



# 2018 Outcomes Report

Goodwill Central Coast Workforce Development Services

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# Year in Review

## Highlights

The mission of Goodwill Central Coast is to help people with employment needs to achieve their own goals and advance towards economic self-sufficiency. Goodwill realizes its mission in two main ways: 1) Goodwill creates good jobs through our Donated Goods Retail (DGR) social enterprise and invests in our employees, and 2) Goodwill operates employment and training programs through our Workforce Development Services (WDS) department that help people in our communities obtain employment, gain skills, and advance their careers.

Goodwill's Strategic Direction focuses our work on the dominant issue facing working people on the Central Coast—the extraordinary cost of living here. The United Way Real Cost Measure says that the self-sufficiency income for a single parent with two children in Santa Cruz County is \$72,000 per year.

The Prosperity Platform—a model that helps individuals increase income, reduce expenses, and build assets to achieve financial independence—is our strategic response to this daunting challenge. Prosperity Planners assemble community resources help people achieve their own goals – such as move to a better neighborhood, purchase a reliable car, start a small business or go back to school.

In 2018, Goodwill's Prosperity Planners successfully launched and facilitated the Active Referral Network in both Santa Cruz and Monterey Counties. The network is an alignment of organizations—such as banking institutions and financial specialists, employers, housing organizations, car dealerships, churches and educational providers—whose services help individuals implement their financial plans and achieve their goals. The network aligns the outcomes of individual programs around transformative individual goals. The result is better outcomes for both individuals and the community.

Major accomplishments include:

- Advanced the Prosperity Platform in Santa Cruz and Monterey Counties. Prosperity Planners provided financial counseling to more than 111 individuals and enrolled 49 Members who work on long-term plans with a Prosperity Planner to increase income and build assets to reach their goals. Half of the Members are Goodwill employees. The other half are referred from community partners in the Active Referral Network.
- Launched Active Referral Networks in Monterey and Santa Cruz Counties. The Active Referral Network is a collaboration of organizations — such as education and training providers, financial institutions, housing organizations, car dealerships, landlords and faith-based organizations. The network coordinates services to help people increase income, save, and reach financial independence. Approximately 20 organizations from each County are participating. They meet every other month to learn how to align programs and actively refer to each other's services. This collective impact initiative has received state-wide attention. The FDIC and the California Asset Building Coalition plan to host the Financial Inclusion Summit in Monterey County in partnership with Goodwill in March of 2019.
- Advanced mission integration through the Organizational Work Program, Department of Rehabilitation, and the High School Workability Program. These programs served a total of 513 participants who received work experience and training in our retail, processing, and administrative departments.
- Supported and enrolled 281 students into training programs that led to industry recognized credentials in culinary arts, healthcare, logistics, information technology and other growth sectors on the Central Coast with an average wage of \$22.57/hour.
- Added new programs that expanded Goodwill's outreach to serve unique populations in our community. This includes the MakerSpace program in partnership with Cabrillo Community College that developed more than 50 internship opportunities for students interested in digital fabrication careers. We also expanded the

Re-Entry Pathways to Employment Program to the San Luis Obispo Jail and helped more than 70 formerly incarcerated individuals obtain meaningful employment.

- Awarded the GoodPaths initiative from Goodwill Industries International that provides training and tools to help our employees advance their careers in the retail sector. Five Career Navigators from DGR and WDS are being trained to help our employees reach success.
- Placed 1,429 individuals into jobs. Half of these placements were jobs created through Goodwill's donated-goods retail business (DGR) including unsubsidized and subsidized employment that allowed people to gain work experience to improve their skills and prepare to enter the labor market. Those that obtained industry recognized credentials had an average wage of \$23/hour.

## CARF Accreditation

CARF is an independent, nonprofit accreditor of health and human service programs. CARF accreditation demonstrates rigorous organizational and program standards organized around the ASPIRE to Excellence® continuous quality improvement framework. CARF's surveyor reviewed Goodwill's leadership, plans, policies and procedures, and evaluation systems from 2016 to 2018 to ensure Goodwill continues to maximize our ability to help those we serve reach their own goals and achieve success in their lives.

Goodwill earned a three-year accreditation (2019-2021) and received no recommendations; which means Goodwill demonstrates full conformance to each standard. This accomplishment is achieved on approximately 3% of CARF surveys. The certification focused on Goodwill's Culinary School, but applies to the entire organization.

CARF found that Goodwill Central Coast demonstrated the following strengths:

- *The organization has an outstanding mission statement. Staff members are dedicated to the mission, and every activity appears to be in line with the mission, vision, and core values of Goodwill.*
- *The organization's leadership is characterized by sensitivity to the needs of the communities that it serves and demonstrates effective planning for the future of its staff and participants. Goodwill emphasizes the humanity of everyone; Staff are interested in how people prosper - physically, financially, and professionally.*
- *The outcomes measurement and management system could easily serve as a template for other organizations in the industry. As a complement to that, the annual review process for staff and employees is also highly efficient.*
- *The culinary school is dedicated to providing and enhancing skills to those who participate and to finding suitable employment within their skill sets in the community. The culinary school is a very successful training program. After graduation, 100% of them have been placed in community-based employment.*

## Programmatic Framework

The Board's Strategic Direction specifies how we achieve our mission.

1. **Integrate Goodwill's mission into everything that we do**
  - Our mission should be fully present to all Goodwill employees. They should not only be trained and supported to be successful in their current jobs—but Goodwill should also help them achieve their career goals.
  - Our programs should maximize the use of our Donated-Goods-Retail (DGR) facilities as training sites to help participants increase skills and work-readiness.
2. **Provide unique value within the community**
  - Goodwill is an independent community resource. We should create value to the community that would not exist if Goodwill were not present. We optimize our programs to support our community, assuring

our work is targeted at those most likely to benefit from our assistance. Outcomes should be widespread and meaningful; and would not be achieved if Goodwill was not involved.

- We promote collaborations with other non-profit organizations where our mission can be enhanced.

**3. Programs must be financially sustainable**

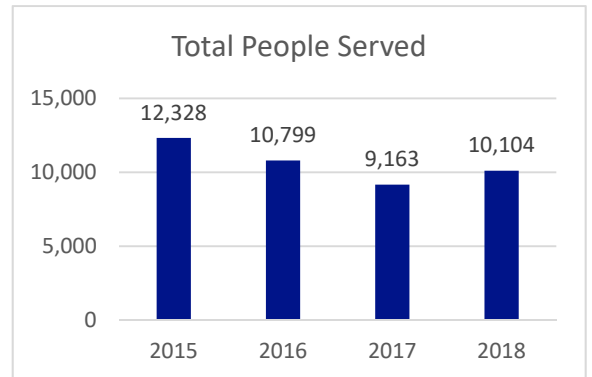
- Costs are covered by a mix of diversified third party funding sources including government, fee-for-service, and private philanthropy.
- Reserve and contingency plans are in place to ensure sustainability of programs.

