] had any involvement in WIOA planning and implementation and local or state levels?*)
- 13. Is there anything else you would like to share about the implementation of the OSI model at [site] that we did not cover in the previous questions?

Thank you for your time today. Your input is greatly appreciated. Wilder and LISC will share back a draft of the report with you in August.

Site staff interview protocol

Hello, my name is [interviewer name], and I'm a research assistant at Wilder Research in St. Paul, MN. We are working with LISC (AS NEEDED: Local Initiatives Support Corporation) on a process evaluation of their Occupational Skills Initiative, or OSI. LISC's Family Income & Wealth Building team wants to learn about how the OSI model has been implemented in participating partner sites over the two-year period from April 2015 to March 2017. [Site name] is one of five sites that was asked to participate in this evaluation. OSI was a piloted precursor to LISC's Bridges to Career Opportunities initiative. Through a grant from the Kellogg Foundation LISC provided funding and technical assistance to Financial Opportunity Center partners, like your organization, in Houston, San Diego, Indianapolis, Chicago, Detroit, and the Twin Cities, that are seeking to develop and expand career pathways initiatives that fit within the OSI model.

We want to interview you and other program staff and participants at your organization, as well as program staff and participants at the other sites, to gain a better understanding of how the OSI model looks at each site. [Site name] will receive a stipend of \$1,000 to recognize the time and effort spent on this evaluation process.

The findings from these interviews will be used as a learning and management tool for LISC's Family Income & Wealth Building team to better develop and implement the Occupational Skills Initiative or Bridges to Career Opportunities and other programs, partnerships, and opportunities for the communities served by LISC and its partners. The purpose is NOT to judge your organization. The findings will also be shared with the field to improve the design and implementation of bridge and career pathways programming. To this end, LISC is interested in hearing your candid and honest feedback about the implementation process of the OSI model. The feedback you provide will be summarized along with the other data and information we are gathering in an evaluation report.

If there is a question that you feel uncomfortable answering, we can skip it. This interview is voluntary and confidential. We will never link your name to any of the information you provide. However, I would like to record this interview to make sure that I capture all of your responses. The recording will be used as a back-up to my notes in case I miss something, and it will not be shared with anyone outside of our research team. Once we have completed our report, we will destroy the recording. Is it okay if I record this conversation?

Do you have any questions before we begin?

1. Please describe your role at [site]. Specifically, what has been your role in the implementation of the Occupational Skills Initiative (OSI) at [site]?

2. What do you feel [site] did really well during the implementation of the OSI model?
(PROBE: What do you view as successes, accomplishments, or things that you personally feel proud of as part of the implementation of the OSI model at [site]?)
3. What were the biggest challenges in developing and implementing the OSI model?
What could have been improved upon at [site] during the implementation?

The OSI model incorporates four components that are believed to be essential to a clients' success. These components include, first, a "bridge program" to address academic readiness gaps with contextualized adult basic education; second, a focus on in-demand sectors and industry-recognized credentials; third, a clearly-defined academic and career ladder; and fourth, coaching, navigation, and supportive services. The following questions ask about the extent to which [site] implemented these four elements in their programming.

4. Regarding bridge programming to address academic readiness gaps with contextualized adult basic education, did [site] implement this aspect of the model? (Y/N)
 - a. Please describe the implementation of this component. How did it go?
 - b. How did [site] make changes over time (if at all), and, if yes, why were those changes made?
5. Regarding the focus on in-demand sectors and industry-recognized credentials, did [site] implement this aspect of the model? (Y/N)
 - a. Please describe the implementation of this component. How did it go?
 - b. How did [site] make changes over time (if at all), and, if yes, why were those changes made?
6. What sectors or industries were targeted for OSI training, and how do you feel this impacted program implementation and/or outcomes? Did [site] end up changing sectors and why?
7. Please describe [site]'s relationship and engagement with employers. How has [site]'s relationship with employers changed throughout the implementation of the OSI model?

8. Regarding having a clearly-defined academic and career ladder, did [site] implement this aspect of the model? (Y/N)
 - a. Please describe the implementation of this component. How did it go?
 - b. How did [site] make changes over time (if at all), and, if yes, why were those changes made?
9. Regarding coaching, navigation, and supportive services, do you feel [site] was able to integrate OSI services with their existing Financial Opportunity Center services? (Y/N)
 - a. Please describe the implementation of this component. How did it go?
 - b. How did [site] make changes over time (if at all), and, if yes, why were those changes made?
10. In regards to communicating with clients about program expectations (i.e. steps of the career pathway, or expected outcomes upon completion), what worked and what didn't work?

