

SKILLWORKS INITIATIVE

YEAR UP- FINANCIAL SERVICES PARTNERSHIP

MAY 2013

INTRODUCTION

As a result of its participation in SkillWorks, Year Up has undergone a number of organizational and programmatic changes, some of which have directly advanced SkillWorks-funded activities while others have implications for the national Year Up network. This year's SkillWorks annual evaluation report examines the evolution of Year Up's core operational model from one that focused on direct services with job placement as the primary participant outcome to one that increasingly integrates multi-year services, policy advocacy, and systems change outcomes in order to facilitate career advancement for disconnected young adults. Year Up's new approach, *Long-Term Graduate Success (LTGS)*, is the culmination of this shift and reflects the organization's commitment to ensuring that its graduates have ongoing access to a range of services and supports that are designed to help them progress and advance along clearly defined career paths in the financial services industry.

The strategies and steps undertaken by Year Up offer considerable lessons for practitioners as well as for Year Up National, which has incorporated LTGS into its long-term strategic plan. The evaluation is designed to capture process outcomes and other qualitative information that documents Year Up's progress in shifting to the LTGS framework. It is organized along three broad lines of inquiry that are designed to capture and analyze changes in Year Up's program and organization: Organizational Restructuring; Employer Engagement; and Postsecondary Education. Systems change activity and issues related to sustainability – two important SkillWorks objectives – are addressed within this framework as applicable. Specific participant outcomes are not reported in this evaluation. However, deliverables and outcomes that are germane to process outcomes associated with LTGS are discussed. To this extent, the results of a survey of Year Up participants and alumni who participated in math basic skill training or received career coaching are reported.

ORGANIZATIONAL RESTRUCTURING

Background: Organizational Challenge and Restructuring Process

Year Up received funding from SkillWorks in 2009 to focus on strengthening its core programs in order to help entry-level employees advance toward mid-level positions in financial services. SkillWorks awarded a planning grant for the first year so that the organization could refine its strategy, solidify its partnerships with employers, undertake career pathways analyses, develop a menu of career development and support services, and identify multi-year outcomes targets. The final product was an implementation plan. Although Year Up is recognized as a high-performing organization with a proven model for moving disconnected young adult into good jobs, it

became apparent during the planning phase that its existing organizational structure (as well as its direct service model, methods of employer engagement, and limited organizational experience with systems change initiatives, all discussed below) posed challenges for implementing the SkillWorks grant.

At the time of the planning grant, Year Up was already operating at capacity. The grant was being managed under its Career and Alumni Services division, which at the time was one of seven first line departments reporting to the Year Up's executive director (shown in the organizational chart in Appendix A). In addition to the director, the department was comprised of an Alumni Coordinator, a Higher Education Specialist, and a Career Development Specialist, who focused on placing new graduates. The primary focus of the grant was on recent graduates. A small cohort of older alumni who graduated several years prior were also enrolled during the planning phase, but the long-term success of these mid-career alumni was not a high priority at the time. As the work under the SkillWorks grant proceeded, the value of providing services to a range of alumni took on greater importance, particularly in light of an expressed demand for advancement services by alumni.

By 2010, the first year of implementation, Year Up began restructuring its organization. The SkillWorks grant was shifted out of Career and Alumni Services and placed under the senior director of programs (Robin Nadeau), whose responsibilities expanded during this period to include overseeing multiple Year Up divisions beyond those already under her purview. The Career and Alumni Services unit was also placed under her direction and several staff positions refocused to exclusively work on SkillWorks-funded activity. The expectation was that the restructuring would facilitate greater cross-department integration. Although restructuring was not proposed as a SkillWorks-supported activity, SkillWorks later accepted it as part of Year Up's systems change agenda.

Progress proved quite challenging during this period as the senior program director tried to manage multiple departments, balance competing priorities, refine the work plan for the SkillWorks-funded activities, and embed advancement activities within an organizational structure that was in flux. Some divisions were slow to embrace the idea of incorporating college readiness and career advancement activities into Year Up's core curriculum. The learning communities (the instructional units responsible for carrying out Year Up's core program), for example, were especially wary about trying to address problems associated with low basic skill levels and the logistical challenges associated with adding new programs to Year Up's highly structured curriculum. Staff meetings proved to be insufficient vehicles to convey the importance of SkillWorks and generate organization-wide buy-in. However, because every Year Up employee advises participants, it was critically important that they were able to convey the value of career advancement to students and alumni with conviction and enthusiasm. The senior program director engaged in considerable one-on-one meetings with key staff and learning community members to build internal support. In addition, career advancement and related sub-topics were increasingly included on the agendas of in-service trainings, organizational development meetings, and staff retreats.