**4. Provide a mix of light touch and high intensity services to create impact for the people we serve.**

- Light touch: This includes basic, job search services that serve people in short-term, transactional relationships. Goodwill offers light touch services *as long as they support high intensity programs*.
- High impact: This includes services that work with people in long-term relationships that help people reach their own goals and achieve economic self-sufficiency. Program focus should include at least one of the following:
  - Credential attainment and training in growth sectors
  - Job retention and career advancement
  - Financial capability and asset-building
  - Aligned partnerships that connect people to services that help them reach their own goals

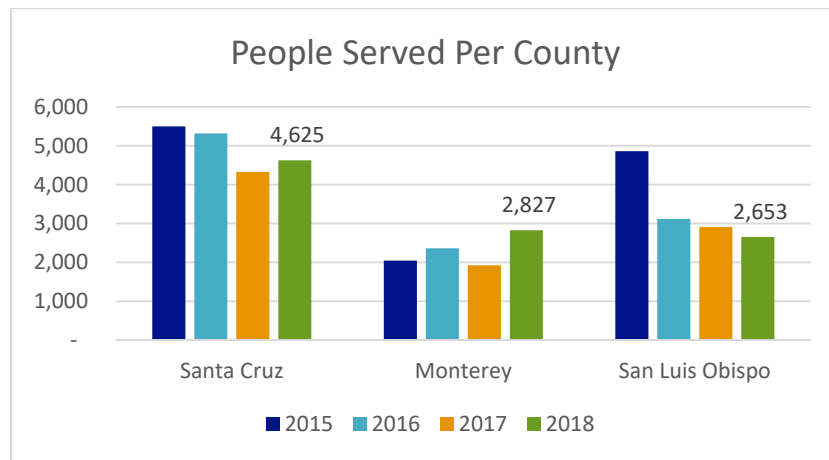
**Total Served**

Goodwill served a total of 10,104 individuals in 2018, which is an increase of 10% from last year. The increase is mainly due to the Salinas Career Center in Monterey County which increased outreach to community partners and served more job seekers in basic job search services. The increase is also due to new or expanding programs including the Prosperity Platform, increased student enrollment in Santa Cruz WIOA, MakerSpace, the Re-Entry Pathways to Employment in San Luis Obispo, and the High School WorkAbility program.



This increase defies a five-year trend that is due to an improving economy and low unemployment rate where more people are able to quickly find employment without employment and training programs. The majority of Goodwill’s referrals come from the CalWORKS program that sends customers to receive work experience in the Organizational Work Program (OWP). Due to the good economy, CalWORKS caseloads are down which has decreased OWP referrals by 30% in 2018.

Overall, 1,144 (11%) of those we served participated in intensive, high-impact services where participants worked in long-term, case management relationships with staff to reach success in their career goals. These programs include the Prosperity Platform where participants work in long-term plans with a Prosperity Planner; Organizational Work Program (OWP) where participants work from three to six months in paid work positions; and the Workforce Innovation and Opportunity Act (WIOA) services where participants complete six-month to two-year certification programs. The majority of individuals served participate in basic career services that are short-term in nature and help people quickly navigate the complex labor market to obtain immediate employment.

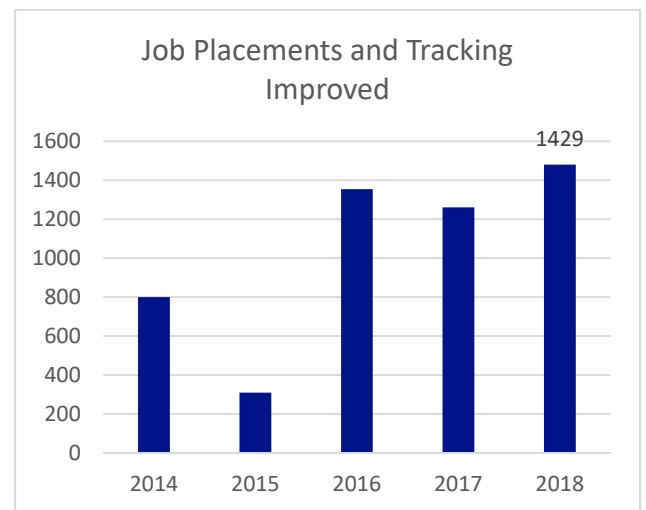


## Job Placements

Goodwill achieved 1,429 job placements in 2018. This includes subsidized and competitive employment at Goodwill as well as at local businesses.

Job placements increase by 13% since last year due to programs that focus on career ladders including WIOA Training programs, MakerSpace Intern program, and Re-Entry placement programs. Career Centers have also been more successful this year in building partnerships in the community resulting in a dramatic increase of job placements in Monterey County.

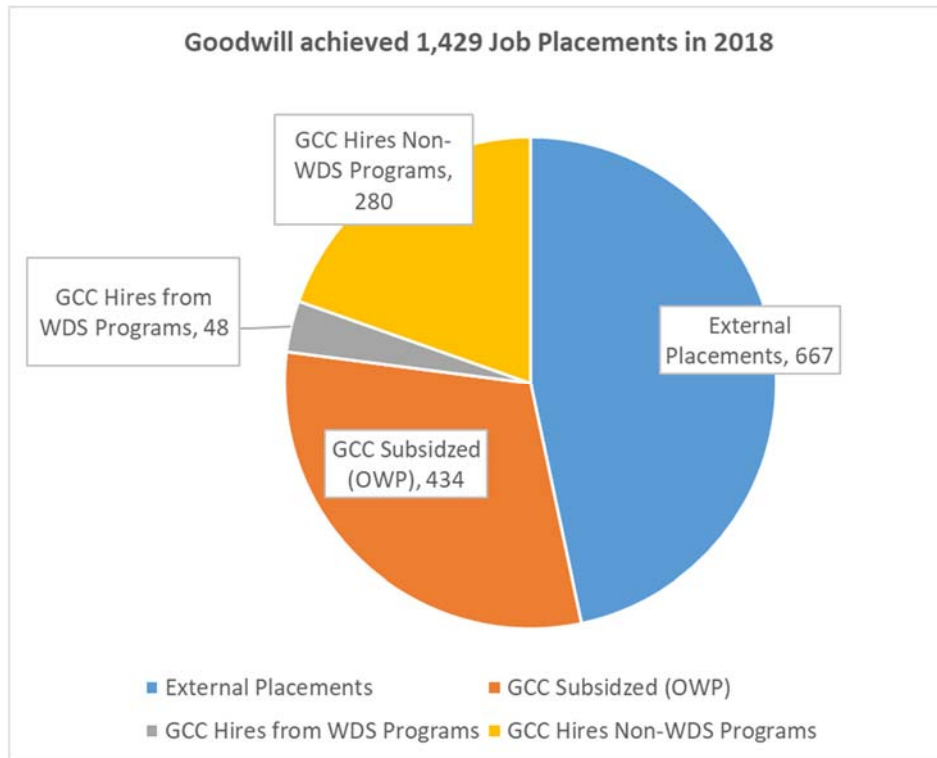
The average wage went up 12% from 2017 mostly due to the minimum wage increase and impact of wage compression. The average wage for individuals who complete training through WIOA services is 46% higher than those who participate in job readiness programs that do not lead to certifications. This indicates the importance of gaining industry-recognized credentials to increase earnings in the labor market.