These next questions are about the implementation of the OSI model at [site] overall.

11. What kinds of support did you get from your LISC Program Officer?
12. What kind of support do you wish you had received from your LISC Program Officer?
13. Technical assistance or trainings from National LISC vary by region. What kind of support or technical assistance, if any, did [site] get from National LISC (not from your Program Officer)? (Examples might include specific trainings or technical assistance visits, use of data systems (ETO), in-person Financial Coaching or Client Flow trainings, webinars, site visits, etc.)?
14. What kind of support or technical assistance do you wish you had received from National LISC?
15. In what ways, if any, has [site] tailored its services to meet the specific needs of parents at [site] who participate in the bridge program? (*PROBE: Were there any modifications or supplements that were made to the OSI model to meet the needs of parents participating in the bridge program?*) At any point did [site] identify and add additional career pathways to the OSI model to expand options for parents in [site]'s program? If so, please describe.

16. To what extent has [site] participated in local/regional policy discussions to influence a greater focus on job seekers with significant barriers and financial coaching?
(*PROBE: Has [site] had any involvement in WIOA planning and implementation and local or state levels?*)

17. Is there anything else you would like to share about the implementation of the OSI model at [site] that we did not cover in the previous questions?

Thank you for your time today. Your input is greatly appreciated. Wilder and LISC will share back a draft of the report with you in August.

Program participant interview protocol

Hello, my name is [interviewer name], and I'm a research assistant at Wilder Research in St. Paul, MN. Wilder Research is working with LISC (Local Initiatives Support Corporation) to evaluate a program called the Occupational Skills Initiative, or OSI. [Site] was given funding to provide training programs that teach individuals the skills needed for a specific job and to help them move up the career ladder. These programs were provided over a two-year period from April 2015 to March 2017 at [site].

LISC is working with Wilder Research to gather information through interviews with program staff and program participants at each participating site to learn about your experiences with this program.

This study will help LISC to better develop and implement programs, partnerships, and opportunities for communities around the U.S. We hope you will share open and honest feedback about your experience with the services provided through [site]. You will receive a \$50 gift card to thank you for your time.

This interview is voluntary and confidential. Your decision whether or not to participate and your answers to the questions will not affect any services you receive from [site] or any other project partner. If there is a question that you feel uncomfortable answering, let me know and we can skip it. I do want to make sure that I capture your responses accurately. Is it okay if I record this conversation? The recording will be deleted after it is transcribed into written notes.

Do you have any questions before we begin?

1. What initially brought you to seek services from [site]?
2. What types of services did you receive from [site] in the past two years?
3. What did you like about the services provided by [site]?

4. What did you not like about the services provided? (*PROBE: What do you think could be improved?*)
5. Did training at [site] help you improve math or reading abilities? Was taking (and/or passing) math or reading tests required to move forward with training activities?
6. Did you receive coaching services? If yes, what type of coaching did you receive (i.e., create a budget, check credit, career coaching, goal setting)? (*PROBE: What was helpful about the coaching you received? What was not helpful?*)
7. Did you earn a basic certification or credential to help you get a better job? (i.e., did you get a certificate or become certified in anything through training at [site]?)
8. Do you feel like the program helped you ‘get ahead’ or ‘accomplish goals’? If yes, how so?
9. What was your job search process like after participating in the program? If you are currently working, did participating in the program at [site] help you get that job?
10. What are some barriers or challenges you have faced in trying to get a better job after participating in the program at [site]?
11. Were there services provided by [site] that helped you get a job that provides for you and your family? If so, what were they? Did [site] connect you to a specific employer?
- 12. [Only for respondents who are currently employed]** Do you still meet with anyone at [site] now that you are working?
- 13. [Only unemployed respondents]** Are you continuing to receive training or support from [site]?
14. Is there anything else you would like to share about the services you received from [site name] and how it relates to your career growth and financial stability that we did not cover in the previous questions?

Thank you for your time today. The \$50 Visa gift card will be sent to [site] the first week in July. Someone from [site] will contact you to let you know when they have arrived. At that point you can pick go to [site] to pick it up. When the final report is completed in August, LISC will send you an electronic copy of the evaluation report.