# Enhancing the SCSEP Network:

# Collaborations, Innovations, and Promising Practices

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# EXECUTIVE SUMMARY

## Background

The aging of the more than 78 million baby boomers has and will continue to have a major influence on everything from education to health care to leisure. One of the most important impacts of the boomer cohort is in the area of work and retirement. The boomers have already altered the age distribution of the workforce with the proportion of the labor force aged 55 and older increasing from 12.4% in 1998 to 18.1% in 2008. By 2018, almost one in four workers (23.9%) will be age 55 and older (Toossi, 2009). Older workers are and will continue to be an essential component of the U.S. workforce.

Today's economic conditions, however, have changed the employment landscape for many older workers. Those aged 55 and over have experienced a rapid increase in unemployment rates since the beginning of the 2007 recession. In August 2010, the unemployment rate for people aged 55 and over was 7.3 %, compared to 3.2% at the beginning of the economic downturn in December 2007. The number of discouraged workers aged 55 and older no longer seeking employment was 308,000 in December 2010, compared to 202,000 in December 2009. In 2009, 3.2 million men and women aged 62 and older received new Social Security benefits, the highest number since Social Security began, with a take-up rate of 26%, up from 21% in 2007; this higher rate of Social Security take-up may be in part due to lack of workforce opportunities (Johnson & Mommaerts, 2010). Despite unemployment rates below the national average, when job loss occurs, it takes older workers longer to find a new job than their younger counterparts and they generally experience a greater decline in wages when they become reemployed (Johnson & Mommaerts, 2011; O'Leary & Eberts, 2007).

To address the employment needs of older workers, the Senior Community Service Employment Program (SCSEP) was established under the Older Americans Act. SCSEP is the only federal program that serves low-income older workers exclusively, but the funding is quite limited. Over the past several years, older workers have increasingly relied on another set of programs funded through the Workforce Investment Act (WIA) for training and employment services. These programs are implemented at the local and regional level through a range of organizations termed workforce intermediaries. Given the current economic and demographic realities, understanding the effectiveness of employment and training programs for older adults is crucial.

**Study Design**

This study was designed to identify innovative and promising practices in providing employment and training services to older workers. This is particularly important now as both SCSEP and WIA programs will experience a decline in funding from program year 2010 to 2011. Effective July 1, 2011 SCSEP funding was reduced by 45.5% and funding for the WIA Adult and Dislocated Worker programs was reduced by 10.6% and 8.8% respectively. To examine program promising practices the study used three strategies; a review of relevant literature and documents, analysis of program performance data, and key informant interviews. Twenty-eight key informant interviews, including SCSEP and WIA program administrators at the state and local level, workforce intermediary organizations, and community college officials, were conducted. To identify key informants for the study, we reviewed employment program performance data. Top performing states included Arizona, Florida, Iowa, Massachusetts, Pennsylvania, and Washington. Senior state-level WIA program officials were interviewed in each state. In addition, senior state-level SCSEP program officials were interviewed in Arizona,

Iowa, Minnesota, North Carolina, and Ohio. Several workforce intermediaries were also interviewed.

**Study Findings**

Despite considerable challenges and a complex service delivery system, the study found numerous examples of innovation and promising practices for successfully linking older workers to employment.

- **Structure of Service Delivery System**

Federally funded employment and training programs exist in a complex, and sometimes confusing, system. At a federal level, there are 47 different programs, most of which are administered by the Departments of Labor, Education, and Health and Human Services. A recent GAO (2011) report identified substantial duplications in services provided by these programs and noted the existing structure results in administrative inefficiencies. SCSEP was one of only three programs the GAO identified as having no overlap with other programs. The Workforce Investment Act of 1998 specified a "OneStop" system which was intended to create a consolidated delivery model with closer coordination among the various employment and training programs. But in reality there is substantial variance among states in the level of coordination and consolidation.

- **Serving Older Workers**

The changing age structure in the U.S. has resulted in a greater number of displaced older workers seeking the services of WIA programs. Older workers make up a larger proportion of the workforce and a greater proportion of the unemployed than in prior decades. Without exception, all key informants noted special challenges faced by older workers seeking new employment. Many had been employed by a single employer for several decades, and thus have

little or no experience in preparing a resume or in job interviewing. Job loss at older ages can be an especially traumatic occurrence, especially for older men who have traditionally been the primary breadwinner for their family. It is not uncommon for older workers to go through a grieving process following job loss or to experience mental health problems, such as depression or anxiety disorders. For many older workers, it has been several decades since they were in school; if mathematical and verbal skills were not regularly used on the job, they may be out of practice. Lack of computer skills is also an issue for many older workers. And of course there is the issue of ageist attitudes by potential employers. Acknowledgement of these barriers, and availability of resources to address them, are key to achieving positive program outcomes for older workers.