Average	Average WIOA	Median	Range	% Full Time	% with Benefits
\$15.38/Hour	\$22.57/hour	\$13/hour	\$11.50-\$72/hour	70%	50%

The breakdown of Job Placements are as follows:

- Workforce programs placed 667 individuals into jobs at local business in the community.
- Job placements also include 762 internal placements that Goodwill created through our Donated Goods Retail (DGR) social enterprise, which is 53% of all placements. Of these internal placements:
  - 48 placements were Goodwill hires that were recruited from workforce programs
  - 280 placements were Goodwill hires directly from the community
  - 434 were subsidized work experience positions for individuals with barriers to employment



## Program Outcomes

### Career Centers - Basic Services

Basic Services help job seekers quickly navigate the labor market to find immediate employment through job search guidance and application assistance.

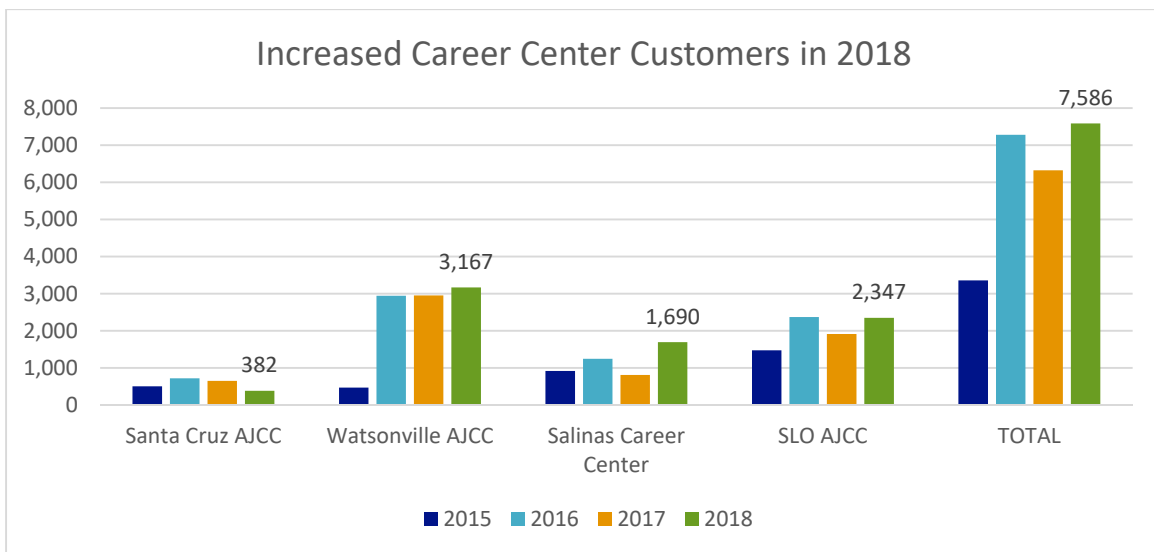
**Purpose:** Career Centers help people obtain immediate employment to reduce friction in the labor market. Career Centers also serve as a point of entrance to more intensive employment and training services and resources in the community.

**Services:** Staff help participants navigate the labor market and assist with self-directed job search activities. Goodwill has three career centers; one each in Watsonville, Salinas, and San Luis Obispo. Goodwill closed the Santa Cruz Career Center in July of 2018 and consolidated staff in Watsonville. However, we continue to provide basic career services in Santa Cruz by co-locating staff and aligning programs with Community Bridges at the Live Oak Resource Center.

**Eligibility:** None. Anyone can use career centers for basic job search assistance.

**Measurement of Success:** To be a valuable and accessible resource to all community residents as shown by the number of people accessing services.

**Results:** Met. Career Centers served a total of 7,586 individuals in 2018; this is a 20% increase from last year due to outreach programs at the Salinas Career Center which doubled job seekers receiving services. This increase offsets the closure of the Encinal Career Center in July of 2018.





## Occupational Training Programs

Occupational Training programs help people gain skills and obtain industry recognized credentials or post-secondary education to advance their careers. This includes the WIOA program and Culinary School.

### *Workforce Innovation and Opportunity Act (WIOA)*

**Purpose:** Workforce Innovation and Opportunity Act (WIOA) programs help adults and dislocated workers increase their skills and advance in industry sectors that lead to living wage jobs.

**Services:** Goodwill delivers WIOA services in partnership with the Santa Cruz Workforce Development Board and Workforce Santa Cruz County. Staff provide individualized career coaching and help participants successfully enroll and complete training programs leading to industry recognized credentials in local growth sectors. On-the-Job Training, job placement, job retention, and supportive services are also provided.

**Eligibility:** Must be a dislocated worker or adult with priority given to recipients of public assistance and other low-income individuals, veterans, and individuals who are basic skills deficient.

**Measurement of Success:** Meet enrollment, program completion, and placement goals as indicated in the below chart.

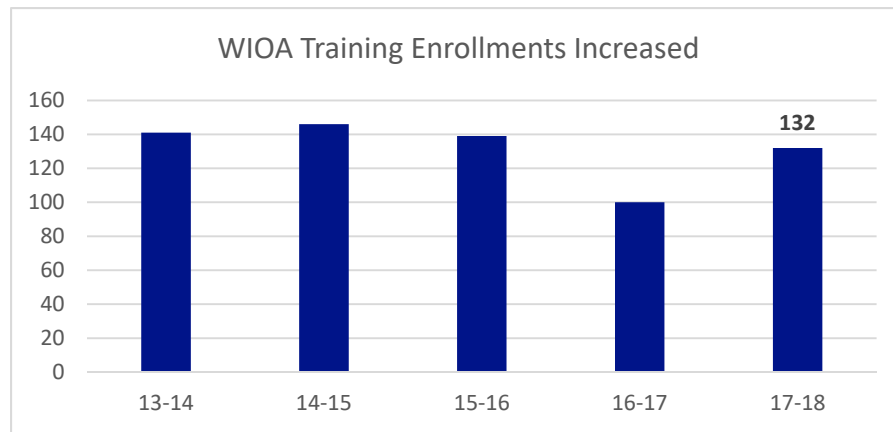
**Results:** Met.

