

ECOS Annual Planning Retreat November 3-4, 2000

WORKING REPORT AND TASK FORCE ASSIGNMENTS

2000 Participants: Jesse Kappel – VRD, Patti Swanson, and Owen Gibson – Eastwind Center, Sharron Kelley – Multnomah County Board of Commissioners, Karen Cusick, Dave Allen, Lennea Cordray and Sue Taylor – State of Oregon Employment Department, Claudia King and Andy Raubeson – Human Solutions, Inc., Catherine Hoofard – Resource Connections, Marin Peterson – Portland Habilitation Center, Lynn Mayer-Beam – IAM Cares, Mary Kowalski, Gwen Nothwang and Elizabeth Renguso – Mt. Hood Community College, Lynette Walters – Springdale Job Corps, Brad Swiggart – Steps to Success, Marietta Schlumpf and Don Walters – SMS Services, Charlotte Dorsey – ECOS and Region 2 webmaster, Kelly Carroll – Multnomah County Adult Community Justice, David Dragavon – Multnomah County Aging and Disability Services Office, Khadim Chisti – FamilyWorks, and Joan Pasco, Retreat Facilitator.

Using an interactive, group process, participants prioritized the following six key planning areas:

- Develop strategies to increase collaboration between ECOS partners
- Develop strategies to sustain energy for ECOS future.
- Develop strategies to develop career paths to family wage earning jobs
- Develop strategies to better serve the employment needs of Non-English Speakers
- Develop a Business Involvement strategy
- Develop a strategy for long-term financial stability for ECOS, inc.

Recommendations for each are attached. An ad hoc committee met on Friday, December 1, 2000 to complete the work by determining the organizational capacity to complete each action step and assign roles, responsibilities and timelines to the work that ECOS will include in its 2001-2000 Business Plan and Program of Work. The ad hoc committee is recommending that the existing Business Services Team and Business Advisory Council Task Force be assigned those projects that are employer related. They further recommend the creation of two new task forces: One to work on building/sustaining organizational collaboration and energy, the other to work on strategies for targeted populations.

ECOS Committee/Task Force Structure:

Existing:

Finance Committee – Chairs: Patti Swanson and Jesse Kappel Members: Jennifer Dement, Gwen Nothwang, Catherine Hoofard, Karen Cusick, Pat Parmenter, Claudia King

Business Services Team – Facilitators: Lennea Cordray/Dave Allen Members: Lynn-Mayer Beam, Fred Rau, Connie Foster, Meg Kilmer, Betsy Pfannenstiel, Rich Duval, Lynette Walters, David Dragavon

Business Advisory Council Task Force: Chair: Catherine Hoofard Members: Dave Allen and Joan Pasco

Staff Development Planning Task Force: Facilitator: Joan Pasco Members: Gwen Nothwang, Karen Cusick, Sue Taylor, Maile Kuenzle, Kathy Johnson, Owen Gibson, Catherine Hoofard.

Capacity Team: Chair: Phil Dean, Members: Owen Gibson, Paul Molino, Joan Pasco,

Proposed new working groups:

Fee for Service Task Force: (Established at the Retreat) Catherine Hoofard, Chair. Members: David Dragavon, Lennea Cordray, Don Walters, Dave Allen and Joan Pasco

Big Picture Committee: (Established at the Retreat) Sharron Kelley – Chair, Marin Peterson, Marietta Schlumpf, Patti Swanson and Joan Pasco. Will ask Cary Harkoway to participate as well.

Collaboration and Energy Task Force: Facilitator:

Targeted Population Task Force: Facilitator:

Issue Area: Develop Strategies to increase collaboration between ECOS partners: Challenge Statement: Lack of information on programs makes collaboration difficult. Overload of some information is intrusive and time consuming.

Recommendation #1: Work with the state to expand use of Oregon Pathways

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Conduct research on current status of system	Time		Joan Pasco	
Market to current and prospective users Updating information of current users	Connection to state		State employment office – Dennis Green	
Conduct quarterly training	Connection to state		State ED	
Develop a customer comment evaluation tool Monitor and evaluate/tweak/partners and users	Connection to state		State ED	
Try to link to MC eligibility calculator and fair housing tools	Connection to state		State ED	

Recommendation #2: Develop opportunities for networking, model after Chamber after hours/before hours

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Schedule ECOS meetings at partner sites	Coordination time			
Conduct agency tours/materials/share information	Coordination time			

Recommendation #3: Update ECOS and agency web pages

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Update web/linkages on east county site/www.1stop.org, dev web site bulletin board, (needs wsi approval), get domain name for eastcounty1stop.org	Coordination time \$70 to hold name for 3 years		Charlotte Dorsey Joan Pasco	

