



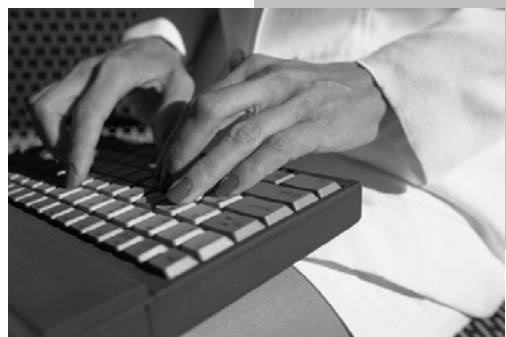
Expanding Opportunities for Businesses and Workers

Promising Practices for
Workforce
Intermediary Initiatives

WORKING PAPER

By
Sarah Looney
Christopher T. King

Ray Marshall Center for the Study of
Human Resources
Lyndon B. Johnson School of Public
Affairs
University of Texas at Austin
512-471-7891
<http://www.utexas.edu/research/cshr/>



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FORWARD

In July 2004, a group of key stakeholders came together in Austin to meet with representatives of the Rockefeller Foundation, the Ford Foundation, and Jobs for the Future. In collaboration with the Annie E. Casey Foundation, Rockefeller and Ford are interested in promoting the growth of local "workforce intermediaries" – organizations with a dual-customer focus on employers and workers that create pathways for disadvantaged and other underemployed persons into career opportunities in demand. Their trip to Austin was prompted in large part by their interest in the potential of two Central Texas nonprofit organizations, Capital IDEA and Capital Area Training Foundation (CATF), to play broader and deeper intermediary roles in the Central Texas workforce system.

Following a successful meeting, CATF and Capital IDEA worked with the Ray Marshall Center for the Study of Human Resources at the Lyndon B. Johnson School of Public Affairs at The University of Texas at Austin to develop a proposal for a collaborative Central Texas Workforce Intermediary Initiative. The funders agreed to provide a planning grant to support the development of a "design and funding plan for a uniquely Central Texas workforce intermediary initiative, based in its own set of institutions, traditions, and context."

This grant represents an exciting opportunity to highlight and expand Central Texas' status as a region at the forefront of the workforce intermediary movement. This paper is the first step in this process. Researchers from the Ray Marshall Center culled information from research literature, conversations with leaders in the field, and their own research experience in this area to compile a brief report describing the characteristics, challenges, and best practices associated with successful workforce intermediary initiatives. We hope this paper will help inform the Central Texas community about the work of intermediaries and the potential benefits of expanding intermediary activity in our region.

Central Texas Workforce Intermediary Initiative

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INTRODUCTION



In today's economy, workers with limited education and work experience struggle to find jobs that provide sufficient wages, benefits, stability, and opportunities for growth and advancement. At the same time, businesses find it difficult to recruit and retain the skilled workers they need to achieve maximum productivity. Workforce intermediaries emerged in response to these needs. Intermediaries bridge the gap by helping businesses identify, develop, and support their employees while at the same time assisting jobseekers in

obtaining the training and supports they need to develop successful careers. They address three key problems facing jobseekers and employers:

1. Many full-time workers in low-wage jobs are unable to earn enough money to lift their families out of poverty;
2. Most workforce development programs focus on initial job placements and pay little attention to strategies for advancement; and
3. The U.S. workforce development system does too little to understand and meet the needs of employers.¹

The roots of these three problems are multi-faceted:

- A variety of structural shifts since the mid-1970s - including deregulation, increased international trade, declines in union membership, slower productivity growth, and the continuing shift to a service economy - have led to the breakdown of internal career paths in U.S. companies.²
- The U.S. economy fails to produce a sufficient number of entry-level jobs that provide opportunities for advancement.³
- Low-income jobseekers face a variety of daunting personal barriers such as limited education and work experience, difficulty securing child care, and a lack of reliable transportation.⁴

¹ JFF, *Workforce Intermediaries and Their Roles*, pp. 4-5

² Kazis, *New Labor Market Intermediaries*, pp. 2-3; Osterman, *Labor Market Intermediaries*, pp. 156-157

³ Fitzgerald, *Community Colleges as LMI's*, p. 4

- Job security has weakened.⁵ Increasingly, responsibility for career development and navigation has shifted from public initiatives to individuals and families who are often unprepared to manage it.
- Employers – sometimes unintentionally – allow their biases against people of color, welfare leavers, and others to effect their hiring decisions.⁶
- Employers are more willing to hire and train workers with a demonstrated capacity for learning (i.e., those who have completed more years of schooling), creating a disadvantage for the least-skilled and least-experienced workers.⁷

Despite these issues – and the recent economic downturn and sluggish recovery, which have compounded some of their effects – it is clear that there is still a strong demand for workers in Central Texas and across the nation in many if not all sectors. Recruiting and retaining skilled workers are consistently identified as two of the top human resources priorities for employers.⁸ Likewise, jobseekers in Austin and elsewhere are eager to secure quality jobs. From 2003-2004, CATF and Capital IDEA served more than 1,000 Central Texas jobseekers and worked with over 400 employers in key sectors such as health care, accounting, construction, and information technology. Additionally, more than 25,000 Central Texas young people took advantage of career exploration programs offered by CATF.