In the 2017-2018 Program Year, 132 participants were enrolled into a training program, which is a 24% increase in enrollments from the previous contract year, and 101 students completed training and received industry-recognized credentials. The top five schools that students attended included the Career Technical Education Partnership, Cabrillo Community College, Truck Driving Institute, University of California Santa Cruz, and WASC Adult Education.

The program assisted 97 participants obtain employment in training related fields. About 57% of participants obtained employment in healthcare including Registered Nurses, Dental Assistants, Medical Assistants, and Radiology Technologist, and 20% obtained employment in transportation and logistics with Class A licenses. Other fields included information technology, business, and communications. The average wage was \$24.44/hour with a median of \$20.00/hour.

In 2018, Goodwill co-located WIOA services at Community Bridges Live Oak Center and Cabrillo Community College which expanded our outreach and allowed better access to employment and training services.

WIOA Program Year 7/2017-6/2018	
Goal	Outcome
117 individuals enroll into training programs 94 individuals complete training programs 93 placed into employment	132 individuals enrolled into training programs 101 individuals completed training programs 97 placed into employment



### *Culinary School*

**Purpose:** To prepare students for careers in the culinary arts and hospitality industry.

**Services:** Students participate in a 20-week culinary arts program while obtaining real world experience in providing catering and hospitality services at the Monterey Bay Event Center. Students obtain the ServSafe® Manager Certification upon completion of the program and job placement assistance to successfully enter the culinary arts field upon graduation.

**Eligibility:** Students must have a 5<sup>th</sup> to 8<sup>th</sup> grade reading and math level, and ability to lift 25 pounds and move freely around the kitchen.

**Accessibility:** Class size is limited to 8 students at a time. Enrollment will occur no later than 2 weeks after an opening occurs with appropriate application paperwork.

**Measurement of Success:** Achieve an 85% completion rate, and a 70% job placement rate.

**Results:** Partially Met as stated in the chart below.

The culinary school had 14 students enrolled in 2018 and increased enrollment by more than 50% from 2017. Our completion rate was lower compared to last year due to the low number of students expected to graduate (6) and several of these students had higher levels of disability which impacted attendance and on-time graduation. However, 100% of those that completed obtained employment at an average wage of \$14.67. The job placement rate is outstanding due to the network of employers the school has developed and the one-on-one job placement assistance each student receives. The school hosted more than 40 catered events providing real world work experience opportunities to students.

Culinary School Goals	2013	2014	2015	2016	2017	2018
85% of enrolled students graduate	100%	88%	99%	100%	75%	<b>67%</b>
70% of graduates obtain employment	71%	33%	64%*	100%	83%	<b>100%</b>
75% of graduates pass ServSafe® Certification	100%	98%	98%	100%	83%	<b>100%</b>

\*Rate that only includes individuals place within a year of graduation

\*\*Rate that includes individuals place a year after graduation

## Transitional Employment Programs

Transitional Employment programs provide work experience opportunities to individuals that allow them to get on-the-job-training and increase skills needed for competitive employment. Participants work in temporary jobs while receiving job coaching and job placement services. Transitional Employment programs include: Organizational Work Program (OWP), WorkAbility Program, and several Department of Rehabilitation (DOR) services.

### *Organizational Work Program*

**Purpose:** The Organizational Work Program (OWP) helps CalWORKs recipients gain work experience and learn new employment skills to prepare for unsubsidized employment.

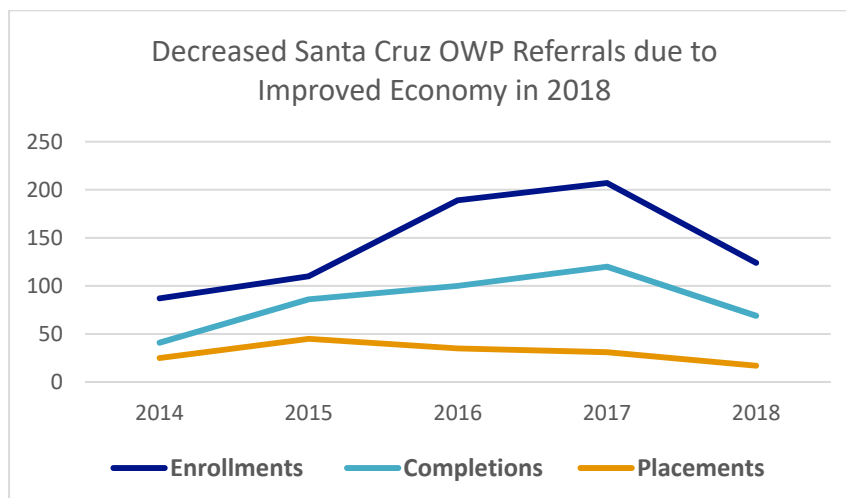
Overall, participants referred to OWP declined by 30% since 2017 due to the good economy that has decreased CalWORKs caseloads. The participants who are referred have higher barriers to employment and need significant wraparound supports in order to obtain and maintain employment such as housing, childcare, transportation, and mental health. This has impacted job placement rates which decreased by 35% since 2017. However, OWP in San Luis Obispo (SLO) was the exception, with a slight increase in referrals in the 17-18 program year. The OWP program in SLO is much smaller than the other counties, and the increase was due to receiving a larger share of the SLO County's diminishing caseload.

**Services:** Participants work in paid positions from 4 to 16 weeks. More than 75% of participants are placed in our Donated Goods Retail (DGR) program in a variety of positions including retail sale associates, processors, and administrative positions, such as human resource, finance, and workforce development positions. Others are placed at nonprofit partners in the community. Participants receive one-on-one job coaching and mentoring support, attend a week-long Job Retention Academy, and receive job placement services.

**Eligibility:** Must be receiving CalWORKs and referred by the County.

### **Organization Work Program (OWP) Santa Cruz**

In 2018, Goodwill served 132 participants, a decrease of 35% since 2017 due to low referrals because of a good economy and lower CalWORKs caseloads. The OWP STEP program provides three-month work experience for those seeking employment. The OWP TEMP program provides one-month work experience for those who need work-related activities as a "gap activity" (e.g. between school semesters) or who need to increase work participation rates. The below chart shows enrollment by calendar year.