Recommendation #4: Sharing best practices and resources

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Notify partners to collect and identify what's working	Coordination time		Joan	
Publish on web	Coordination time		Charlotte	
Link with the state best practice web site	Coordination time		Charlotte/Joan	

Recommendation #5: Publish list of partner leads

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Update ECOS list/lead contacts	Coordination time		Joan	
Distribution process: email/web process			Joan & Charlotte	

Force Field Analysis: Collaboration Strategies

Driving Forces	Restraining Forces
Overwhelming need for information	Lack of time and resources of staff
Duplication of process and services	Information overload/multiple notification
Pathways is in place	Individual program requirements limit solutions
Most organizations have web pages	Trying to be everything to everybody approach
Most organizations have designated One Stop point persons	Need to develop fee for service expertise

Issue Area: Develop strategies to sustain energy for ECOS future. Challenge Statement: In order to sustain a viable organization, ECOS must try to prevent burn out of committee members, turnover in agency representation; and address how to keep momentum going, lack of forward motion, lack of measurable results, and lag time.

Recommendation #1: Identify agency staff members with a passion for the process. Starting small projects to kindle the fires of new staff; commitment of at least one year and build results.

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
ECOS orientation presentations – annually	Coordination /training time		Joan	
Recruit committee members – for task forces/planning teams		Board members		
Create recognition and reward programs		Ad hoc committee needed		
Self referrals and direct referral to ECOS members/skills, talents, interests				
Employee swapping/job trades/shadows	Coordination time			

Recommendation #2: Share results that have meaning. Celebrate successes within agencies, share stories of success, more effective use of web site add a key that keeps bringing agency people back to the website.

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Best practices web site	Coordination time	Link with state page	Charlotte/Joan	
Conduct agency open houses		Task force needed		
Newsletters, articles in local papers, agency contributors	Process needed			
Fun events, socials, celebrate Annual ECOS open house Displays, booths,		Assign to <i>Celebration</i> task force		

Recommendation #2: Develop relationships and agency understanding.

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Agency open houses meet at other agencies	Merge with above			
Quarterly after hours/BF meeting				
Agency presentations at meetings				
Challenge solving time at meetings-Wheel of misfortune, partnership game etc.				

Recommendation #3: Internal marketing, increase visibility: improve how ECOs markets to partners and partner staff

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Quarterly newsletter Up-coming attractions ECOS screen saver Tip sheets/good ideas				
Continue monthly updates	Coordinator time		Joan	
Create Oregon Pathways standards/information format			Joan & Charlotte	
Links to agency partner pages on web page			Charlotte	
Consistency in format	Design review needed			

Force Field Analysis: Strategies to Sustain Energy and Momentum

Driving Forces	Restraining Forces
Personal and professional commitment	Apathy
Passion for streamlining the system for client access and success	Stalemates (wsi)
Meaningful results	
support of online staff training	
Spark plug in place	Energizer/networking/coaching
Agency and administration that supports participation	
Adaptability and flexibility	Resistance to change

Technology	Need for continual upgrading
DHS reorganization and ECOS working with dept.	DHS reorganization
Labor Market	Labor Market

Issue Area: Develop strategies to develop career paths to family wage earning jobs. Challenge Statement: What can ECOS do to address the major barriers to a meaningful career path: limited English, lack of information, lack of education/skills, institutional discrimination, lack of exposure, business view of career development, lack of self esteem/motivation.

Recommendation #1: Promote the importance of “learning a living”/staff development and training to the business and general communities

Task/Action Step	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Develop and share models of companies that have career paths		Business Services Team		
Develop training for employers to create employee loyalty – as part of an ECOS speakers group, for small businesses, use the chambers		Business Services Team		
Promote ECOS through chamber groups and relate to #1 & 2		Business Services Team		

Recommendation #2: Promote educational programs regarding specific areas of institutional discrimination, offer/develop assessment/evaluations, for staff development for traditionally marginalized and general population.

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Develop broadly based information about myths of particular types of discrimination				
Develop banners on Yahoo, Hot Jobs, etc. giving information debunking myths about discrimination, use the chambers				
Use FAX and email to distribute information				

Recommendation #3: Create and promote a mentoring program

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Develop a mentor/support program to assist people with upward mobility through employer mentor activity	VocRehab \$			
Develop pilot programs for targeted populations	Foundation funds			
Explore program within chambers/develop pool of				

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
potential mentors				

Recommendation #4: Develop written models of career paths taken to move from entry to family wage earning jobs.