The work of intermediaries

The structure and activities of workforce intermediaries vary. Intermediaries distinguish themselves among the larger field of labor market intermediaries:

- Through their dual-customer (i.e., business, workers) focus;
- By coordinating services that go beyond job-matching to enhance the capacity of both workers and employers;
- By integrating funding streams, services, and information services;
- By generating ideas and innovative approaches to respond to the needs of employers and workers; and

⁴ Poppe, Strawn, and Martinson, *Whose Job Is It?*, p. 63

⁵ Osterman, *Labor Market Intermediaries*, pp. 158-159

⁶ Laufer and Winship, *Perception vs. Reality*, pp. 220-228

⁷ Lynch, *Labor Market Intermediaries*, p. 2

⁸ Mills and Prince, *Employer-Led Organizations and Career Ladders*, p. 3

- By serving a variety of functions, unlike single purpose organizations such as stand-alone training programs or policy advocacy groups.⁹

Major goals of the workforce intermediary movement include expanding the reach of local workforce development systems to serve more employers and workers, developing innovative policies, improving coordination and decreasing duplication, and promoting promising practices. The literature indicates that intermediaries engage in four major areas of activity:¹⁰

- **Engaging key stakeholders and resources:** Recruiting business and jobseeker customers, winning the support of community leaders, forging partnerships, and securing additional workforce development funding.
- **Providing and brokering services:** Intermediaries and their partners provide a comprehensive array of services to employers and jobseekers including job training, technical assistance to employers, and work supports.
- **Promoting improved policies:** Ensuring that public policies at the regional, state, and national level complement the goals of intermediary initiatives.
- **Managing quality:** Intermediaries engage in strategic planning and service design, measurement and evaluation, and adaptive practices in order to achieve continuous improvements in performance.

Intermediary activities can be coordinated by a variety of different kinds of organizations including – but not limited to – employer organizations (e.g., chambers of commerce, trade associations), labor-management partnerships, community colleges, one-stops, community-based organizations, and placement/temporary employment firms.¹¹ While some WIBs – such as the Boston Private Industry Council – take on intermediary functions, the vast majority do not for reasons of history, culture, staffing, and their role as public institutions.¹² WIBs and intermediaries "represent two different but complementary and synergistic

⁹ Giloth, *Introduction*, p. 7

¹⁰ Our model is loosely based on New Ways to Work's *Strategic Intermediary Functions* for youth workforce intermediaries.

¹¹ Prince and Mills (2003) provide an excellent summary of the strengths and weaknesses of each kind of organization in their report, *Career Ladders A Guidebook for Workforce Intermediaries*, pp. 7-11.

¹² Kazis, *What Do Workforce Intermediaries Do?*, p. 77

forms of integration;" WIBs primarily focus on policy issues and strategic planning rather than operational details.¹³

ENGAGING KEY STAKEHOLDERS AND RESOURCES



Engaging key stakeholders and securing resources are the first major challenges new intermediaries are likely to encounter, since developing good relationships with community leaders and access to resources are vital steps to getting new initiatives up and running. Additionally, these are also key ongoing tasks for any organization that hopes to achieve sustainability. This section discusses promising practices in these areas of activity.

Engaging stakeholders

Effective intermediaries embrace a systems approach. As such, it is crucial that their networks of supporters include a full array of key stakeholders from the local community. Stakeholders can be roughly divided into four categories:

- *Investors* are public and private entities that provide funding, in-kind contributions, and other forms of support;
- *Service providers* are organizations that offer services directly to intermediary customers, including both jobseekers and employers;
- *Intermediary customers* are employers and jobseekers; and
- Finally, a coalition of these groups must act as the *advisors* - the group that sets the goals, establishes accountability, and provides direction for the intermediary's initiatives.

Investors

In order to secure stable resources and ensure the long-term sustainability of intermediary efforts, investors must be fully engaged partners. Typical investors include local foundations, philanthropists, and charitable organizations with an

¹³ Giloth, *Introduction*, p. 17

interest in economic development, workforce development, and/or anti-poverty issues. In some areas, state and local governments may also lend their support. In Central Texas, for example, the City of Austin and Travis County provide financial support to both CATF and Capital IDEA. Other intermediary funders in our region include philanthropists, foundations, corporate sponsors, and the Greater Austin Chamber of Commerce.

Funders in some regions have collaborated to establish dedicated workforce development and training funds. This allows groups to pool their resources and helps major investors leverage funds from other organizations through matching commitments and a variety of other strategies. For example, the New York City Workforce Development Funders Group is a grantmaking collaborative of more than a dozen organizations that "informs the funding community of employment issues and provides a forum to work in partnership with the public sector and nonprofit community."¹⁴ San Francisco is home to a similar organization known as the Bay Area Workforce Funders Collaborative.

Service Providers

Intermediaries strive to provide their customers with a comprehensive array of services, ranging from training activities to child care services to technical assistance for employers' human resources or managerial staffs.¹⁵ Because no single organization is capable of providing such a large variety of direct services, building partnerships is essential. Common partners for intermediary initiatives include one-stop centers, community colleges, training providers, social services agencies, and a variety of other workforce and economic development organizations.

As with any collaborative effort, managing relationships effectively is important to intermediary success. Staff openness to cooperating with other agencies is vital;

¹⁴ The New York City Workforce Development Funders Group, *Brochure*. December 2004.

¹⁵ Poppe, Strawn, and Martinson, *Whose Job Is It?*, pp. 46-47 and 57-58; JFF, *Hiring, Retaining, and Advancing Front-Line Workers*, p. 4

some researchers recommend intermediaries formalize partnerships through memoranda of understanding (MOUs).¹⁶

Customers

As previously noted, one of the most unique and promising aspects of intermediaries is their dual-customer focus. A common way of engaging employers and workers is through the organizations they are likely to belong to or interact with on an ongoing basis. For jobseekers, typical examples include community-based organizations, faith-based communities, and social services agencies. Employers can be engaged via multi-firm collaborations, industry and trade associations, chambers of commerce, and other business groups.¹⁷

Central Texas intermediary efforts already take advantage of local social networks to support intermediary efforts. Capital IDEA, for example, is a joint venture between local business leaders and Austin Interfaith – a coalition of local churches and their members. Capital Area Training Foundation partners with and has received considerable support from the Greater Austin Chamber of Commerce.