As the reorganization continued in 2011, advancement took on greater importance to Year Up's overall mission. Long-Term Graduate Success was adopted as a core component nationally with Boston modeling the approach for other Year Up affiliates. In order to focus more attention on the SkillWorks grant and LTGS, the senior program director relinquished oversight of other Year Up departments to a new senior director for programs. In early-2012, the Career and Alumni Services department's director and most its staff were placed under the senior director of programs, whose title was changed to Senior Director of Long-Term Graduate Success/SkillWorks. The current organizational chart is included in Appendix B.

Building the Team and Cross-Departmental Alignment

⇒ Through a combination of new hires, upgraded positions, and refocused job descriptions, the LTGS/SW team significantly enhanced staff focus on alumni advancement needs.

The emphasis on long-term graduate success required Year Up to enhance its staff capacity. The initial restructuring involved modifying roles and job responsibilities of existing staff. However, additional capacity was required, which led to the hiring of additional staff. A Graduate Success Coordinator (Lindsey O'Hara) was hired to manage a tutoring program, provide support to the newly hired Career Coach and the employer advisory group (discussed below), and manage the data collection and reporting. The Alumni Coordinator's position (held by Serghino Rene), which focuses on providing support to and collecting data on alumni who have been out of the program for one year or more, was upgraded to Alumni Relations Coordinator. This position also supports the Year Up Boston Alumni Association (YUBAA), which had been dormant until 2012 but as of 2012 was still in the process developing a strategic focus. A new Higher Education Specialist position was created in 2010 and filled by Year Up's outgoing Vista volunteer, Nicole Hart. The position was expanded under the reorganization to include administering a number of pilots and new programs aimed at enhancing college readiness and increasing matriculation. The Director of Career and Alumni Services/Graduate Success (Smajl Cengic) continues to work across the various LTGS functions, working closely with staff who provide coaching and alumni support, higher education and other services, as well as focusing on mid-career alumni. This included taking on an expanded career coaching caseload.

Three additional changes have been critical to the progress Year Up made in 2012. The Career Development Manager (Davo Jefferson), who is responsible for placing graduates in their first job, was transferred to Year Up's Internship Team, which markets Year Up to employers and secures internship slots. A Career Coach (Mark Estrada) was added to the LTGS team in May of 2012 to facilitate delivery of an expanded portfolio of career coaching services to alumni. An Influence Manager was hired to advance Year Up's policy and systems change agenda. The changes reflect modifications Year Up made to its theory of change that refined the definition of alumni and identified which organizational unit has responsibility for which cohort. Presumably, the segmentation of alumni also will help Year Up customize its advancement services based on factors such as age, career plans, work-life responsibilities, and educational needs. These positions and the changes to how alumni are categorized are discussed below.

➤ **Year Up changed the job responsibilities for the career development manager and the internship team, increased the focus on the conversion of internships to permanent positions for Year Up graduates, and deepened relationships with employers.**

Prior to the SkillWorks grant, the career development manager worked with graduates for the first four months after graduation, in keeping with Year Up's four-month retention target. Although Year Up adopted a one-year retention target in the first year of the SkillWorks grant, until the restructuring occurred other members of the LTGS team provided services to alumni once they passed the four-month mark. Once the career development manager was moved to the internship team, Year Up decided to place responsibility for one-year retention within this department and increase the length of time that alumni services are provided by the internship/career development team from four months to one year. After one year, alumni fall under the purview of the LTGS team.

An additional outgrowth of Year Up's revised theory of change is to increase the rate of conversions from internships to employment. Currently, about one-third of Year Up's interns move into formal employment upon graduation. Besides the effects of unemployment, those who do not immediately convert often experience lower wages once they do secure employment. Year Up will be taking several steps to increase the level of conversions, including working more closely with employers to proactively identify entry-level jobs.

The focus on career development has led to a shift in perspective on the part of the internship team, which was at first quite protective of its employer relationships and thought soliciting jobs and support for alumni could occur only at the expense of internship slots. This has not been the case. In fact, co-locating support for new alumni and the job development functions under the internship team provides better continuity. The career development manager, who works with both the LTGS and the internship teams, plays a pivotal role bridging the two teams.

With the emphasis on converting interns to permanent employees, the value of LTGS as a retention strategy for employers became clearer. To assist with increasing conversions, Year Up will work with employers to address labor force needs more strategically and to identify job opportunities and resources within companies that could benefit both new and mid-career alumni. Acknowledging this strategy as a benefit to employers is an especially important shift for companies that have tended to view their engagement with Year Up as community service as opposed to workforce development.

Restructuring the internship team also improved accountability. In addition to securing internship slots, the team is now responsible for ensuring that 85 percent of graduates are placed and retained in full-time jobs within four months of graduation. The team is also placing more emphasis on job quality, recognizing that graduates placed in good jobs tend to lead to better outcomes and higher educational and career advancement aspirations. In 2012, the internship team refined its operational plan to include considerably more cross-departmental collaboration, new outreach targets, and revised performance measures.