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Survey of individuals that used OJT to get to high paying jobs – record process used	Research and coordination time	Ex-offender retention strategy team		
Identify jobs and classifications in high demand/specific to east county	Research time		Malcolm and Joan	
ECOS partners commit staff time to develop career ladder fact sheet	Coordination time			

Force Field Analysis – Family Wage Earning Income

Driving Forces	Restraining Forces
Business partnerships	Challenge to gaining business sector buy-in
Models of successful educational programs	Political climate
Laws supportive	Fear and ignorance
Links to Human Rights organizations	Myth of reverse discrimination
Successful models from the business community	New – no one’s done it
Next steps to the school mentoring programs/linkages that exist	Liability issues
Skills exchange	Lack of follow through
Mentor bartering	Staff time to coordinate

Issue Area: Develop strategies to better serve the employment needs of Non-English Speakers. Challenge Statement: Non-native speakers experience barriers in the utilization of community resources & seeking employment and housing.

Recommendation #1: Employer Awareness Training: diversity training, for management and with line staff. Job specific training, employers learn relevant Spanish terminology/awareness (or other non-native languages) specific to industry.

Encourage employers to have staff learn non-native languages (incentives)

Task/Action Step	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Develop/create a consistent ECOS message to employers re value and benefits of hiring from this population – video could be produced, power point presentation, employer councils/chambers		Business Services Team		
Develop and conduct ESL training/job or industry specific target medium/small business – banks, retail, fast food		MHCC/ECOS partnership		
Spearhead a project/survey process to gather input from		EPH/Human		

Task/Action Step	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
non-native speaker communities		Solutions/ECOs		
Survey to develop resource people for speaker bureaus, then train, and schedule same	Research/coordination time		Joan	
Market the system to employers to get them to help with promotion and process		ECOS Business advisory council ?		

Recommendation #3: Utilization of multi-lingual staff across agencies/business. Advocate breaking down of barriers within community, work together to leverage additional services for non-native speakers, utilize staff in training across system.

Task/Action Step	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Market info/list/resource of translators (compile system wide list)	Coordination/research time		Joan	
Encourage non-native churches/communities to support ESL				
Cultural diversity training needs expanding, non-traditional cultural training/employment issues, view of government, etc.				

Recommendation #4: Utilize youth that are bi-lingual within community. Work with schools to build into school-to-work experience & allow youth incentives to work in community and businesses/employers.

Task/Action Step	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
ECOS/schools/business: develop a bi-lingual youth core to partner/provide translator and mentoring services.	Work with STW	STW coordinators	Joan to work with them	
Partner and skill mix: non native, skilled worker with unskilled youth/person with language skills	Work with STW	STW coordinators		
Promote and advocate for training for bi-lingual self-employment	Major grant needed			

Recommendation #5: Market value to employers/research with community. Success stories relayed to business – gathered from ECOS partners. Gather input from non-native speaker community of barriers and effective strategies. Listen to faith community/look at partnerships

Task/Action Step	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Project to gather input from non-native communities combine with #3				
Develop resource people that could speak to employers on issues Combine with #3				
Target medium to small employers				
Video, power point plant tours, on web site				

Recommendation #6: Conduct ECOS sponsored trainings

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Sell training to employers				
Conduct training that is industry specific				
Encourage strategy to develop job skills in native language first, then learn it in English	Major grant needed City of Gresham will help	New committee needed Could be focus for spring staff retreat	Joan/Shelley/Gwen	

Force Field Analysis – Non Native Speaker strategies

Driving Forces	Restraining Forces
Increase (east county) in numbers/all non-native speaking populations	Stereotypes and prejudices
Employers recognize strong work ethic of this population	Lack of trust (by non-native speakers)of services and community
Current economic conditions	Lack of cultural understanding
Interest/passion/commitment of all our agencies	Previous experiences with native land
	Negative experience of non-native speakers of system
	Employees tend to look at short term gain – stuck in current hiring and training schemes
	Need of marketing plan and tools to present to community/employers
	Non-native speakers illiteracy rate
	Illegal immigrant issues

Issue Area: Develop a Business Involvement strategy. Challenge Statement: In order to design programs that match demand strategy, employers need to be involved with the planning process

Recommendation: Establish a business advisory council to work with the ECOS board; create activities that will engage employers in the ECOS process.

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Select 8-10 persons to serve on board	Coordination time	Business Advisory sub-committee	Dave, Catherine, and Joan	
Define work plan for group/meeting schedule, etc.				
Create path for input to and from ECOS board				
Design strategy to address cultural differences				
Conduct an annual workforce event to bring business to ECOS/partners				
Generate success stories from business				
Conduct annual customer satisfaction survey				
Do post employment survey of employees				
Create job trades/partners with business				

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Hold ECOS meetings at corporate sites				
Create supply-side strategies that match demand side strategies				

Issue Area: Develop a strategy for long-term financial stability for ECOS, inc. Opportunity Statement: ECOS could generate operating revenue via a shared cost, membership/partnership support strategy.

Recommendations: Just do it. Convene member organizations, make proposal, and determine fair share allocations. Establish a billing process and deadlines.