Advisors

The final general category of key stakeholders, "advisors," includes all of the previously mentioned individuals and organizations as well as local political leaders, elected officials, and WIB members. Having all of a community's players at the table in an advisory capacity ensures buy-in, expands access to resources, and increases the amount of local labor market, economic, and political information available to a intermediary initiative.

¹⁶ Meléndez and Kohler-Hausmann, *UMOS Value-Added Contribution to One-Stop Performance in Milwaukee*, p. 4

¹⁷ Kazis, *New Labor Market Intermediaries*, p. 26; JFF, *Hiring, Retaining, and Advancing Workers*, p.18; Reardon, *Working It Out*, Online

Local circumstances often dictate the necessity of bringing additional stakeholders into the fold in an advisory capacity. In strong labor states, for example, intermediaries would be wise to involve unions in their activities.

Securing resources

Intermediary initiatives need to secure an array of resources, financial and otherwise. For example, in one survey intermediary practitioners reported needing capital, information technology, cost accounting, human resources, marketing, general management, and research and development assistance.¹⁸ Securing operations funding and making it sustainable for the long term is a primary concern for every intermediary. Promising strategies include:

- *Developing and blending multiple funding streams early on.* This leads to greater flexibility and better ability to adapt to changing conditions.¹⁹
- *Forming partnerships between intermediaries and business.* Many businesses can take advantage of federal, state, and local public subsidies and tax incentives available to companies for locating in key locations and hiring from targeted populations. Examples of federal incentives include the Work Opportunity Tax Credit, and deductions for the cost of removing barriers to work for people who are disabled or elderly, Empowerment Zone Employment Credits (EZ Wage Credits), Renewal Community Employment Credits (RC Wage Credits), and Indian Employment Tax Credits.²⁰ Other financial assistance is sometimes available to businesses in industries experiencing workforce fluctuations or small businesses that are trying to compete and grow.²¹ However, researchers caution against moving a business to a specific area or hiring a targeted class of workers solely to take advantage of financial incentives.²²

Researchers from Jobs for the Future conducted a series of surveys and interviews to explore "challenges and strategies for creating a sustainable, efficient, and

¹⁸ Ryan, *The Final Act*, pp. 323-324

¹⁹ Rubin, Seltzer, and Mills, *Financing Workforce Intermediaries*, p. 298; Crandall, *Promoting Employer Practices That Increase Retention and Advancement*, Online; Grobe, *After the Sunset*, p. 2

²⁰ Workforce Advantage, *Promising Practices for Utilizing Public Funding: Introduction*, Online

²¹ Ibid.

²² Workforce Advantage, *Promising Practices for Utilizing Public Funding: Keys to Success*, Online

scaleable financing system for workforce intermediaries."²³ The strategies they identified include:²⁴

- Leveraging WIA funds, including governors' discretionary funds, dislocated worker funds, and IWA ILAs or vouchers.
- Taking advantage of "secondary" public sources, including TANF and state DOL funds.
- Securing funding from private sources such as foundations and philanthropists. These funds are advantageous in that they are more flexible than public funds and can help leverage additional public funds. As discussed, these funds can sometimes be tapped through regional workforce development funding collaboratives.
- Obtaining financial support from businesses via fee-for-service arrangements and corporate contributions.
- Starting for-profit placement firms that act as intermediaries or intermediary partners.

Making the case

Persuading key stakeholders to support intermediary initiatives can be challenging. Workforce development does not enjoy the prominent place on the public policy agenda that many other issues do. Additionally, the reported shortcomings of training programs from the 1960s through the early 1990s have caused many to shy away from making traditional workforce development investments.²⁵

Nonetheless, workforce development remains an important – if rarely discussed – priority to Americans. A recent national telephone poll of 1,000 registered voters conducted by Bennett, Petts & Blumenthal/Voter Consumer Research found that:

²³ Rubin, Seltzer, and Mills, *Financing Workforce Intermediaries*, p. 293

²⁴ Ibid, pp. 298-299

²⁵ A 2002 paper entitled "Skills Training Works: Examining The Evidence" provides an excellent discussion of the debate over the value of training activities. The literature review concludes that many studies held up as examples of training programs' shortcomings have been misinterpreted, taken out of context, or manipulated for political aims. The paper is available online from the Workforce Alliance:
<http://www.workforcealliance.org/Skills%20Training%20Works%20Report.pdf>.

- The public is supportive of job training: 87 percent favor job training programs (47 percent strongly favor), while only 12 percent do not favor them;
- Support for job training runs at more than 80 percent in all regions of the country with 93 percent of Democrats, 86 percent of independents, and 79 percent of Republicans supporting job training programs; and
- Seventy-seven percent view “providing education and job training to people who have lost their jobs” as a good strategy for improving the economy.²⁶

Despite the public's reported support for workforce development, it can still be challenging to persuade key stakeholders to support an initiative. This task is made more difficult by the fact that few people are familiar with workforce intermediaries. To help engage stakeholders, advocates must educate community members about the work intermediaries do and highlight their value to employers, jobseekers, and communities.