➤ **Year Up's hiring of a career coach in 2012 significantly increased the organization's capacity to support alumni.**

In late 2011, Year Up hired a youth development consultant to conduct a series of career development workshops and provide career coaching. The positive response to the coaching prompted Year Up hire a full-time career coach as part of the LTGS/SW team. They were fortunate to identify someone with industry experience, hiring Mark Estrada in 2012. He is focused on providing a comprehensive set of alumni services designed to support their professional development, higher education, and career advancement goals. Services include developing individual career plans, providing one-on-one and small group counseling, arranging mentorships, case management and other support services, and connecting alumni to a range of employer-based resources. Currently, the career coach has a caseload of approximately 90 Year Up alumni (including some non-SkillWorks participants) and is working with four employer partners. About 87 percent of the caseload is employed by State Street Bank, which has embraced the career coaching role wholeheartedly by providing on-site office space and a staff liaison (as discussed in the Employer Engagement section below).

To better understand the value that participants see in the new career coaching services, the evaluation team conducted an online survey of individuals who have worked one-on-one with the coach. The survey yielded 24 responses (a 71 percent response rate). In general respondents found the sessions useful as related to job performance (67 percent or 16 found it very useful, 33 percent or eight found it useful). Individuals found it useful because the coach pushed them to do their best, reiterated best practices for job performance, and helped them navigate career pathways. The coach also helped them plan for the future at work and school, prepare for interviews, manage relationships with supervisors, and achieve a better work-life balance. Work with the coach was also considered quite useful for long-term career planning. In fact, 71 percent found the one-on-one counseling very useful for long-term career aspirations, and 25 percent found it useful. In describing how it was useful, respondents said that the coach: helped them understand their options, such as four-year college, two-year college, specific training, or employment opportunities; provided expertise and advice (i.e., suggested meeting with school representatives rather than just applying online); and helped them set goals, stay motivated, and build self-confidence. Participants' comments reinforce the value of the service: "I do not even know how we got along before Mark Estrada came on board," said one participant. Another individual commented, "I now know where I want to be in my long-term career and this has impacted how I take responsibility and engage in more work at my job."

The challenge to coaching success appears to be participants' persistence in working with the coach. Though individuals found it useful, more than half of respondents (15) indicated that they stopped attending one-on-one career counseling/coaching for one reason or another. Five indicated it was because they had action steps to take before meeting with the coach again; three said it was because of general lack of interest; three because their needs were fully met at this time; and five stopped coming because of scheduling conflicts.

The career coach works with other members of the LTGS team and the internship team's career development manager to coordinate services and respond to alumni needs and/or workplace opportunities as they arise. His addition to the LTGS team not only formalized the coaching

component, but by assuming responsibility for mid-level employer relationships, it freed up the senior director to focus on overall LTGS/SW management. In time, Year Up envisions the expanded career coaching capacity as a revenue-generating activity for which employers will be willing to pay, a component of Year Up's plan for sustainability.

➔ **Year Up heightened the focus on systems change through the addition of an Influence Manager charged with addressing systemic barriers limiting opportunities for disconnected young adults.**

In addition to LTGS staffing changes, Year Up hired an Influence Manager (Chris Conroy) to work primarily with external stakeholders and partners as well as Year Up participants and alumni to address policy and systems barriers that limit opportunities for disconnected young adults. Although this position is not funded through SkillWorks, it demonstrates Year Up's increasing commitment to addressing systemic issues. This position supplements the high-level policy advocacy work undertaken by the executive director with on-the-ground action.

The influence manager's focus is on changing perceptions about urban young adults, promoting employer practices that help narrow the opportunity divide, and advancing public policies that improve workforce development and education systems. Key strategies include building the organization's internal capacity to work across departments in support of systems change objectives, expanding external linkages, and organizing advocacy campaigns through which Year Up alumni are mobilized. One example of the organization's influence strategy is the recent work on engaging employers in exploring the possibility of implementing a tuition advancement policy. Year Up is working on multiple levels so that Year Up alumni can make better use of employer tuition benefits. Year Up is working with employers to increase access to these resources, with alumni networks to increase awareness of these resources, and with individual alumni to help them navigate college systems and access resources. In working with participants, the influence manager develops weekly themes that are illustrated through group discussions, video presentations, guest speakers, etc., and often reinforced in Year Up's Business Communications class and professional development sessions.

Sustainability of Alumni Advancement Focus

Grounding advancement in a "what's-best-for-participants" framework and elevating the LTGS team to senior departmental status reinforced its importance as a core Year Up strategy. It also increased buy-in to its objectives and the SkillWorks-funded activity and fluidity across the organization's operational divisions. This was particularly important for the learning communities, where instructors and advisors increasingly emphasize the importance of college and career advancement to students and point them to services aimed at building basic skills and college readiness. The SkillWorks grant is now recognized as a vehicle to (a) develop innovative practices and policy solutions that help improve long-term outcomes for graduates, and (b) demonstrate approaches that can be applied by other Year Up affiliates. Moreover, it allows the organization to test strategies to streamline its direct services and broker new income-generating services to employers and other partners.

