



Stakeholder-Centered Economic Mobility Grantmaking Design and Development

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Overview of the Process

Between October 2023 - June 2024, Equitable Cities Consulting and Anavi Strategies conducted a stakeholder-centered process to inform the focus and design of a new economic mobility grantmaking approach, proposed as part of the William Penn Foundation's revised 10-year strategic plan. The work started with quantitative research and analysis, followed by an in-depth and iterative stakeholder engagement process, to ensure robust input and vetting. The stakeholder feedback compiled in this summary surfaced numerous recurring themes and recommendations for the William Penn Foundation to consider in a grantmaking strategy.

Phases of Work

Phase I: Landscape research and quantitative data analysis - October - November 2023

Phase II: Stakeholder engagement and analysis - November 2023 - April 2024

Phase III: Grant program design and refinement prior to launch - April - June 2024

Stakeholder Engagement Overview & Topics Discussed

Over a six-month period, Equitable Cities Consulting and Anavi Strategies spoke to more than 125 workforce stakeholders. In a series of interviews, listening sessions, and focus groups, large institutional partners*, employers, and non-profit service providers were asked to provide input on draft program goal and strategies, the contents of which evolved throughout the process as a result of the feedback received, as well as reflect on the following:

- Strengths and challenges within the current workforce system
- Which investments could be the most impactful to reduce systemic barriers and improve job retention
- Best practices and lessons learned as recipients of grants and philanthropic funds

Current job-seekers participating in Career Link programming were asked to reflect on:

- What's working well in job training and work readiness programs
- Barriers to retaining a job for 12+ months
- Investments that could help improve the effectiveness of job training and work readiness programs

*Large institutional partners receive public funding and include the Community College of Philadelphia, the Philadelphia School District, Philadelphia Works and the City of Philadelphia.

Stakeholder Engagement Key Themes: Existing Strengths in Philadelphia's Workforce System

Philadelphia's workforce "ecosystem" consists of institutional partners (like the Community College of Philadelphia, Philadelphia Works, the School District of Philadelphia, and the City of Philadelphia), employers, workforce training providers, and social service organizations.

The ecosystem is perceived as high-functioning and a strength:

- There is a collective desire for and willingness to identify workforce-related solutions
- Meaningful collaborations are already in progress, and
- There are a number of successful programs and partnerships to build upon

Stakeholder Engagement Key Themes: Barriers that Prevent Employment & Retention

Institutional partners, employers, and service providers all identified similar systemic barriers that prevent jobseekers from completing job training, securing employment, and retaining a job for 12+ months.

Barriers that impact jobseekers' ability to find and retain employment include:

- Availability and cost of childcare
- Transportation
- Becoming a licensed driver
- Vital and necessary documents (social security card, birth certificate, etc).
- Prior conviction or justice-involvement

Stakeholder Engagement Key Themes: Barriers that Prevent Employment & Retention

Job training programs are high barrier without a stipend that addresses living expenses.

Jobseekers often struggle with the “benefits cliff” of rapidly losing eligibility for benefits once they obtain a job.

Once employment has been secured, supporting individuals with essential costs in the period before their first paycheck and during the initial employment period is critical.

In addition, new employees often struggle to navigate workplace culture and require increased professional skills (*networking skills, adapting to the workplace, and navigating organizational culture and expectations*) to thrive over time. Post-employment support such as coaching and case management are seen as important investments.

Stakeholder Engagement Key Themes: Barriers that Prevent Employment & Retention

Non-profit organizations that provide supportive services have observed that many employers are not prepared to work with:

- Individuals with limited English proficiency
- Individuals who are justice-involved or reentering society after incarceration
- Individuals that need to manage numerous challenges outside of work that might require flexibility, accommodations, etc.

Helping employers gain more knowledge about these populations will help improve both retention and employee experience.

Stakeholder Engagement Key Themes: Investments to Ensure Long-Term Family Sustaining Employment

Regarding investments, the majority of those interviewed mentioned paid on-the-job training, continuous skill building, and flexible wrap-around support for up to 18 months after employment.

The nature of wrap-around supports will vary by person and often includes:

- Childcare, transportation, obtaining a driver's license, mental health care, and housing
- Addressing the sudden ineligibility for publicly funded services after job placement, known as the "benefits cliff"
- English as a Second Language (ESL) classes, adult literacy, and numeracy training
- Continuous case management and support after job placement
- Increasing job opportunities in more industries that pay a living wage and offer a longer-term career path

Stakeholder Engagement Key Themes: Investments to Ensure Long-Term Family Sustaining Employment

Systems partners specifically elevated the need to invest in pre-apprenticeship programs, on-the-job training, and organizational capacity building.

Additionally, given the size of the workforce ecosystem and the existence of systemic barriers that impact all partners involved, the following investments may yield a high return on investment:

- Regular convenings to improve coordination of services and advocacy goals
- Efforts to achieve policy change in the areas of career and technical education, workforce development, and social services/benefits

Recommendations for the Grantmaking Process

- ❑ Ensure core values are embedded in the grantmaking process in the following ways:
 - Transparency: Utilize a publicly-accessible RFP process, host a public Q&A session, and provide details on expectations and process using the website and direct communication to applicants.
 - Equity & Inclusion: Actively invite grassroots and historically disenfranchised organizations to apply, and provide additional supports for first time applicants.
 - Clarity: Define key terms, document the process and expectations for applicants and grantees, and provide eligibility criteria (including a scoring rubric) as part of the application instructions.