There is a growing body of evidence demonstrating that training initiatives result in positive outcomes for firms and their investors. For example, a 2004 report analyzing American Society for Training and Development data indicated that there is a positive correlation between human capital investment and stock returns.²⁷ An evaluation of a training program at a major U.S. bank found that the training led to improved employee commitment, customer service behaviors, turnover, absenteeism, and financial performance, ultimately resulting in a 6 percent return on investment to the company.²⁸ A survey conducted by the American Management Association found a direct correlation between increased training activities and higher profits.²⁹ Yet another study found that using an intermediary to measure or redesign jobs leads to higher productivity and wages, benefiting both employer and workers.³⁰

There is also evidence that the workforce development activities associated with intermediaries are successful in improving outcomes for jobseekers. Research

²⁶ Bennett, Petts, and Blumenthal, *Memorandum to the Workforce Alliance*, October 30, 2003

²⁷ Bassi, Harrison, Ludwig, and McMurrer, *The Impact of U.S. Firms' Investments*, pp. 14-21

²⁸ Matthewman and Matignon, *Human Capital Reporting*, pp. 60-62

²⁹ JFF, *Hiring, Retaining, and Advancing*, p.14

³⁰ PEERS, *Workforce Intermediaries*, p.17

shows that participation in workforce development activities can lead to higher wages, increased receipt of health and other employer-provided benefits, more time spent working, increased job retention, and lifting families out of poverty.³¹ Combining pre-employment skills, industry-based training, appropriate supports, and on-the-job skill upgrading can have a positive impact on wages, retention, and/or advancement.³² Furthermore, studies suggest that training which focuses on human capital development yields lasting effects and employment and earnings.³³ The 2002 report, "Skills Training Works: Examining the Evidence" provides a summary of other recent research on the outcomes of training programs.³⁴

Although sometimes overlooked, workforce intermediary activities produce benefits for communities as well. Intermediaries address problems in local labor markets resulting from global economic changes and add value to the existing publicly funded workforce development system.³⁵ Communities can also save money on public assistance programs when intermediaries help families achieve self-sufficiency. A return-on-investment analysis of Detroit's Focus: HOPE program found that after approximately 3 years, program graduates had paid an amount in taxes that was equivalent to the cost of their training.³⁶ Finally, intermediary initiatives can also have spillover benefits to economic development efforts. For example, the Japanese firm Aisin AW chose Durham, North Carolina as the site for its new plant largely because the city's ability to prepare workers for the new jobs made it stand out from its competitors.³⁷

³¹ Marano, *Promising Practice*, p. 5

³² Poppe, Strawn, and Martinson, *Whose Job Is It?*, pp. 41-44

³³ King, *The Effectiveness of Publicly Financed Training*, p. 88; Hollenbeck et al, *Initial WIA Net Impacts*, pp. 5-10

³⁴ Available online:

<http://www.workforcealliance.org/Skills%20Training%20Works%20Report.pdf>

³⁵ Rubin, Seltzer, and Mills, *Financing Workforce Intermediaries*, pp. 294-296

³⁶ Reardon, *Working It Out*, Online

³⁷ Ibid

Funding challenges

Securing financial resources is an ongoing challenge for many intermediaries. Intermediaries are most often funded for job placement (56 percent), occupational training (55 percent), aptitude testing (54 percent), career counseling (48 percent), ESL services (47 percent), job readiness services (46 percent), and supportive services (45 percent).³⁸ Nevertheless, gaps in funding make supporting a comprehensive array of workforce intermediary activities difficult. Examples of activities that are difficult to fund include:

- Post-employment services, including further occupational training, supportive services, and incumbent worker training;
- Services to employers such as funding to identify employer needs, and human resources services;
- Labor market research and analysis; and
- Planning, facilitation, and program development.³⁹

Achieving sustainability and navigating the eligibility rules associated with public funds also pose significant challenges.⁴⁰

Most intermediaries are able to overcome these hurdles by blending funding streams, leveraging added resources, and insuring that a sufficient quantity of flexible funds (i.e., from private funders and employers) are available to support their activities. Some researchers and advocates have suggested developing national venture capital funds like those serving the community development field (e.g., the Enterprise Foundation, Living Cities).⁴¹

³⁸ Rubin, Seltzer, and Mills, *Financing Workforce Intermediaries*, p. 297

³⁹ *Ibid.*, pp. 299-302

⁴⁰ *Ibid.*

⁴¹ Giloth, *Introduction*, pp. 24-25

PROVIDING AND BROKERING SERVICES

Since the structures of intermediaries vary, some organizations choose to act strictly as brokers of services while others choose to provide some direct services themselves. Under either arrangement, there are numerous sub-categories of activities that intermediaries engage in including recruiting and retaining customers, job training, career development, work supports, and technical assistance to businesses.



Recruiting and retaining customers

Many workforce development initiatives have suffered the consequences of the "if-we-build-it-they-will-come" approach to recruiting program participants. Practically speaking, programs are unlikely to operate at full capacity unless they engage in strategic recruiting practices.