There is considerable conceptual acceptance by Year Up National of the assumptions that undergird long-term graduate success. In 2010, it began to explore the feasibility of adopting this framework as a central plank of the national strategic plan. By mid-2012, it revised its theory of change to reflect, among other things, an emphasis on one-year retention and addressing the basic skills gap. It also assigned a senior-level staff person to serve as an in-house consultant for alumni services and long-term graduate success. Although Year Up affiliates are at varying stages of developing strategies to implement these objectives, the shift reflects Boston's influence and the learning emerging from the SkillWorks partnership.

EMPLOYER ENGAGEMENT

Background: Challenge to Redefining Employer Engagement

Year Up has relied on a hub-and-spoke model of employer engagement, which has been an effective approach for securing internship slots needed to implement its core program. The SkillWorks grant required the organization to employ a partnership model based on collective engagement that could promote innovation and systems change within the target industry sector. This was a challenge for Year Up in several ways. The perceived insular nature of the financial services firms was interpreted as a signal that firms do not play well together. This turned out not to be as big a barrier as originally thought – financial services firms were networked in other areas – and State Street's involvement generated interest by other firms. Secondly, Year Up's one-on-one employer relationships rested with the internship team's account directors, who are responsible for cultivating internship slots. They interpreted making additional requests of employers as a zero-sum proposition. Additionally, there was uncertainty as to the specific "ask" from companies.

As the initiative evolved, Year Up broadened its employer engagement activities. Its strategies to reshape employer engagement include: recruiting and convening employer partners; mapping career pathways to middle-skilled jobs; strengthening the infrastructure within firms for support for career advancement; and formulating and implementing a systems change agenda. Particularly notable are activities involving State Street, including the involvement of Year Up's career coach and the formation of the Year Up Affinity Network (YUAN). Additionally, Year Up created an internal, cross-departmental Integrated Employer Engagement (IEE) team. The IEE and other employer-focused activities are discussed below.

Employer Champions Group

➤ **While the creation of a robust employer partnership has been a goal since the SkillWorks planning phase, internal factors at Year Up (restructuring) and external sector-related factors slowed progress.**

One of the objectives of the planning phase was the creation of an employer advisory group. Consistent with its hub-and-spoke model of employer engagement, Year Up solicited employer input on a one-on-one basis throughout most of the planning phase. It signed SkillWorks MOUs with several employer partners in 2009 – State Street Bank, BNY Mellon, and Bank of America (which would later leave the partnership when its local operations were curtailed). SkillWorks

urged Year Up to identify more employer partners and convene them on an ongoing basis, with the expectation that they would inform Year Up's overall strategy. Year Up formed the Employer Champions Group (ECG) in late-2009, comprised of the three firms with which it had SkillWorks MOUs and a few others that Year Up hoped to recruit into the initiative. However, the specific strategy was not finalized during the planning phase, nor was it clear how Year Up would augment its hub-and-spoke model of engagement.

Efforts to recruit new members, convene the ECG, and provide workplace services stalled during Year Up's restructuring in 2010 and 2011. One of the challenges to recruiting new employer partners was that few companies other than State Street had a critical mass of Year Up alumni – a problem that persists today. There were a number of ECG meetings held with the MOU partners during this period, but not with the frequency that SkillWorks expected. The ECG's original member representatives were largely drawn from the senior vice-president level. Efforts to recruit more middle managers in order to facilitate implementation resulted in less productive meetings since valuable time was spent introducing and orienting new members. Although the ECG endorsed a general set of workplace services in 2010 (career development orientation, employer mentoring, career development meetings with supervisors), none was provided that year. Members continued to express a willingness to help Year Up promote advancement opportunities within their firms, the industry and among external stakeholders, but the group's lack of momentum challenged even Year Up's most avid supporters.

➤ **ECG membership expanded and engagement increased in 2012.**

In 2012, several converging factors led to increased ECG engagement and refinement of the alumni services strategy, including: increased collaboration between the LTGS and internship teams; completion of the preliminary career pathway study; and recruitment of three new ECG companies (Boston Financial Data Systems, Eaton Vance, and New York Life), two of which are currently offering services to Year Up interns and alumni. The addition of new members assuages concerns that the Year Up's Financial Services Partnership was too narrowly focused on State Street. Movement also occurred on one of the systems change targets – tuition advancement – with Year Up and SkillWorks co-hosting an employer breakfast in November 2012 attended not only by ECG members but other financial services firms as well. Although the format of the forum was informational and not design as a strategic working session, it generated considerable dialogue, with many attendees expressing an interest in sustained engagement on the topic. It represents the first concrete step taken with employer partners to advance Year Up's systems change agenda.