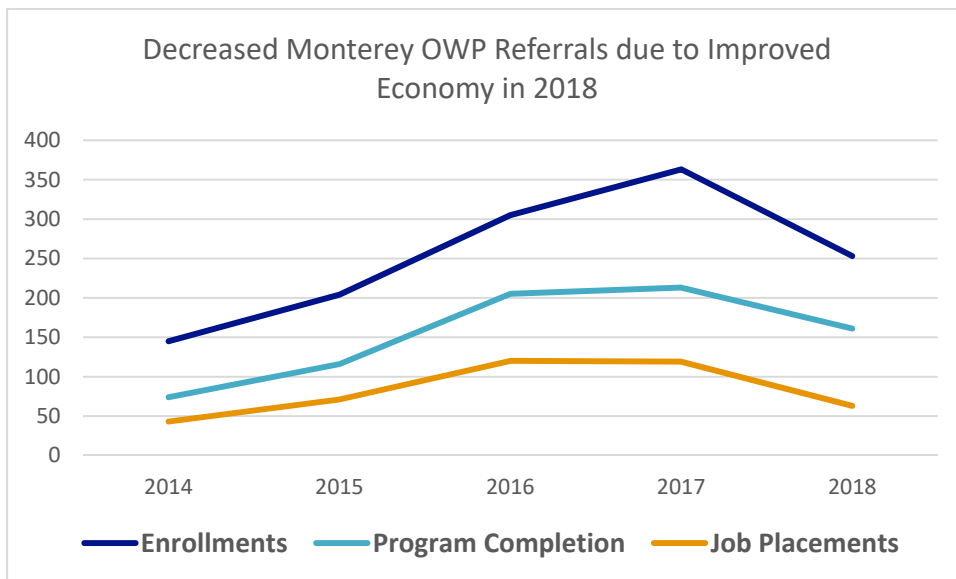
**Measurement of Success:** Meet Program Year 17 -18 contract outcomes including enrollments and completions.

**Results:** Met the majority of outcomes for STEP and TEMP Program Year (PY) 17-18 as shown by chart below. Overall, referrals dropped significantly from the previous program year. In 17-18 PY, Goodwill enrolled 95 into the program, which exceeds are enrollment goals, but was a 31% decrease from 16-17 PY (139). Low enrollments are due to the good economy and the low CalWORKs caseloads. Those referred had more significant of barriers to employment than in the past including mental health, homelessness, and a lack of transportation and childcare. Despite this, the STEP program had 51% completion rate, which is satisfactory based on the intensity of employment barriers. Job placement rates rely on our partner, the Community Action Board (CAB), as we refer those who complete for placement through CAB’s SmartHire program. TEMP received 70 referrals which exceeded our enrollment goals but below last year’s enrollment (80). TEMP had a better completion rate (69%) since more individuals can complete within 4 weeks compared to 12 or more weeks in STEP. The average wage of those who obtained employment was above minimum wage at \$12.51.

Santa Cruz OWP Program Year 7/2017-6/2018			
STEP		TEMP	
Goal	Outcomes	Goal	Outcomes
90 enrollments 55% will complete 85% satisfaction rate 70% of those that complete obtain employment	95 enrollments 51% completed 94% satisfaction rate 64% obtained employment (Ave Wage: \$12.51)	60 enrollments 75% will complete	70 enrollments 69% completed

**Organizational Work Program (OWP) Monterey**

The Monterey OWP served 253 participants in 2018, which is a 30% decline since 2017. However, Work Participation Rates (WPRs) rose strongly due to this program from 20% in 2014 to about 70% in 2018.



**Measurement of Success:** Meet Program Year 17-18 contract outcomes including enrollment and job placement, and work participation rates.

**Results:** Met or exceeded outcomes as shown by chart below. In program year 17-18, there were 278 enrollments (a 22% decrease from 16-17 program year) with a 55% placement rate, exceeding our job placement goals.

OWP Monterey Program Year 7/2017-6/2018	
Goal	Outcome
90% referrals placed into supported work in 48 hours 70% participants meet minimum work participant rate 50% obtain unsubsidized employment	100% referrals placed into supported work 65%+ met minimum work participant rate hours (still waiting on county data for final) 55% obtained unsubsidized employment (Ave wage: \$12.75)

### Organization Work Program (OWP) San Luis Obispo

In 2018, OWP San Luis Obispo served 49 individuals, which is a 36% increase from the 2017 calendar year. Referrals continue to increase in this county due to improved outcomes that the County is realizing with Work Participation Rates and additional Goodwill work sites that have opened up in San Luis Obispo, Paso, Atascadero, and Grover Beach.

**Measurement of Success:** Meet Program Year (PY) 17-18 contract outcomes including enrollment and placement rates.

**Results:** Met majority of outcomes as shown by chart below. For PY 17-18, we exceeded enrollment goals by 50% serving 45 participants. Completion rates were lower than goal but are in line with trends of completion rates in other counties due to significant barriers to employment. However, for those that completed, 95% obtained employment. This is a testament to the vocational plans and individualized coaching support provided to participants. About 35% were hired at Goodwill. A new work site in Paso Robles opened to allow more opportunity in North County.

OWP Monterey Program Year 7/2017-6/2018	
Goal	Outcome
Enroll 30 individuals 80% of participants will perform satisfactorily or above on job performance evaluations 60% will complete the program 70% will obtain employment within 90 days of exit	Enrolled 45 individuals 83% of participants performed satisfactorily or above on job performance evaluations 49% completed the program. 95% of participants found employment (Ave wage: \$12.01)

### WorkAbility

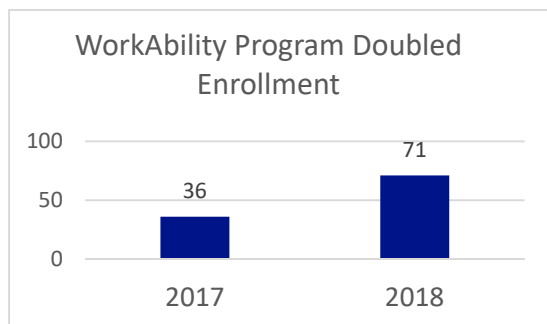
**Purpose:** The WorkAbility program gives high school students with disabilities customized, hands-on preparation for successful employment.

**Services:** Students work in paid, temporary positions at one of our retail stores in Santa Cruz and Monterey Counties and obtain job coaching through Goodwill Skills Trainers. Santa Cruz City School District, Pajaro Valley School District, and Santa Cruz County Office of Education, and the San Lorenzo Unified School District are partners in this work and plan to expand services.

**Eligibility:** Must be a high school student in the WorkAbility program.

**Measurement of Success:** Place all participants who seek work experience opportunities through our Donated Goods Retail program.

**Results:** Met. Goodwill placed every student interested in a work experience opportunity. In 2018, Goodwill served 46 students in Santa Cruz County and 26 students in Monterey County. Enrollment doubled from 2017. Goodwill intends to expand to San Luis Obispo County.



### Job Readiness and Placement Programs

Job Readiness and Placement Programs provide intensive case management and workshops on career coaching and job placement, and, in some cases, job retention. This includes Job Search Workshops, SSVF, Re-Entry Pathways to Employment program, and several DOR services.