Recruiting customers for intermediaries is especially challenging because of their dual-customer focus. For businesses, research indicates that aggressively marketing retention and advancement services to employers may be helpful.⁴² Common recruiting strategies include word-of-mouth referrals among employers, active networking through business contacts, using other organizations to approach firms, direct mail campaigns, cold-calling to businesses with job vacancies, recruiting groups of firms through employer organizations, targeting "champions" within firms, and "selling" the initiative in "business terms."⁴³

Managing employer relationships is especially important and sometimes challenging.⁴⁴ Common issues include clashing cultures between employers and

⁴² Crandall, *Promoting Employer Practices That Increase Retention and Advancement*, Online

⁴³ Abt Associates Inc., *Private Interests, Shared Concerns*, pp. 18-24

⁴⁴ Abt Associates Inc., *Private Interests, Shared Concerns*, pp. 34-38; Fitzgerald, *Community Colleges and Labor Market Intermediaries*, p. 8; McPherson, Long, and Sim, *Engaging Employers*, pp. 34-35

public/nonprofit agencies, employer distrust of publicly funded initiatives, and poor communication between partners.⁴⁵ To overcome these and other challenges, research suggests that the following strategies are helpful:

- Ensuring that employers have a large enough role in initiatives to "engender a strong sense of ownership."⁴⁶
- Recognizing that employer participation in workforce initiatives is based on economic need rather than social welfare concern.⁴⁷
- Using a personal approach can make a difference.⁴⁸ Appointing "employer account representatives" who act as a single point of contact for employers, for example, can be helpful.⁴⁹
- Working towards effective two-way communication on issues of labor market demand. This is important to keeping employers satisfied and ensuring that job training leads to real opportunities for workers.⁵⁰

Intermediaries must ensure that employers' representatives are involved in an advisory role. The JOBS initiative found that engaging business representatives could provide business savvy, professional connections, PR value, financial resources, increased fundraising potential, and credibility in economic development.⁵¹

Recruiting jobseekers presents other challenges. Unless an intermediary is housed in a long-standing program with a good reputation in the community, engaging so-called "difficult-to-serve" jobseekers can be especially difficult. Among the strategies for increasing the number of people who use intermediaries:

⁴⁵ McPherson, Long, and Sim, *Engaging Employers*, pp. 34-37

⁴⁶ Ibid, p. 4

⁴⁷ Ibid

⁴⁸ Ibid, p. 40

⁴⁹ Crandall, *Promoting Employer Practices That Increase Retention and Advancement*, Online; Fitzgerald, *Community Colleges and Labor Market Intermediaries*, p. 8; Abt Associates Inc., *Private Interests, Shared Concerns*, pp. 37-38

⁵⁰ Kazis, *New Labor Market Intermediaries*, p. 26

⁵¹ Abt Associates Inc., *Private Interests, Shared Concerns*, p. 7

developing relationships with community organizations that can provide referrals, offering a walk-in location, engaging in aggressive recruiting practices, and locating program offices in a location that is accessible via public transit.⁵²

Retaining workers also requires diligence. Organizations must ensure that individual customers' basic needs – e.g., food, shelter, and transportation – are met so they can concentrate on workforce development activities. As the work of psychologist Abraham Maslow demonstrated, basic life-sustaining needs must be satisfied before higher needs – such as the "self actualization" of a rewarding career – can be addressed.⁵³ For difficult-to-serve clients, intensive case management is often needed to help jobseekers navigate the confusing and sometimes intimidating world of workforce and social service offerings.⁵⁴ Conducting intake assessments of customers needs can help ensure that personal barriers will not act as distractions to full program participation.⁵⁵ Researchers also suggest that intermediaries screen participants to gauge their preferences for different types of work.⁵⁶

Because the number of spaces in most publicly funded programs is limited and because program administrators are under considerable pressure to produce positive outcomes, intermediaries sometimes encourage jobseekers to "self-select" themselves as participants by requiring certain activities prior to formal program entry. This allows organizations to improve the odds that those jobseekers who enroll in programs are sufficiently self-motivated to deal with the challenges of sticking with it. While these "creaming" strategies are likely to improve program outcomes, they are nevertheless controversial because they tend to leave the most difficult-to-serve customers unassisted.

⁵² Meléndez, Borges-Méndez, and Donohue, *SER Metro-Detroit Value-Added Contribution to the One-Stop System Performance*, p. 2

⁵³ Wikipedia, *Abraham Maslow*, online

⁵⁴ King et al, *Training Success Stories*, p. 160

⁵⁵ Poppe, Strawn, and Martinson, *Whose Job Is It?*, p. 46; King et al, *Training Success Stories*, p. 159

⁵⁶ *Ibid*, pp. 46-47; Abt Associates Inc., *Private Interests, Shared Concerns*, pp. 32-33

Some programs also require students to take a battery of assessments before program entry, giving the intermediary an opportunity to ensure that customers have an accurate understanding of the amount of work they'll need to do to succeed in the program.⁵⁷ Austin's Capital IDEA, for example, requires potential participants to attend orientation sessions, take a series of tests, and meet with career counselors to determine a career path, set goals, understand their abilities, and develop a budget before they can enroll in the program.

As a final note, it is important to be mindful of the fact that employee retention is a major priority for employers, especially when they make substantial investments in potential employees. Intermediaries can help employers retain workers by following-up with workers and providing employers guidance on retaining employees. Intermediaries' responsibilities do not end with the placement of a worker in a new position - workers often need ongoing supports such as child care and transportation to succeed at new jobs. Human resources experts note that rewards and recognition are essential to keeping high-performing employees satisfied. Examples of incentives employers can offer workers to build loyalty include performance-based pay, cash bonuses, gift certificates, meals, parties, and various other awards for outstanding performance.⁵⁸

Training

Generally speaking, workforce intermediaries provide or broker training in three areas: basic skills training, job-specific skills training, and skills-upgrading training. Researchers have identified several across-the-board best practices for training activities.

First, adopt "high road" strategies that lead jobseekers towards careers with high skills and high wages whenever possible. Research indicates that this approach leads to the best outcomes for workers.