Career Pathways Mapping

➤ **Career mapping for the sector, completed during SkillWorks planning phase, influenced Year Up's career advancement and partnership strategies.**

The career pathways analysis undertaken during the planning phase revealed two characteristics about the financial services industry that not only affected Year Up's strategy, but also had implications for its overall model. First, while a credential is necessary for entry-level jobs in the financial services sector, advancement is predicated on performance, the ability to navigate complex corporate environments, and accumulating skills across a number of departments.

Second, a bachelor's degree is generally not required for advancement within various entry-level tiers, but is required to advance to mid-level positions. These findings helped refocus Year Up's attention on improving career development services for alumni, such as career coaching, mentoring, career development workshops, and other support services. They also led Year Up to reevaluate whether its existing lead education partner was best suited to help its graduates achieve postsecondary education goals and advanced certification, as discussed in the Postsecondary Education section below.

⇒ Career mapping specific to two ECG employers was completed in 2012 and enthusiastically embraced by employer partners. Other applications for this information are still in development.

Year Up proposed more extensive career pathways mapping for each of the ECG member firms in 2011 and contracted this work to an external partner. Progress was slow and the study was ultimately completed in 2012 by Year Up staff and a technical advisor, focusing on State Street Bank and BNY Mellon. Employers enthusiastically embraced the career pathways work, which reflects the industry's emphasis on lateral promotions and building skills across divisions. It provides a level of analysis of entry- and mid-level pathways that was lacking in some firms. LTGS staff has incorporated the career pathways analysis into its coaching and career planning exercises with both interns and alumni. However, application by other Year Up program teams to use the document with students is currently under development. Year Up expects to map pathways in other companies, but the timing of this is uncertain. Additionally, it is unclear if Year Up will attempt to align job titles and skill requirements across the industry.

State Street Bank

State Street Bank, by virtue of its size and the number of YU graduates it has hired, is a key employer partner. As a leader in the industry, it hosts more Year Up interns and employs more alumni than other financial services firms, and has been instrumental in partnering with Year Up to test and implement new approaches. Several important outcomes occurred in 2012 that have helped enhance the partnership and embed LTGS activities.

⇒ State Street has played a critical role in helping Year Up expand and reenergize the ECG.

The company collaborated with Year Up to develop a formal outreach strategy to recruit new companies to the ECG. The approach involves staff from Year Up's internship team or development department providing the prospective ECG member with an initial introduction to Year Up's advancement framework and the LTGS director, who then teams with State Street's Vice President for Community and University Relations to visit the company. These meetings provide an opportunity for State Street to speak to its peers in very concrete terms about the benefits of the career advancement model and the Year Up partnership. This approach resulted in three new members being added to the EGC this year. Eight others have been targeted for outreach in 2013. As the partnership strengthened in the last year, State Street has also played a role as a strategic thought partner, particularly on the topics of tuition advancement and increasing the rate of conversions of interns to employees.

➤ **State Street was the early adopter of the new career coach model.**

Building on previous steps taken to incorporate career development services for Year Up alumni, State Street readily embraced the work of the career coach, who spends one day a week on site at State Street offices, rotating between four sites in the region. The company has made office space and other resources available to the career coach and assigned a senior-level Skills Trainer from its human resources' skills training and employee development department to work with him to implement the activities. Notably, this work has been written into the Skills Trainer's job description and thus institutionalized as an ongoing State Street activity. The Skills Trainer was instrumental in helping alumni form the Year Up Affinity Network and expanding services to include Year Up interns. Currently, most activity takes place within the division where most Year Up alumni are concentrated, but the company's ECG members have connected Year Up to other State Street managers who are responsible for training and hiring. The coach introduces senior managers and supervisors to the services that are available and explains how they supplement and can be integrated with the company's internal training resources. In addition to one-on-one career counseling, services include career and education planning, mentoring, monthly workshops, speakers' luncheons and other professional development activities. The career coach makes extensive use of the career pathways tool and has aligned it with specific professional development resources available within the company. State Street has also adapted the career pathways mapping for broader use within the company.

The partnership with the career coach sends a clear signal about the importance of career advancement to the company's retention strategy and demonstrates the value to other financial services firms. State Street credits the Year Up partnership with helping it become more strategic about retention and advancement, particularly with the availability of the career pathway tool. It also credits Year Up's restructuring and new staff additions with helping to streamline the process of on-boarding new interns, as well as improving its capacity to respond to issues and opportunities as they arise.