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Needs to be self-supporting, mandated members should pay membership fee or sliding scale based on FTE's or standard flat fee for each: \$8600/yr x 5 = \$43,000				
Annual memberships for non-mandated members \$500 each (44) = \$22,000				
Businesses: 5 major corporate sponsors @ \$2000/yr = \$10,000				
Individual smaller businesses that use services/\$100-\$250/yr. Supportive members. Benefits: listed as contributing member, receive announcements, discount on training fees, receive ECOS updates and newsletters, recruitment and pre-screening services, post openings on web sites, etc. Links from business to ECOS web site On-site training to member businesses Email annual survey on business needs Wall plaques				

Opportunity Statement: ECOS could generate operating funds from events/annual functions

Recommendation: Sponsor a high profile community fund raising event and other functions that would generate new income. Work with the organizing committee below to determine working structure and timelines.

Task/Action Step	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Event partners secured – media, hospitality and event coordination		Sub-committee		
Secure Sponsors – OETA, Corporate etc.				
Secure and book speaker – high profile				

Recommendation: Create opportunities to support ECOS through Job Fair partnering

Task Action Step	Resources needed:	Assigned to:	Persons Responsible	Reporting timeline:
Approach/advocate for Job Fairs to generate a percentage or support base/fee to support one-stops		Sub-committee		
Work with employment depart/employer council, consider raising fees to generate overage to ECOS				
KXL/K103 – radio station partnerships/media virtual job fair website – higher profile events				

Recommendation: Partner with GEC/businesses to jointly sponsor and publicize employer/partner training events. Build the sphere of influence, grow and enhance the public response, Keep them affordable with a percentage going to ECOS.

Task Action Step	Resources needed:	Assigned to:	Persons Responsible	Reporting timeline:
Get corporate sponsors/speakers/hosts/multi-year commitment from one business, i.e. (Junki Yoshita)– food costs diverted to revenue		Sub-committee		
Firm up calendar within 2 speakers - identify				
Approach Gresham Employer Council with idea				
Form ECOS committee to identify/secure sponsor for each event. – all events.				

Recommendation: Secure multi-year sponsors for ECOS: Technology sponsor, media sponsors, Secure in-kind partner sponsorships (Financial)

Task Action Step	Resources needed:	Assigned to:	Persons Responsible	Reporting timeline:
Develop sales/marketing plan to recruit targeted /specific industry reps		Sub-committee		
Educate board on how to develop				
Create value-added strategies that describe meaningful return for sponsors				
Recognize sponsor (all) at event				

Opportunity Statement: ECOS can competitively and realistically assess fees for service from employers that utilize ECOS resources

Recommendations: Create a subcommittee to work on both of these action plans: Catherine Hoofard, Chair. Members: David Dragavon, Lennea Cordray, Don Walters, Dave Allen and Joan Pasco

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Upfront employer “finder” fees for job placements Need to understand how this can work	Investigate/research group practices			

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Broker outside services: testing job retention Investigate structure/nationally, locally Realistic/market rate	Research market potential			
Develop pricing structures large and small businesses/contracting opportunities – wsi and non-wsi recruitments	Investigate sliding scales in use, profit vs. non-profit status, large vs. small business			
Increase fees for retention incentives, funds to enable this activity Not lose sight of how fees are split/divided	Investigate legal issues of paying workers placed Develop retention timelines Research comparables			
Employer seminars/training research topics need to address conflicts of interest with partners ID expertise to conduct training, advocate people to pick issues that interest them/niche/	Research topics and fee structures, broker to CC or whoever Address potential conflict of interest			
Facilitate small business development of EAP benefit plans, could create a member association to buy EAP's collectively/coop - Investigate potential	Research what exists (United Way) Create fee structure			
Ex-offenders: potential for ECOS to be catalyst to bring together employers to address need – put in place plan to generate funds for program	Explore options Employer research Grant opportunities	Focus group needed		

Opportunity Statement: ECOS could generate major resources from large contributors/federal grants

Recommendation: Develop a vertical approach to seek large money to solve problems – convene a task force to examine potential and steps to seek out large, multi-organizational grants. Benchmark: Reduce children living in poverty. This benchmark crosses all service areas. Big Picture Committee: Sharron Kelley – Chair, Marin Peterson, Marietta Schlumpf, Patti Swanson and Joan Pasco. Will ask Cary Harkoway to participate as well.

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
Establish a task force		Big Picture – new committee		First meeting: November 17, 2000
Define funding sources				
Develop a strategy to coop resources among multiple partner organizations				
Use the system building/any door concept to pursue large grants to cover: Subsidized training programs, housing, jobs, IDA, transportation, health care, child				

Task/Action Stop	Resources needed:	Assigned to: (committee)	Person(s) Responsible:	Reporting timeline:
care Skill building: soft skills, living, mentors, career paths Capital improvements				