- **Flexible, Collaborative, and Participant-centered Training Programs**

SCSEP serves workers aged 55 and older who are not considered to be "job ready." In order to become job ready, they may need basic education (reading, mathematics, and written communication) in addition to skills training. Providers of adult basic education (ABE) and literacy services are required partners at WIA OneStops. WIA key informants reported that ABE services were provided to older clients who lacked those skills. Nearly all key informants reported a shortage of funds to establish individual training accounts (ITAs). Recently, there has been an increased focus on shorter term training that would result in a credential or certification to qualify the participant for jobs currently in demand. One key informant described a multi-year stakeholder process in which industry partners worked with the local Worker Investment Boards (WIB) to develop, and sometimes provide site-based instruction for certifications that would be recognized and valued by local employers. In addition, community colleges play an important role in workforce development in the United States.

- **Leveraging Resources**

Leveraging resources, whether through coordinating services with required partners or from other sources, is key to the success of most OneStop operators. Many examples of leveraging resources were identified including donations of computers and software, fundraisers, funding from grants to continue old or implement new programs, and using volunteers to perform key functions (e.g., retired educators and human resource executives). Over the past several years, both Microsoft and IBM have donated software and computers for workforce training.

- **Partnerships and Collaborations**

Partnerships and collaborations were the rule rather than the exception for the successful programs. Many of these partnerships were long-standing, which was an important asset for seeking additional funding opportunities. If a grant is not available from typical workforce sources, the partner may have sources that could be pursued. While some key informants reported partnering with other Worker Investment Boards (WIBs), they also reported partnering with employers, such as hospitals, to obtain grants for health care training. Well established relationships with employers can lead to opportunities for further collaboration. Many key informants commented on the important role libraries play for their program participants (as a computer access point), especially in rural areas where OneStops may not be conveniently located.

- **Employee Relationships**

Workforce Investment Boards, both at a state and local level, are structured to recognize the important role employers play in WIB activities and decision making. WIA key informants uniformly stated that they have two clients: employers and employees. Strong working

relationships with employers, and maintaining a track record of referring successful job candidates were emphasized by many key informants.

Successful state and local WIBs, and OneStop operators, spend considerable resources in developing employer relationships. One local WIB representative reported that 15-20% of employers in the area rely on them for employment services. This was accomplished through a sector or cluster strategy in which similar industries were clustered and involved in ongoing advisory, planning, and problem-solving partnerships with the WIB. This structure made it easier to identify specific skills required by the cluster and guided the expenditure of training funds. Strong employer relationships can also play an important role in implementing a successful on-the-job training program.

- **Measuring Outcomes**

While all key informants reported that training funds were used to qualify participants for jobs in demand, only a few analyzed the outcomes to identify net impacts. Washington has completed several net impact evaluations since WIA programs were implemented there; the state used the results of those evaluations to structure their programs to improve effectiveness. Their I-BEST program provides an example of how their research was used to improve program outcomes. WIA performance data only tracks reemployment income for 4 quarters whereas the state of Washington uses 10 quarters in their net impact analysis; their view is that longer term outcomes are an important indicator of program benefits. One key informant expressed frustration with the lack of the availability of current and complete performance data to help inform decision making on the most effective training programs. Availability of information on program outcomes at a local level could allow decision makers to make better use of limited training funds.

**Conclusion**

The SCSEP, WIA Adult and the Dislocated Workers employment and training programs will continue to play an important role in meeting the needs of older workers. While progress has been made in more fully integrating the partners in the workforce system, its complex structure with multiple funding streams creates many challenges to achieving a seamless delivery of program services to older workers. Collaborations among workforce partners are key to avoiding gaps and minimizing overlap in providing services to older workers. Strategic partnerships have become increasingly important to both service delivery and leveraging resources to obtain additional funding from both public and private sources.