➤ **The creation of the Year Up Affinity Network in late 2011 holds potential to support alumni in professional development and career pathway navigation.**

Another major development at State Street is the formation of the Year Up Affinity Network (YUAN), one of scores of affinity groups at State Street. It is viewed as an important vehicle to increase the company's cultural competency and promote diversity. YUAN was designated as an approved affinity group in late-2011, but momentum slowed when one of the founding Year Up alumni left the company. Activities resumed in earnest in Spring 2012 with a formal kick-off attended by Year Up alumni and interns. State Street's affinity groups are open to all employees, and YUAN attracted 15 non-Year Up members in 2012. It meets monthly, drawing 30-40 alumni and other participants. The company underwrites the group's \$5,700 budget and has assigned senior staff to work with it. In support of Year Up's outreach to other companies, State Street showcases YUAN to other firms to encourage them to start similar affinity groups.

YUAN's mission is to promote professional development and help members navigate career pathways. The full suite of activities was still being developed at the time of this study, but the

general plan is to provide workshops, services, and networking opportunities that support advancement. Its objectives were beginning to align with key LTGS strategies, such as strengthening basic skills, increasing college readiness, and connecting members to other supports. However, it was not clear how YUAN participants would be tracked and who would assume this responsibility. State Street officials view alignment and the use of data as important components of the group's work. Similarly, although YUAN and YUBAA share several board members and a similar interest in career development, there is no formal integration of the two alumni groups and only very preliminary exploration of how YUBAA might provide access to other State Street employees, facilitate career development programs in companies that do not have a high concentration of Year Up alumni, and/or utilize the career pathways mapping in any concerted way.

Integrated Employer Engagement

➤ Year Up's previous organizational structure left employer relationships fragmented and alumni advancement de-emphasized.

The lack of coordination across the various Year Up divisions that have relationships with employers became more apparent as the LTGS team sought to engage new companies. As discussed above, the internship team had little incentive to highlight Year Up's participation in the SkillWorks initiative as part of its employer outreach and was initially protective of its employer relationships. Year Up recognized this as a missed opportunity, but amidst the challenges of the organizational restructuring opted for a workaround rather than addressing the problem head on. It worked with the organization's development (fundraising) staff to gain access to new employers and then brought in the internship team as appropriate.

➤ The creation of a cross-departmental team focused on employer engagement is catalyzing new practices with current employers and is hoped to facilitate recruitment of new employer partners.

Once the changes made under the restructuring began to settle in, Year Up began to explore how to coordinate across the various departments that have relationships with employers and capitalize on these multiple points of engagement. This resulted in the creation of a cross-departmental Integrated Employer Engagement (IEE) team, comprised of Year Up's executive director and the directors of LTGS, Internship/Employment, Development, and Influence teams.

IEE will pilot new modes of aligned employer engagement with a handful of Year Up's employer partners, with the expectation that these practices will be applied to other employer relationships and facilitate recruitment of new partners. These approaches will also leverage advancement as part of Year Up's partnership development and brokering strategy, which is a core component of its long-term sustainability strategy. Year Up hopes to first demonstrate the viability of targeted services, such as career coaching or job conversion strategies, with a small number of companies that have high concentrations of Year Up graduates before marketing its services more broadly. It also anticipates customizing services to individual firms. This will require the type of close, coordinated working relationships IEE expects to model.

POSTSECONDARY EDUCATION

Background: The Need for Postsecondary Preparation

Year Up's postsecondary education strategy has been informed by two revealing studies conducted during the planning phase. A participant survey that assessed student and alumni perceptions about higher education found that positive views on the importance of postsecondary education shifted at various points during the Year Up training but tended to increase the longer alumni remained formally employed. This led Year Up to contemplate a number of strategies aimed at reinforcing the importance of postsecondary education to both students and alumni and encouraging participants to build on the college credits earned during the Year Up training. This initially included emphasizing higher education in its core training programs and support services, holding college fairs, and offering workshops on college readiness to students and interns. In and of themselves these strategies were promising; taken in the context of a second assessment that examined students' basic skills, the impact of these strategies seemed to be a drop in the bucket. A second study found that 95 percent of Year Up's students could not meet college-level math requirements and more than two-thirds would require three developmental education classes to meet college admissions standards.

Developing a plan to address math basic skills deficits would become a central condition of the SkillWorks grant, with the initiative urging Year Up to incorporate math into its core curriculum. After considerable deliberation that took the better part of 2010, Year Up implemented several pilot projects: internal basic skills testing (using Accuplacer), math tutoring, and voluntary math classes held after-hours. These activities became core components of its advancement services. At the same time, Year Up remained focused on the larger goal of making college more accessible and strengthening connections with community colleges. These activities are examined below.

In addition, Year Up continued to refine other programs that focused on setting and achieving postsecondary education goals, including the bridge-to-college support group – a college readiness program targeting interns who have clearly defined postsecondary education goals. Although participation was spotty in 2012, Year Up continues to award competitive scholarships to help participants offset developmental education and/or tuition fees. Higher education and college readiness also continue to be core areas of focus of the professional development sessions held during the internship phase. Additionally, an increasing number of Year Up alumni attending or interested in attending Bunker Hill Community College (BHCC) benefit from working with a college navigation coach, who is funded by SkillWorks.