#### *Job Search Workshops*

**Purpose:** Job Search Workshops (JSW) assists CalWORKs participants learn work readiness and job search skills to help participants obtain employment.

**Service:** Individuals participate in a 4-week workshop that offers comprehensive training in basic job seeking, understanding employer expectations, increasing job readiness and retaining employment once hired.

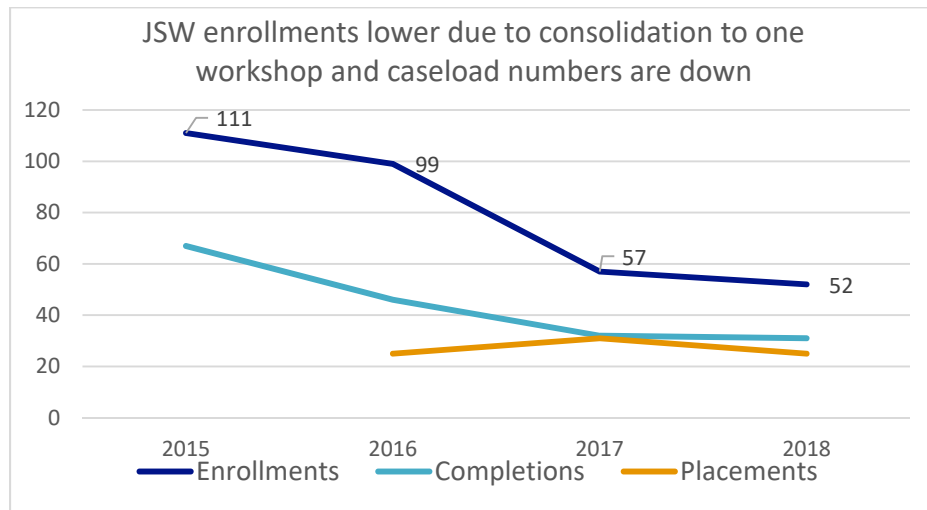
**Eligibility:** CalWORKs recipients referred by the County.

**Measurement of Success:** Meet Program Year 17-18 contract outcomes including program completion, increased job search skills, and job placement.

**Results:** Met majority of Program Year 17-18 results as stated in the chart below. JSW enrolled 52 individuals. Completion rates are 9% lower than goal due to higher barriers to employment; however, excluding those who dropped out of the first week of JSW (7 participants) due to their inability to work, it would bring the completion rate to 62%, much more in line with the completion goal. JSW achieved an 84% job placement rate, a testament to the individualized instruction and job coaching that each participant received to prepare them for employment. The average wage of those who obtained employment was \$13.64/hour, 24% above minimum wage.

Job Search Workshops Program Year 7/2017-6/2018	
Goal	Outcome
65% will complete	54% completed
100% increase job search knowledge	100% increased job search knowledge
65% of those who complete obtain employment	84% of those who completed obtained employment (Av Wage \$13.64/hour)

The following chart shows trends in numbers served since 2015 by calendar year. Enrollment has reduced in half due to consolidating two workshops offered in North and South County into one workshop offered in mid County (Capitola). This was due to the reduction in CalWORKS caseloads.



#### *Supportive Services for Veteran Families (SSVF)*

**Purpose:** Promote housing stability among low-income Veteran families who reside in or are transitioning to permanent housing.

**Services:** Provide job readiness workshops, skill assessments, access to vocational training, financial literacy, and job placement services to help veterans earn the income needed to maintain safe and affordable housing.

**Eligibility:** Homeless veterans in the SSVF program referred by the Community Action Partnership of San Luis Obispo (CAPLSO).

**Measurement of Success:** Provide employment readiness services to all referrals and achieve 50% placement rate.

**Results:** Met. In 2017-2018 Program Year, the SSVF program served 29 homeless veterans and placed 17 veterans into meaningful employment opportunities, which is a 58% placement rate exceeding our goals for the program year. The average placement wage was \$13.76/hour in fields including clerical, warehouse and logistics, marketing, and retail.

#### *Re-Entry: Pathways to Employment Program*

**Purpose:** Help individuals re-entering the community from periods of incarceration obtain employment.

**Services:** Provide job readiness workshops, individualized career plans, skill assessments, access to vocational training, and job placement services.

**Eligibility:** Individuals on probation referred by the SLO County Probation Department or inmates of the County Jail.

**Measurement of Success:** Met 17-18 PY contract outcomes including workshop enrollments, case management enrollments, and job placements indicated in the chart below.

**Results:** Met. The program enrolled 113 individuals referred from the Probation Department through the Pathways to Employment workshop series and one-on-one vocational case management. The program placed 61 individuals into employment (doubled from last program year) at an average wage of \$13.50/hour; delivered 45 workshops; and developed relationships with more than 40 employers open to hiring qualified candidates despite criminal records.

Starting in July of 2018, Goodwill expanded Pathways to Employment Program to the County Jail. From July to December of 2018, the program conducted 11 workshops, served 74 inmates, and placed 11 into employment at an average wage of \$14.81/hour.

Re-Entry Program Year 7/2017-6/2018 (Probation)	
Goal	Outcome
Serve up to 200 individuals	113 individuals were served
Serve up to 20 individuals on caseload	58 individuals served on caseload
90% increase job readiness knowledge	100% increased job search knowledge
40% obtain employment	84% of those who completed obtained employment (Av Wage: \$13.50/hour)

### *DOR Program*

**Purpose:** Help individuals with mental or physical disabilities be successful in the labor market.

**Services:** Provide work-readiness assessments, job placement, job coaching and job retention services.

**Eligibility:** Individuals must have documented disabilities and referred by the Department of Rehabilitation.

**Measurement of Success:** 90% of situational (work-readiness) assessments complete, at least 55% placement rate, and 80% job retention rate of 90-days.

**Results:** Met. All situational assessments completed their work-experience assignments, and 100% of those referred for employment services were placed into employment. However, this is out of a small caseload. The program recently starting in the spring of 2018 and has received 7 situation assessments, and 3 employment services in Monterey and San Luis Obispo Counties. We are building relationships with DOR counselors to increase referral rates and also launch a youth work-experience program in San Luis Obispo in partnership with DOR.

### Prosperity Platform

**Purpose:** To help people increase income, savings, and assets to reach their own goals and achieve economic self-sufficiency.

**Services:** Individuals, called Members, work in a long-term plan with a Prosperity Planner from two to five years. Members develop their own plan including actions steps to reach short-term and long-term goals. Members receive one-on-one financial coaching including budgeting, debt management, credit building, and access to financial services and products. Members also receive career counseling to advance careers and enroll in training programs. All Members have access to services within the Active Referral Network to successfully enroll and complete programs that increase financial capability.