- ❑ Design a multi-step process that starts with a low-barrier call for ideas, and offer a Q&A session.
 - Require more time and capacity, via an RFP and site visit, only for organizations that are selected to move forward in the process.

- ❑ Incentivize collaboration between organizations, and intentionally fund proposals that involve collaborations across two or more organizations.



Appendices



Stakeholder Interviewees

Public Sector Partners

- Dr. Vance Gray, CCP
- Patricia Blumenauer, Philadelphia Works
- Gianna Grossman, City of Philadelphia
- Melodee Jackson, School District of Philadelphia

Nonprofit Workforce Training Providers

- Cynthia Figueroa, Waleska Maldonado, Heather Keafer & Mary Marquart, JEVS
- Malik Brown, Graduate! Philadelphia
- Chad Rountree and Denali Lander, Propel America
- Wendy-Anne Roberts-Johnson, Philadelphia Youth Network

Funders

- Catie Wolfgang & Rishaun Hall, Pew Charitable Trusts
- Adrian Esquivel, Chicagoland Workforce Funder Alliance
- Jac Rivers, JP Morgan Chase
- Kristina Wahl, Barra Foundation

Employer Perspective

- Sarah Steltz, Nicki Pumphrey & Rennia Rodney, Chamber of Commerce for Greater Philadelphia
- Barbara Allen, Southeast PA Manufacturing Alliance
- Danae Mobley, One Philadelphia
- Joseph Welsh, Pennsylvania Workforce Development Board

Worker-Centered Workforce Development

- Ashley Putnam, Federal Reserve Bank
- Mike O'Bryan, Human Nature
- Daniel Bauder, AFL-CIO

Wrap-Around Supports:

- Joan Broadhead, Community First Fund
- Jeran Crawford & Joshu Harris, Office of Criminal Justice & Public Safety, City of Philadelphia
- Michael Butler and Martize Tolbert, Fountain Fund
- Dr. Dash, Self Incorporated

Focus Group and Listening Session Participants

COALITION & ALLIANCE LISTENING SESSIONS*

- Philadelphia Workforce Professionals Alliance (45+ participants)
- Philadelphia Immigrant Employment Coalition | 8 Participants attended representing 4 organizations (HIAS, Welcoming Center, Beyond Literacy, Office of Immigrant Affairs and Commerce)
- Re-entry Coalition

PUBLICLY FUNDED SYSTEM PARTNER FOCUS GROUP

- Philadelphia Works
- Community College of Philadelphia
- School District of Philadelphia
- City of Philadelphia Commerce Department, Workforce Unit

NON-PROFIT FOCUS GROUP

- HOPE Works
- Hire Philly
- OIC Philadelphia
- Impact Services (Career Link NW Administrator)
- Launch Pad Philly
- YouthBuild Philly
- West Philadelphia Skills Initiative

- Achievability
- First Step Staffing
- Nationality Services Center

JOB-SEEKER FOCUS GROUP

- 9 Career Link clients facing barriers such as childcare, benefits cliff, prior injuries
- Transitioning from low-paid “menial work”; seeking a new career and industry that pays a livable wage
- Several interested in self-employment, but don’t know where to start

EMPLOYER FOCUS GROUP

- Superior Solar Design
- Grid Alternatives
- Integral Molecular
- Chubb
- Philadelphia Gas Works
- Rodriguez Consulting
- Rhoads Industries
- Empower Construction
- Remark Glass

*Listening sessions were conducted with larger audiences. Focus groups were highly customized with more structured facilitation and a smaller number of participants per group.

Initial Problem Statements: Findings from Quantitative Research

- ❑ Economic mobility in Philadelphia is highly impacted by readiness of the labor market, not necessarily always a lack of job supply
- ❑ Some Philadelphia residents are not qualified for open positions that offer increased pay and benefits due to a lack of skills, training, or supportive services that address barriers to training and employment
- ❑ Low-wage jobs, coupled with the loss of benefits triggered after earning a certain wage, do not allow for financial independence, nor economic mobility
- ❑ Solving the workforce gap requires more and deeper engagement of employers
- ❑ In Philadelphia, the role of workforce development systems and employer talent solutions lacks clarity and a coordinated approach to improving outcomes to better meet the needs of employers and workers
- ❑ Financial literacy is low in the region, and asset-building skills (such as growing savings and investments), should be integrated into comprehensive workforce development strategy

The above problem statements were drawn from quantitative data analysis, and were the basis for further qualitative analysis conducted via interviews, listening sessions and focus groups to better understand strengths, challenges, and opportunities.

Company Overview

Equitable Cities Consulting is a certified woman-owned enterprise that provides strategic advisory services to governments, nonprofits, philanthropy, and the private sector related to economic development that leads to more equitable cities. Equitable Cities Consulting services include stakeholder engagement, process facilitation, policy and program implementation, research, and planning.

Anavi Strategies is a certified woman- and minority-owned public impact consulting firm that works with mission driven leaders to plan, research, analyze, and evaluate. Since 2020, Anavi Strategies has been providing strategic planning, implementation support, and evaluation services to nonprofit organizations and government agencies both in the Philadelphia region and nationally.