Publicly sponsored employment and training services will continue to play an important role in meeting the need of older workers, but limited resources will create additional challenges in providing those services. Identification of strategies that produce the best outcomes, along with collaborations and partnerships to leverage both public and private resources will be crucial to meeting the employment and training needs of an aging population. The examples presented in this report provide opportunities to do so. By 2019, the entire baby boomer cohort will have reached age 55. The workforce system will need to have programs in place to meet the needs of this cohort.

**BACKGROUND**

The aging of the baby boomer cohort, which includes about 78 million people born between 1946 and 1964, will result in substantial changes to the age structure of the U.S. population over the next several decades. In 2010, 60% of the population was aged 20 to 64, but by 2030, the proportion of this working age group will decline to 55%. Dependency ratios, which are indicators of the potential burden on those in the working age population, are projected to increase from 67 to 85 between 2010 and 2050. The old-age dependency ratio (the proportion of those aged 65 and over to those aged 20 to 64 multiplied by 100), is projected to increase from 22 to 35 between 2010 and 2030 (Vincent & Velkoff, 2010). Reflecting the aging of the baby boomer cohort, the age distribution of the workforce has also changed; the proportion of the labor force aged 55 and older was 12.4% in 1998, 18.1% in 2008, and is projected to be 23.9% in 2018 (Toossi, 2009). The changing age structure of the U.S. population over the coming decades will place significant demands on social insurance and social welfare programs. Implementing programs, such as those encouraging work at older ages, could reduce the burden placed on younger age groups. If workers delayed retirement by five years relative to current plans, additional revenues generated by income and payroll taxes would extend the solvency period of the Social Security Trust Fund as well as increase the production of goods and services, which would spur economic growth (Butrica, Smith, & Steurele, 2006).

**IMPORTANCE OF TRAINING PROGRAMS FOR OLDER WORKERS IN TODAY'S ECONOMY**

Those aged 55 and over have experienced a rapid increase in unemployment rates since the beginning of the 2007 recession. In August 2010 the unemployment rate for people aged 55

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and over peaked at 7.3%, compared to 3.2% at the beginning of the economic downturn in December 2007. Those with less education, especially men, have experienced the highest rates of unemployment for this age group. In May 2011, the unemployment rate for men with less than a high school degree aged 55 and over was 9.8% as compared to 5.5% for those with a college degree, whereas the unemployment rate for women with less than a high school degree was 9.6% and 4.5% for those with a college degree. The number of discouraged workers aged 55 and older no longer seeking employment was 308,000 in December 2010, compared to 202,000 in December 2009. The large number of older discouraged workers who are no longer seeking work may result in an understatement of the unemployment rate (BLS, 2011).

An even larger number of workers aged 55 and over withdrew from the labor market for other reasons, such as poor health or family responsibilities; in May 2010, 156,000 workers aged 55 and over withdrew from the labor market for reasons other than discouragement and a year later that number grew to 316,000 (BLS, 2011). Many of the workers in both of these categories have simply retired. In 2009, 3.2 million men and women aged 62 and older received new Social Security benefits, the highest number since Social Security began paying benefits in 1940. New enrollees at age 62 receive monthly benefit payments that are up to 30 percent less than their benefit would have been at full retirement age (between 66 and 67, depending on age cohort). The growth in the age 62 and older population accounts for part of this increase, but older adults were more likely to claim benefits than they have in the past. Take-up rates (the number of new retirement awards in a given year divided by the number adults aged 62 and older who had not yet started collecting benefits at the start of the year) were 25.8% for men in 2009, up from 21.2% in 2007. For women, the take-up rate increased from 32.9% to 36.6% over the same period. This increase in Social Security take-up rates reflects the weak economy and high

unemployment rates for older workers. Early receipt of Social Security payments results in permanently reduced benefits, which can endanger future economic security (Johnson & Mommaerts, 2010). Policies that extend the working lives of older adults and delay receipt of Social Security benefits could both improve the retirement security of the worker and improve Social Security's finances (Stapleton, 2009).