**Eligibility:** Individuals must be ready and motivated to work on long-term goals.

#### **Measurement of Success:**

The Prosperity Platform measures progress on the Economic Mobility Continuum (the Continuum). The Continuum measures progress across different “life domains” that track the ability of individuals to improve their position in the labor market (increase income) and improve their financial capability (increase assets). The “life domains” for the labor market include: employment, education, training, and job retention. The “life domains” for financial capability include: income, money management, access to financial services, housing, and credit. Each life domain has benchmarks indicating levels of progress in ascending order: in-crisis, vulnerable, stable, save and thriving. Individuals move up a benchmark as they reach their own goals and improve their status in the relevant life domain.



Individuals are assessed upon program entry and are re-assessed every three to six months. Thus, the program can track changes in employment, income, financial services, credit, and savings over time.

Pilot Year outcomes include:

- Enroll 50 Members
- 75% move up a benchmark in at least one Labor Market life domain. This indicates people that are advancing their careers through employment and training to increase earning potential.
- 70% will establish a budget to improve money management and move up at least one benchmark in the Financial Capability life domains. This shows increased savings.
- 50% of unbanked participants become banked or increase use of financial products by moving up a benchmark in Access to Financial Services life domain. This shows more productive relationships with mainstream financial institutions
- Overall, 90% will move up at least one benchmark on the EMC within one year of enrollment.
- Launched the active referral network with 15-20 partners.

**Results: Met**

The Prosperity Platform is still early in the pilot year since we started the Monterey Prosperity Platform in June of 2018. Results below are from only **six months** of program data from July to December 2018 to show we are on track for our first year outcomes.

49 Members have been recruited. 47% of Members are Goodwill employees and 53% are Members from WIOA and partners in the Active Referral Network. Out of 49 Members, 29 Members (60%) have been in the program for at least three months. Our outcomes track Members who have been in the program at least three months so they have time to identify and accomplish some goals.

Prosperity Platform	
Year Goal	Mid-Year Outcome
Recruit 90 Members	49 Members recruited as of December 2018
Start Active Referral Network with 15 partners	Launched two active referrals networks in Monterey and Santa Cruz with 20 partners in partnership with United Way of Monterey County, Santa Cruz Workforce Development Board, Santa Cruz Community Foundation
75% increase their position in the labor market and improve earnings after one year of enrollment (move up at least one benchmark in labor market domains)	30% got a job or a job promotion. This will increase as some Members are enrolled in training programs and will complete in 2019. Also note that 70% of Members already had a job upon enrollment.
80% establish and monitor a budget to improve money management	60% have established a budget and are realizing savings
50% become banked or increase use of financial products	35% have opened and utilized checking or savings accounts, direct deposit, or retirement accounts.
90% move up at least one EMC benchmark after one year of enrollment	59% have already moved up at least one benchmark on the Economic Mobility Continuum

## Economic Mobility Continuum



Employment & Education					Financial Capability & Asset Building					
Employment	Education	Training (within field)	Job Retention	Income	Budgeting and Saving	Access to Financial Services	Debt Management	Credit	Housing	
Thriving	Full-time work at or above the self-sufficiency wage with benefits.	Post secondary degree.	Obtained industry recognized credential.	Employed over 12 months.	Above 250% of poverty adjusted for family size.	Household has discretionary funds to save. Has between 1 and 3 months of living expenses saved.	Active use of more advanced financial services such as restricted savings (e.g. retirement account, IRA), and traditional loans.	Balance paid in full. Current on payment plans. No outstanding debt other than mortgage, education, or car loans.	720+	Housing of choice such as home ownership or nonsubsidized rental housing.
Safe	Full-time work below self-sufficiency wage with benefits.	Post high school education or some college.	Completed training program leading to industry recognized credential.	Employed between 6-12 months.	Between 200%-249% of poverty adjusted for family size.	Household has discretionary funds to save. Has less than 1 month of living expenses saved.	Opened and maintained both a checking and savings with use of direct deposit.	More than minimum paid off and current on payment plans.	690-689	Safe and secure nonsubsidized, affordable choices but limited due to moderate income.
Stable	Full-time work below self-sufficiency wage with no benefits.	GED or high school diploma.	Enrolled in training program leading industry recognized credential.	Employed between 3-6 months.	Between 150%-199% of poverty adjusted for family size.	Able to pay all bills to support basic living expenses; expenses do not exceed income.	Opened and maintained checking account in good standing (e.g. minimum balance maintained, no overdrafts).	Minimums being paid and payment plan in place.	630-689	Safe and secure subsidized rental, Section 8, or public housing.
Prevention Line					Prevention Line					
Vulnerable	Part-time, seasonal, or temporary employment.	No GED or high school diploma, but can pass basic reading and math tests (e.g. TABLE).	Has limited marketable skills.	Employed less than 3 months.	Between 101%-150% of poverty adjusted for family size.	Unable to pay some bills to support basic living expenses; expenses exceed income.	Under-banked. Has a mainstream financial account but has misused account (e.g. overdraft fee history) and/or also using cheque cashers, payday loans, car title loans, or pawnbrokers.	Debts exceed ability to pay. Regularly late on payments.	529-629	Transitional housing. Eviction notice/Imminent risk of losing housing.
In-Crisis	Unemployed.	Cannot pass basic math and reading tests (e.g. TABLE).	Has no marketable skills.	Employed less than 1 month.	100% or below of poverty adjusted for family size.	Unable to pay most bills to support basic living expenses; expenses exceed income.	Un-banked with no access to mainstream financial institutions	Unable to make any payments. Judgements. Garnishments.	Unscored or below 529	Temporary shelter. Homeless.