⁵⁷ Poppe, Strawn, and Martinson, *Whose Job Is It?*, pp. 46-47; Crandall, *Promoting Employer Practices*, Online

⁵⁸ JFF, *Hiring, Retaining, and Advancing*, p. 7

Second, know your customers. Intermediaries are advised to assess a jobseeker's level of skill attainment upon program entry. As discussed, assessing the current skill level of potential participants helps programs provide jobseekers with clear expectations and, additionally, ensures that they obtain the necessary foundation to proceed to more advanced learning and skill development.

Third, think outside the box. Many of the people served by intermediaries did not – for a variety of reasons – succeed in the "first-chance" system of K-12 public education. As such, program designers need to be aware that traditional education and job training models are always be appropriate for meeting the needs of the population they serve. Alternative strategies that are sometimes helpful to intermediary program participants include training workers in their native language, offering "modular" training programs that allow certificate and degree programs to be broken into chunks that can be taken separately and linked together towards a credential, offering "compressed" or "intensive" programs that substantially shorten the amount of time it takes to complete a course and allow people to enter programs year round, and creating "bridge" programs that link adult basic education and college credit classes.⁵⁹

Researchers Poppe, Strawn, and Martinson provide several other recommendations for skill-upgrading programs:⁶⁰

- Mix instructional methods in order to address the diverse learning styles of students.
- Offer training at an employer's facilities or a job-like setting. This can help students understand the expectations and cultural norms of their current and/or future work environment.
- Provide classes in cohorts. This encourages a high degree of student-student interaction and support.
- Encourage a high level of student-teacher interaction.

⁵⁹ I. JFF, *Hiring, Retaining, and Advancing*, p. 15; Poppe, Strawn, and Martinson, *Whose Job Is It?*, pp. 46-47, p. 58, pp. 46-47

⁶⁰ Ibid

- Finally, closely monitor attendance and progress to ensure that jobseekers are progressing and to ensure that your program will be able to deliver the caliber of workers expected by employers.

In addition to these overarching best practices, there are additional strategies specific to each of the three major training areas. These are discussed at length below.

Basic skills

Basic skills training is typically targeted to the lowest-skilled workers with the least amount of work experience. Basic skills training incorporates an array of activities including basic adult and literacy education, career education, and so-called "soft skills" training. Because a foundation in basic skills is essential to advancement to more sophisticated types of training, screening jobseekers to test for basic skill needs is important.

Poppe, Strawn, and Martinson's recommendations for basic skills training include:⁶¹

- Creating supportive work placements that provide opportunities for learning basic skills, soft skills, and marketable job skills and offer close supervision.
- Integrating basic education and English as a Second Language (ESL) into training.
- Developing "fast-track" GED courses to allow jobseekers with limited skills to obtain a GED quickly then advance to job-skills training.

While basic skills training has inherent value, outcomes for jobseekers are substantially improved when it is paired with work experience and additional opportunities for job-skills training.⁶² An evaluation of Welfare-to-Work programs found that high school non-graduates who participated in basic education followed by post-secondary training and/or educational activities earned fully 47

⁶¹ Poppe, Strawn, and Martinson, *Whose Job is It?*, pp. 46-47

⁶² Martinson and Strawn, *Built to Last*, p. 2

percent more over the course of three years than those who solely participated in basic education activities.⁶³

Job-specific skills

Job-specific skills training is at the crux of the dual-customer approach. Programs that prioritize occupational skills training and target high-paying, high-demand occupations are most successful at meeting jobseeker needs.⁶⁴

Perhaps the most important task associated with providing job-specific skills training is deciding what kind of training to offer. Successful programs use highly structured processes to identify and target promising sectors and occupations. As a study by King et al noted, "more-successful training programs have made the "training-for-what" question the very heart of their approach."⁶⁵ Researchers have also found that:

- Intermediaries should consider targeting higher wage jobs, larger firms, firms with low turnover, and occupations that require reading and writing, all of which can make a difference in retention and advancement.⁶⁶
- Training received from an employer is more likely to be used on the job than training obtained at a school.⁶⁷
- Securing hiring commitments from employers is important and provides an extra incentive for trainees.⁶⁸ Agreements between employers and training providers must be carefully negotiated.⁶⁹
- Implementing built-in feedback loops and continuous improvement processes is key to long-term success.⁷⁰

Most importantly, job-specific skills training must be demand-driven. Many intermediaries respond to this imperative by conducting a thorough needs assessment before developing programming. Researchers suggest customizing

⁶³ Bos et al, *Improving Basic Skills*, p. 16

⁶⁴ King et al, *Training Success Stories*, pp. 159-160; Reardon, *Working It Out*, Online

⁶⁵ King et al, *Training Success Stories*, p. 160

⁶⁶ Poppe, Strawn, and Martinson, *Whose Job Is It?*, pp. 33-37; Andersson, Holzer, and Lane, *The Interactions of Workers and Firms*, pp. 42-45

⁶⁷ Isbell, Trutko, and Barnow, *Customized Training for Employers*, p. 207

⁶⁸ Isbell, Trutko, and Barnow, *Customized Training for Employers*, pp. 224-225

⁶⁹ Ibid.

⁷⁰ Ibid.

training to meet the needs of specific jobs and recommend involving employers in the design and delivery of services.⁷¹ When a skill set is needed industry-wide, it can be beneficial to involve a coalition of employers.⁷²

Skills upgrading

Skills upgrading is essential to career advancement for most workers in today's economy. However, many workers do not know what kinds of skills they should be upgrading or don't believe that they have the time or money to continue their education while working to support their families at the same time. The keys to operating successful skills upgrading programs include understanding the skills workers bring to the table, being cognizant of employers' needs, and designing programs that are flexible and sensitive to workers' needs.⁷³

Preliminary research findings in this area indicate that skills upgrading programs are most effective when they are offered on or near the work site during regular work hours and accompanied by work supports and incentives.⁷⁴ In Boston for, example, WorkSource Partners, Inc offers onsite training at long-term care facilities to Certified Nursing Assistants working towards nursing degrees.