When older adults become unemployed, it takes them longer to find a new job than their younger counterparts and they generally experience a greater decline in wages when they become reemployed. In May 2011, the mean duration of unemployment for those aged 55 to 64 was 55.7 weeks compared to 20.2 weeks at the beginning of the recession (December 2007) and an average of 29.3 weeks in 2009; these durations were the longest for any age group. In May 2011, 58% of unemployed workers aged 55 to 64 had been out of work for 6 months or longer (BLS, 2011). In addition to experiencing longer periods of unemployment, older workers, especially those with less education, are more likely to experience job loss, are less successful in achieving former earnings levels, and are less likely to have sustained employment after returning to work (Johnson & Mommaerts, 2011; O'Leary & Eberts, 2007). Johnson and Mommaerts (2011) found that displaced men aged 50 to 61 experienced median hourly wages 20.1% lower in reemployment as compared to a 4% decline for men age 35 to 49. Displaced men aged 62 and older experienced even greater wage losses with a 35.6% decline in reemployment. Older women also experience wage losses in reemployment, but there was less variation by age group; median hourly earnings for women aged 50 to 61 were 21.1% lower in a new job and were 10.2% lower for women aged 35 to 49 (Johnson & Mommaerts, 2011).

Those who experience involuntary job loss at older ages (60 and above) are less likely to work full time, if they work at all. Those who do become employed are more likely to experience

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job loss again. These employment patterns are likely to result in a substantially reduced standard of living in retirement. Remaining employed at older ages can be critical to retirement income security (Sass & Webb, 2010). When seeking new employment, older workers often have a narrower choice of jobs than their younger counterparts, possibly due to the unwillingness of employers to provide firm specific training (Hutchens, 1988, 1993). The frequency of older worker new hires varies by occupation, compensation level, skill requirements, and working conditions. For example, older workers are less likely to be hired in occupations with steep wage profiles, pension benefits, union coverage (for men), and computer usage (Hirsch, Macpherson, & Hardy, 2000). With limited resources, it is especially important to consider the outcomes for older workers who participate in the federal Work Investment Act (WIA) training services to identify which training methods produce the most positive outcomes (e.g. higher entered employment rates).

**BARRIERS TO REEMPLOYMENT**

Existing literature suggests that unemployed older workers may face multiple barriers to reemployment that can reduce their likelihood of finding jobs and remaining employed. Ageist attitudes by potential employers, self-imposed ageist barriers, depressive disorders, chronic disease, mismatch of skills with employer needs, and lack of computer skills are just a few of these barriers. Understanding these barriers, and addressing them, will be crucial for effective development of the older workforce. The next sections review these employment barriers that confront some older workers.

**Ageism**

Robert Butler coined the term ageism, which he described as "a stereotyping of and discrimination against people because they are old" (Butler, 1989, p. 139). Butler (1989) further

suggests that "older persons themselves need to be productive and develop a philosophy on aging if we are to fight ageism; survival is closely associated with individuals' views of themselves, as well as their sense of continued usefulness" (p. 145). In other words, to fight ageism, it is important for an older adult to convey a positive attitude about aging and to remain productive. Age stereotypes in the workplace involve beliefs about workers based on their age; they are often subtle but may result in age discrimination. These stereotypes influence outcomes, such as lower ratings in job interviews (or lack of opportunity to have an interview) and performance assessments (Lahey, 2006; Posthuma & Campion, 2009). Age stereotypes are most common in finance, insurance, retailing, and information technology industries (Posthuma & Campion, 2009).

Research tends to contradict ageing stereotypes of older workers seeking employment. In general, there is no consistent pattern of superior performance by any age group. Older adults may have slower reaction time and loss of visual acuity, hearing, and strength, but they compensate for these problems through their evaluative skills and wisdom. Older workers are willing to learn and acquire new information, but they may be less informed than younger workers at the beginning of training sessions. Attendance is better for older workers and they tend to be more reliable, loyal, motivated, and committed to the organization (Reio & Sanders-Reio, 1999). Altering negative attitudes about ageism may be possible by providing people with accurate information, but reinforcement of that accurate information through discussions and verbal encouragement is necessary to accomplish long-lasting attitudinal changes (Ragan & Bowen, 2001). Management trainers are an example of a group that may have stereotypes about older workers. Trainers sometimes think that older workers are less trainable, set in their ways, are unable to learn new things; in fact, many older adults want to learn and have less need to be

entertained (Reio & Sanders-Reio, 1999). Those who work with older adults in employment programs, including OneStop settings, need accurate information about older workers, and this information needs to be reinforced through multiple sessions. Older adults may underestimate their capacity to learn, but in the right setting, they are quite capable of learning new skills (Hamil-Luker, & Uhlenberg, 2002). Developing effective training strategies for older workers is important to their success in the workplace and in determining the types of jobs that will be available.