## 2018 Outcomes Summary

PROGRAM ENROLLMENT SUMMARY	SERVICE	REGION	2015	2016	2017	2018
Job Search Workshop	Light Touch	Santa Cruz County	111	99	57	52
Organizational Work Program Santa Cruz	High Impact	Santa Cruz County	82	122	122	78
Work Experience (WEX)	Light Touch	Santa Cruz County	60	52	23	0
High School Workability Program	Light Touch	Santa Cruz County			13	46
TEMP	High Impact	Santa Cruz County	28	67	85	54
Cabrillo MakerSpace/Students	High Impact	Santa Cruz County				55
Cabrillo MakerSpace/Business Outreach	Business	Santa Cruz County				37
Prosperity Platform	High Impact	Santa Cruz County				24
Financial Counseling(Light Touch)	Light Touch	Santa Cruz County				27
School of Cosmetology Enrollments	High Impact	Santa Cruz County	152	63	30	0
Ticket to Work Enrollments	Light Touch	Santa Cruz County	4	2	0	0
Santa Cruz Career Center	Light Touch	Santa Cruz County	501	720	648	382
Watsonville Career Center (AJCC)	Light Touch	Santa Cruz County	467	2942	2950	3167
WIOA Training	High Impact	Santa Cruz County	59	121	173	268
AJCC On the Job Training (OJT) Enrollments	High Impact	Santa Cruz County	3	14	7	8
Business Services (# of Job Orders)	Business	Santa Cruz County	25	51	32	16
Computer Evaluation: PreValuate (Individuals Assessed)	Light Touch	Santa Cruz County	369	216	72	137
Job Fairs Santa Cruz County (# of participants)	Light Touch	Santa Cruz County	1776	308	103	267
Free Tax Preparation Program(VITA & MyFreeTaxes)	Light Touch	Santa Cruz County	310	427	15	7
<b>TOTAL SANTA CRUZ COUNTY</b>			<b>3947</b>	<b>5204</b>	<b>4330</b>	<b>4625</b>
Salinas Career Center	Light Touch	Monterey County	916	1245	809	1690
Organizational Work Program Monterey County	High Impact	Monterey County	204	305	363	253
High School Workability Program	High Impact	Monterey County			23	26
Prosperity Platform	High Impact	Monterey County				25
Financial Counseling (Light Touch)	Light Touch	Monterey County				29
DOR/Situational Assessments	Light Touch	Monterey County				7
DOR/Employment Services	High Impact	Monterey County				1
Culinary Program	High Impact	Monterey County	13	8	14	13
Job Fairs Monterey County	Light Touch	Monterey County	618	739	680	750
Computer Evaluation: PreValuate (Individuals Assessed)	Light Touch	Monterey County				
Free Tax Preparation Program(VITA & MyFreeTaxes)	Light Touch	Monterey County	207	27	35	33
<b>TOTAL MONTEREY COUNTY</b>			<b>1958</b>	<b>2324</b>	<b>1924</b>	<b>2827</b>
San Luis Obispo Career Center (AJCC)	Light Touch	San Luis Obispo	1473	2371	1914	2347
AJCC Intensive Enrollments (Career Services)	High Impact	San Luis Obispo	370	87	151	0
AJCC: Individual Training Account Enrollments	High Impact	San Luis Obispo	53	38	32	0
AJCC: On the Job Training Enrollments	High Impact	San Luis Obispo	31	12	5	0
Supportive Services for Veterans and Families (CAPSLO)	High Impact	San Luis Obispo	90	57	34	42
Organizational Work Program San Luis Obispo County	High Impact	San Luis Obispo	49	17	36	49
Re-Entry Probation Program (AB109)	High Impact	San Luis Obispo		65	144	134
Re-Entry Jail Program	Light Touch	San Luis Obispo				79
DOR/Situational Assessments	Light Touch	San Luis Obispo				0
DOR/Employment Services	High Impact	San Luis Obispo				2
PAPAS	Light Touch	San Luis Obispo	0	10	11	0
Pacific Gas & Electric: Essential Ability Skills (Attendees)	Light Touch	San Luis Obispo	60	71	55	0
Job Fairs San Luis Obispo (#of Participants)	Light Touch	San Luis Obispo	706	20	400	0
Free Tax Preparation Program(VITA & MyFreeTaxes)	Light Touch	San Luis Obispo	134	80	127	0
<b>TOTAL SAN LUIS OBSIPO COUNTY</b>			<b>2966</b>	<b>2828</b>	<b>2909</b>	<b>2653</b>
<b>TOTAL ENROLLMENTS</b>			<b>8871</b>	<b>10356</b>	<b>9163</b>	<b>10104</b>
<b>PLACEMENT SUMMARY</b>			<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>
Light Touch Universal Services			7802	9386	7969	9087
Intensive Programs			1044	919	1162	964
Business Services			25	51	32	53
<b>Total*</b>			<b>8871</b>	<b>10356</b>	<b>9163</b>	<b>10104</b>
Total Served Santa Cruz			3947	5204	4330	4625
Total Served Monterey			1958	2324	1924	2827
Total Served San Luis Obispo			2966	2828	2909	2653
<b>Total Served for Santa Cruz, Monterey and SLO Counties</b>			<b>8871</b>	<b>10356</b>	<b>9163</b>	<b>10104</b>
Placement Data						
# placed External (unsubsidized)			287	457	418	667
# placed Internal (unsubsidized)			285	47	95	48
# placed Internal (subsidized)			0	541	534	434
Total Placed through WDS			572	1045	1045	1149
# of GCC New Hires				309	748	280
<b>Total Placements</b>			<b>572</b>	<b>1354</b>	<b>1793</b>	<b>1429</b>

# Demographics Summary

2018 Demographic Data for WORKFORCE PROGRAMS																	
Program	County	Gender		Ethnicity								Age					
		Male	Female	White	Black	American Indian	Asian	Hawaiian	Multi-	Hispanic	Unknown	% 16-24	% 25-34	% 35-44	% 45-54	% 55+	Unknown
America's Job Center of California (WIOA)	Santa Cruz	40%	60%	51%	0%	0%	0%	0%	0%	49%	0%	17%	40%	19%	13%	11%	0%
Cabrillo MakerSpace	Santa Cruz	77%	23%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	100%
Highschool Workability Program	Santa Cruz	69%	28%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	100%
Job Search Workshop	Santa Cruz	18%	82%	34%	0%	0%	0%	0%	0%	60%	6%	12%	52%	26%	10%	0%	0%
Organizational Work Program (OWP)	Santa Cruz	14%	86%	42%	4%	1%	0%	0%	0%	54%	0%	13%	57%	21%	8%	0%	0%
Temporary Work Program (TEMP)	Santa Cruz	33%	67%	26%	0%	2%	0%	0%	0%	52%	20%	15%	54%	24%	7%	0%	0%
Culinary School	Monterey	75%	25%	42%	0%	0%	0%	17%	0%	42%	0%	17%	50%	8%	17%	8%	0%
Highschool Workability Program	Monterey	69%	28%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	100%
Organizational Work Program (OWP)	Monterey	22%	78%	10%	8%	0%	2%	1%	0%	72%	7%	12%	49%	27%	9%	2%	0%
CAPSLO SSVF	San Luis Obispo	87%	13%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	100%
SLO AB109	San Luis Obispo	72%	28%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	100%
SLO Jails	San Luis Obispo	62%	38%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	100%
Organizational Work Program (OWP)	San Luis Obispo	30%	70%	58%	3%	0%	0%	0%	0%	38%	0%	16%	23%	35%	16%	3%	6%
<b>TOTAL</b>		<b>51%</b>	<b>48%</b>	<b>20%</b>	<b>1%</b>	<b>0%</b>	<b>0%</b>	<b>1%</b>	<b>0%</b>	<b>28%</b>	<b>49%</b>	<b>8%</b>	<b>25%</b>	<b>12%</b>	<b>6%</b>	<b>2%</b>	<b>47%</b>