Services to Improve Basic Math Skills

The primary objective of providing math-related services is to reduce the amount of developmental education Year Up graduates require in order to enter college. Although employers have not identified math skills as an immediate prerequisite for entry-level financial operations and investment operations jobs, they are important for advancement to mid-level

positions. Year Up took a number of steps to make services available to students and alumni and impress upon them the importance of mastering the fundamentals of math.

➤ **Year Up's early steps focused on raising awareness of the need to improve math skills and encouraging tutoring.**

Beginning in the fall of 2011, Year Up began administering the Accuplacer test in-house in each of the four learning communities. Procedures were established to review scores with students and customize tutoring and other academic services to participants' individual needs. The scores were also used in tandem with an important tool Year Up developed to demonstrate the cost and time associated with meeting developmental education requirements and services available through Year Up to improve basic skills.

Students were encouraged to sign up for math tutoring, which was targeted to those who tested in the lowest developmental education levels, and/or a math class, which was available to any student on a voluntary basis in the afternoon or evening. Tutors were identified by Year Up's development division, which coordinates volunteers. Tutors provided instruction in small-group sessions three times a week. (Tutoring was also available for reading and writing.) Math class was offered twice a week during the day and evening, with the expectation that the evening session would attract mid-career alumni. Instruction was provided under contract by X-Cel Adult Education. Participation was voluntary and completion rates were generally low, including for mid-career alumni. Some participants experienced an increase in test scores, and a few actually reduced their developmental education requirements.

➤ **Over the course of 2012, Year Up worked to build organizational support for the idea of embedding math instruction into its core training curriculum and formalizing the support services available to help students improve their math skills.**

Perhaps the most noteworthy step taken by Year Up to address math basic skills has been the modification of its core curriculum to allow one math class to be taught as part of the Learning & Development (L&D) training. This was accomplished by eliminating one of the Business Essentials classes and incorporating the content in other courses, thus making math instruction a formal, mandatory part of Year Up's training program. The course is entitled Math Essentials and meets for 80 minutes per week. Instruction is provided by X-Cel and supplemented by an in-class teaching assistant who is also available to students on a walk-in basis for an additional hour per week. The classroom is organized around pods of students with similar skill levels, allowing the instructor and TA to work with each group individually. The X-Cel instructor, who is also a Bunker Hill Community College adjunct instructor, draws on college's developmental math and college-level algebra syllabi and textbooks for MAT 093, MAT 097, MAT 099, and MAT 194 courses to structure the scope and sequence of Year Up's Math Essentials course.

The math class is currently being piloted in one of the learning communities. Year Up expects to embed the math curriculum throughout all of the learning communities on a staggered basis, with a new one coming online with each entering class, and all learning communities offering math by early-2014. The voluntary evening math class has been discontinued, and strategies to address the developmental education needs of alumni are still in development.

Year Up has taken a number of other steps to support the math component and improve college readiness. In the past year, various organizational functions have been refined and integrated. In the area of tutoring, there is increased coordination between the LTGS and the development teams to recruit volunteer tutors, and between LTGS and academic affairs to match participants and tutors based on documented skill levels and needs. The importance of math skills to college admission and career advancement is now included in the orientation provided to tutors. X-Cel developed a formal curriculum for the math tutors that is aligned with the course curriculum, which provides better sequencing and consistency across the two methods of instruction.

Students are encouraged to supplement the math class with tutoring and to continue it during the internship phase. Currently, Year Up has almost enough tutors available to provide one-on-one instruction, but uses small group instruction when one-on-one matching is impossible. Students receive tutoring once a week, selecting from three available sessions to better accommodate their schedules. Year Up continues to administer the Accuplacer test to all students in all learning communities during the second week of L&D and use the scores in individualized planning with students. Those who sign up and complete tutoring are retested at the end of L&D. In the long-term, Year Up expects to identify an external partner to administer the test. Year Up is using an additional math diagnostic tool that targets areas needing improvement based on the Accuplacer results.

➤ An assessment of outcomes from the voluntary math classes shows academic progress but not sufficient to avoid developmental classes.

Outcomes from the voluntary math classes showed that students who participated in both the math class and tutoring tended to have better outcomes, with many students improving their overall test scores. However, it was rare that these interventions resulted in a significant reduction in developmental education prerequisites. To better understand the impact of the math classes, the evaluation team conducted a survey of students enrolled in either the evening or afternoon math class offered by Year Up. The class did not involve a long-term commitment from participants and many chose to attend a fairly small number of classes: seven people attended between 1-5 classes, six people attended between 6-10 classes, and eight people attended more than more than 10 classes. Of the seven individuals who took the Accuplacer test at the end of the course, six increased their scores. Although 70 percent (14 participants) found the improved math skills useful to job performance, that was not the reason most individuals enrolled. Sixty-seven percent enrolled in the class to meet college admission requirements; the same number of participants acknowledged that they enrolled to improve general skills. However, of the seven individuals who took the Accuplacer test, only two of them believe that the score will allow them to enroll in a credit-bearing college-level math class.