Partnerships between publicly-funded customized training providers and employers work well, although some researchers argue that public funds should be limited to training for skills that are transferable to other jobs.⁷⁵

Finally, although it is difficult for most workers to find time to take advantage of skills upgrading opportunities offsite and outside of their working hours,

⁷¹ Fitzgerald, *Moving the Workforce Intermediary Agenda Forward*, p. 7; Mills and Prince, *Employer-Led Organizations and Career Ladders*, pp. 12-13; Poppe, Strawn, and Martinson, *Whose Job Is It?*, p. 46; Prince and Mills, *Career Ladders*, p. 11; Isbell, Trutko, and Barnow, *Customized Training for Employers*, pp. 207-225

⁷² Isbell, Trutko, and Barnow, *Customized Training for Employers*, p.224

⁷³ Fitzgerald, *Community Colleges as Labor Market Intermediaries*, p. 31

⁷⁴ Poppe, Strawn, and Martinson, *Whose Job Is It?*, pp. 47-50

⁷⁵ Ibid; Isbell, Trutko, and Barnow, *Customized Training for Employers*, pp. 207-225

intermediaries should nonetheless consider providing financial assistance and work supports to workers who wish to pursue that path.⁷⁶

Career development

The most-cited shortcoming of the "work first" movement in U.S. workforce development policy is probably its myopic focus. While work-first initiatives show promise for quickly moving people into employment and reducing their dependence on public assistance, the fact remains that a quick placement into a low-skilled, low-wage job is unlikely to lead to future opportunities for workers – opportunities that are absolutely necessary to move families out of poverty and into a self-sustaining living situation.⁷⁷

Most intermediaries answer this challenge by focusing on connecting entry-level positions to opportunities for advancement through what are commonly called career ladders. The term "career ladders" refers to "a set of occupations that are linked together by common or complementary skills."⁷⁸ These linkages help workers advance and – at the same time – expand the recruiting pool for employers. A health sector career ladder, for example, might begin with an entry-level housekeeping position leading to a nursing assistant certificate leading to a vocational nursing license and ultimately to a four-year degree in nursing.

There is a rapidly growing body of research on career ladders that is too large to completely cover in this short paper. This section provides a summary of some of the best practices in this area of activity. Persons interested in more information on career ladders are advised to look at the work of Jobs for the Future and the School-to-Work Intermediary Project.⁷⁹

Intermediaries developing career ladder initiatives typically begin by identifying potential avenues for advancement in the local labor market by looking at high-

⁷⁶ Ibid

⁷⁷ See King, *The Effectiveness of Publicly Financed Training*, pp. 82-87

⁷⁸ Prince and Mills, *Career Ladders*, p. 4

⁷⁹ See <http://www.jff.org> and <http://www.intermediarynetwork.org>.

demand occupations and skill linkages.⁸⁰ Once these linkages are established, intermediaries can begin talking to employers about the skills and education needed to advance from one "rung" to the next then develop customized training as needed. Career ladders vary in the number of tiers, how people reach the first rung, the degree to which employers change HR practices, the range of services offered, and the organization responsible for operating the career ladder.⁸¹ Because labor markets can change rapidly, it is important to make sure career ladders are flexible and adaptive to employer needs.

Increasingly, progress may not be limited to linear progress up a "ladder," but can also include numerous horizontal career moves that serve to broaden a jobseeker's skill base and breadth of experience. A nursing candidate, for example, might expand his scientific knowledge through a lab assistant position then make a vertical move to a medical records position to expand his administrative experience and computer skills. This trend has prompted some public policy researchers to revise the career ladders concept and, instead, use the metaphor of a "climbing wall" – a practice wall used by rock climbers that is scaled through a series of both horizontal and vertical moves.

Technical assistance for employers

Keeping in mind the dual-customer focus of workforce intermediaries, it is clear that there are opportunities to serve employers that go beyond simply developing a pipeline to fill their vacancies. Increasingly, researchers are pointing towards providing technical assistance to employers as an emerging best practice.⁸² The Jobs for the Future report *Hiring, Retaining, and Advancing Front Line Workers: A Guide to Successful Human Resources Practices* recommends the following:⁸³

⁸⁰ Ibid

⁸¹ Ibid, p. 6

⁸² Ibid, p. 15; Abt Associates Inc., *Private Interests, Shared Concerns*, pp. 25-27, Reardon, *Working It Out*, Online

⁸³ pp. 9-17

- Developing an orientation program to help new employees acclimate to a business, understand their roles, and be aware of employer expectations.
- Starting a mentoring program to provide job coaching, support, and advice.
- Creating cross-training opportunities.
- Hiring a group of immigrants who are affiliated by a common language and culture. This benefits employers by providing them with a set of employees that is often more loyal than native employees. Immigrant workers benefit by having increased job opportunities than they might typically enjoy with limited English proficiency.
- Monitoring local wage and benefit statistics to stay competitive.
- Providing rewards – financial and otherwise – to high-performing employees.
- Investing in the skills of supervisors, especially through training on diversity and communication skills.
- Helping employees access needed supports by providing info on supports offered by government programs and intermediary partners. Consider offering some employer-provided supports such as on-site child care, employee assistance programs, financial education, and assistance with education.

Helping businesses understand how to better manage their human resources builds loyalty to intermediaries. It provides employers with a valuable service, both in terms of operational efficiency and their bottom line. Furthermore, improving human resources practices also provides benefits to workers in terms of increased opportunities for advancement, improved support from their employer, and increased access to needed services and training.

Work Supports

It is widely accepted that providing work supports substantially increases the likelihood that workforce development participants will successfully complete a program. Examples of work support partners provide include child care, transportation, counseling, mentoring, peer support groups, substance abuse treatment, health care, and case management. Workforce programs sometimes make the mistake of cutting off participants' access to these services once they obtain employment. To ensure that workers have sufficient time to adjust to their new jobs and reach a level of earnings that allows them to meet these needs on

their own, it is preferable to phase out supports over time as participants' financial situations warrant.

Staffing intermediary programming

As a final note on the management of intermediary services, researchers have noted that intermediary staffing is vitally important:

- Workforce intermediary staff members need to be able to assess jobseekers' skills and interests as well as understand local labor market operations.⁸⁴
- Staff members must feel comfortable working with diverse and divergent customer populations, ranging from difficult-to-serve, low-income jobseekers with substantial personal obstacles to business and political leaders.
- Managers must monitor their organization's approach to learning, have a commitment to quality, promote innovation, and motivate their employees and customers.⁸⁵
- Finally, in the job skills arena, having skilled, experienced teachers and plenty of opportunities for staff development is also essential.

⁸⁴ Poppe, Strawn, and Martinson, *Whose Job Is It?*, p. 53

⁸⁵ Ryan, *The Final Act*, p. 318

PROMOTING POLICY IMPROVEMENTS

A third important area of activity for workforce intermediaries is promoting effective workforce development policies and practices, both among their partner organizations and in the larger, external policy environment.



There are numerous strategies for accomplishing external change. The Jobs Initiative, for example, set up "Jobs Policy Networks" – groups of organizations aiming to effect systems reform changes in public policy, labor markets, and institutions.⁸⁶ Many groups choose to concentrate their efforts on advocacy directed towards their local WIB or community college system – the institutions which act as the primary workforce development policymakers in most communities.

Currently, there are four areas of workforce development policy that many intermediaries are especially interested in:

- **"High Road" Strategies** Programming that leads to work with high skills and high wages.
- **Systems Focus** Many policymakers and practitioners are interested in exploring approaches that cut across traditionally disparate programs, agencies, and funding streams to provide integrated, seamless services.
- **Regional Approach** As workforce development policy grows increasingly connected to economic development, many organizations are recognizing that they need to be examining workforce issues within the context of their entire regional economy, not just their own locality.
- **Sectoral Initiatives** Sectoral initiatives are increasingly recognized as a best practice in workforce policy. For larger employers, sectoral initiatives offer respite from the intense competition for skilled workers in high-demand fields. Small and mid-sized employers often lack the resources to develop training programs on their own but sectoral initiatives offer them the opportunity to combine their resources to develop training programs that help them meet their workforce needs. Finally, sectoral initiatives benefit workers by creating

⁸⁶ Abt Associates Inc., *Private Interests, Shared Concerns*, p. 14

job training infrastructure that is highly complementary to career ladder initiatives.

MANAGING QUALITY



A final key area of intermediary activity is managing quality.

Many intermediaries use labor market information to analyze current and future labor market trends, understand employers and

their needs, understand jobseekers and their needs, establish goals, and develop a well-defined mission.⁸⁷ Understanding the economic context of a project allows for better-informed decision-making.

Intermediaries also gather program data and evaluate performance. Evaluation occurs as a means of contributing to both the improvement of an individual program and the larger intermediary field in general. The most successful evaluations are planned from day one of an initiative. This allows for data collection needs to be built-into a program's operations from the get-go (vs. costly and labor-intensive back-fitting) and forces initiatives to agree on some general goals, helping to ensure that all parties have similar expectations. However, this does not mean that initiatives should be evaluated from their first day of operation. Evaluation theory suggests that, at a minimum, a program should be relatively stable, enjoy agreement among the persons involved with the program regarding what it is trying to achieve, and allow for enough time and money to conduct the evaluation correctly.⁸⁸ A professional evaluator can conduct an evaluability assessment when an intermediary initiative believes it has reached a reasonable level of maturity to warrant a formative review.

⁸⁷ Ryan, *The Final Act*, pp. 322-325; Poppe, Strawn, and Martinson, *Whose Job Is It?*, pp. 46-47

⁸⁸ Weiss, *Evaluation*, p. 24

Finally, intermediaries manage for quality by continuously improving operations.⁸⁹ This includes both internally-prompted changes when problems arise as well as modifying operations when evaluation results suggest that a particular strategy is not successful. As William P. Ryan – an expert in nonprofit organizational capacity – noted, "Though often overlooked, 'adaptive capacity' – the capacity to continually adapt to changing circumstances – is a crucial element of successful initiatives."⁹⁰

CONCLUSION

As others have noted, several best practices have begun to surface in this field but there is no single workforce intermediary model that dominates the current workforce development environment. Furthermore, the need for workforce intermediaries to be finely tuned to the unique needs of their communities makes it unlikely any one-size-fits-all approach will ever emerge.

This paper provides a broad overview of many promising practices identified to date. We are in an era of experimentation that requires additional trial and error and adaptation before we can fully understand and reproduce the most promising approaches. As the Central Texas Workforce Intermediary Initiative moves forward, we look forward to further contributing to this body of knowledge by documenting our experiences as the practices described in this report are applied in our region.

⁸⁹ Ryan, *The Final Act*, pp. 322-325

⁹⁰ *Ibid*, pp. 317-319

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