Apart from the increase in math skills, Year Up sees value in the voluntary math classes. These activities increase students' academic skills and reinforce the values of college and career advancement, while the small group instruction (within the larger classroom structure) is viewed as helping to build students' camaraderie and leadership skills. The survey of math students supports Year Up's assessment; nearly two-thirds of the students who had taken the math class report that they have since enrolled in either a four-year or community college. Year Up has corrected many of the past problems with its data tracking system and has full data sets for the

last two cohorts of participants in the voluntary math classes to compare against the formal instruction in the piloted math class.

Dual Enrollment Partnership

➤ **Year Up has long sought to build closer ties with the community college system.**

Although the terms of the SkillWorks' planning grant did not identify additional partnerships with higher education institutions as an outcome, Year Up understood that its students would be best served by having better access to community colleges. During the planning phase, it inventoried degree and non-degree credentials that support financial services occupations and explored how it might parlay the Year Up credential into a new industry-recognized financial services credential. Year Up also signed articulation agreements with several new higher education partners during the planning phase and several more during the first year of implementation. It also began to explore replacing its dual enrollment partner — Cambridge College, a four-year institution — with a community college partner. As the initiative evolved, the strategy shifted to focus on stackable credentials that align with defined career pathways. This approach became a key consideration in discussions with prospective dual enrollment partners.

➤ **The pace of identifying a new dual enrollment partner slowed in 2011 and 2012, largely due to a number of external factors that were outside of Year Up's control.**

Changes within the community college system slowed Year Up's progress in reaching an agreement with a new dual enrollment partner. Initially, a change in leadership at Mass Bay Community College derailed early negotiations. Year Up's alternative prospect, Bunker Hill Community College (BHCC), which is perhaps better suited to meet the needs of Year Up's participants, embraced the idea of a partnership, including Year Up's proposal that its site be designated a BHCC satellite campus. This arrangement would provide the college with a foothold in the downtown area and access to Year Up's network of employers. For Year Up, the move would increase access for its alumni and allow it to build on a set of relationships with BHCC staff and faculty, including its work with BHCC's college navigator, who works with a large number of Year Up graduates, and Year Up's math instructor, who is a BHCC adjunct instructor and maintains good relationships with Year Up students. Moreover, becoming a satellite campus would advance a key element of Year Up's sustainability strategy and provide the organization with additional revenue streams from rental income, ideally from counseling and other services provided to students.

Year Up expected to solidify the BHCC partnership in early-2012, but negotiations were slowed by a general reticence within the community college system to implement new practices or reforms in reaction to the successful policy push for statewide community college reform. (Although Year Up has been active in advocating change within the higher education system, it does not attribute its activity to the delay in its dual enrollment agreement with BHCC.) Negotiations continued throughout the year with the expectation of finalizing the partnership with Bunker Hill in time for Year Up's next entering class, pending final approval from BHCC's board and the State Department of Higher Education. Unfortunately, the process stalled again in

late 2012 because the partners could not identify the appropriate “faculty status” for the Year Up instructors who would be teaching courses for BHCC credit.

In early 2013, after engaging Massachusetts Secretary of Education Paul Reville for his assistance in crafting a solution, Year Up and BHCC agreed that a dual enrollment partnership would not be feasible at this time, despite the best efforts of both institutions and the significant progress over the preceding year. Despite this setback, BHCC and Year Up remain committed to partnering with each other and making it easier for Year Up graduates to transfer credits and continue their studies at BHCC.

SUMMARY

The SkillWorks grant has allowed Year Up to shift its operational model from one that focuses on direct services to one that increasingly capitalizes on the integration of programs, services, and systems change. In order to expand its capacity to innovate and test new practices, translate this learning into meaningful programs and strategies, and promote change among external partners and policymakers, Year Up recognized that it needed to modify its organizational structure. While the restructuring took longer than expected and substantially hindered progress on the SkillWorks-funded activity with participants, it resulted in much more coherence and alignment between Year Up's advancement objectives, its overall mission, and its operational units. This in turn is influencing the national network of Year Up affiliates to rethink the focus on short-term placement objectives in favor of long-term outcomes that are well-aligned with the goals of the SkillWorks grant. While the specific SkillWorks participants may not benefit in terms of career advancement to the degree that was envisioned in the grant, Year Up's changes now offer both increased opportunities for previously disconnected young adults and consideration of advancement strategies that potentially address middle-skills job shortages.

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