**Mental and Physical Health**

Both unemployment and underemployment have been linked to declines in mental health, alcohol abuse, and lower levels of physical health (Dooley, 2003; Friedland & Price, 2003). Workers nearing retirement, especially those with lower incomes, may be especially vulnerable to depressive symptoms with involuntary job loss. Inability to sustain their household during long periods of unemployment may contribute to declines in mental health for older workers and these symptoms may continue if unsuitable jobs are accepted (Gallo et al., 2006). Less than optimal jobs in reemployment, or being "underemployed" is associated with poorer physical and mental health; those age 62 and over are more likely to be employed in inadequate jobs (i.e., part-time work when full-time work is desired or for wages lower than previous employment) than their younger counterparts (Grzywacz & Dooley, 2003), possibly because of fewer new employment options. Sum, Khatiwada, and Trubskyy (2011) estimated that 14% of older employed low-income workers are underemployed. Underemployment at older ages has economic as well as health implications. Job loss accompanied by perceived lack of social support is associated with depression and physical health complaints (Mallinckrodt & Fretz, 1988).

Mental health interventions may be required for lower income older workers who have experienced involuntary job loss and for those experiencing long-term unemployment (Gallo et al., 2006). Loss of self-esteem often accompanies unemployment and can be a threat to mental health, resulting in anxiety and depression; in turn, these mental health issues can be an impediment to searching for new employment. Assertive behaviors, which may be necessary for a job search, are often difficult for those experiencing depressive symptoms (Guindon & Smith, 2002; Moorhouse & Caltabiano, 2007). Those who have experienced involuntary unemployment often go through a grieving process, which can involve feelings of denial, anger, bargaining, depression, and frustration, indicating a substantial loss in life involvement. Employment counselors, including those working at OneStop career centers, should be trained to recognize these symptoms and to make appropriate referrals to mental health specialists. This might be accomplished through developing working relationships with mental health counselors, mental health community agencies, and psychiatrists (Guindon & Smith, 2002). Some OneStops have partnered with agencies that provide mental health services and it is quite common for workforce intermediaries to make referrals to mental health specialists.

**Education and Training Challenges**

Normal aging, such as declines in vision, slower response time, and hearing losses, can put the older worker at a disadvantage relative to their younger counterparts. In addition, many older workers lack experience with computers and other technology. Better training and adaptive devices can help minimize age differences. For example, larger monitors and adjusting the frequency of auditory warnings might improve learning outcomes for older workers, as well as younger workers. Limited access to computers and a slower learning rate can be barriers to older workers acquiring new technology skills. Attitudes toward technology can also be a barrier to

older workers; individuals may be intimidated by learning a new technology and employers may be reluctant to offer such training opportunities to older workers (Charness, 2006). Despite age related changes and perceived attitudinal barriers to learning new technologies, older adults are quite capable of using computers for a variety of tasks (Czaja & Moen, 2003).

Older learners are a heterogeneous group, with different learning styles. In addition, older learners are increasingly ethnically diverse and as a group, they are more likely to have disabilities than their younger counterparts. Research is lacking on optimal training techniques for older workers, perhaps because older adults are a very heterogeneous group, but some techniques have been effective. In order to provide effective training, the instructor needs to be adept at multiple learning styles. Older adults may underestimate their capacity to learn, but in the right setting, they are quite capable of learning new skills (Hamil-Luker, & Uhlenberg, 2002). It can take older workers longer to learn a new task, perhaps as much as 50-100% longer. For example, older adults may need more hands on practice than their younger counterparts and lectures may need to be at a slower pace. Hands on learning with frequent feedback have been effective strategies for many older learners. Older adults often may find it difficult to learn if there are distractions; the training environment should allow older adults to focus on the task at hand with minimal background noise (Charness & Czaja, 2006). Some older adults have difficulty with fine motor skills and as a result, have problems using a computer mouse. Using a light pen or touch screen, along with practice, might benefit the older computer user (Charness, Holley, Feddon & Jastrzembski, 2004). Hierarchical organization of information where the instructor emphasizes the most relevant points is also an effective strategy for teaching older learners. The material should be well organized and an active learning situation should be provided (Willis, 2004).

Developing effective training strategies for older workers is important to their success in the workplace and in determining the types of jobs that will be available. Because older adults are often less able to perform physical work, learning new skills, such as using the computer, is especially important for those who want to remain in the workforce at older ages. Older adults are quite capable of using computers, but stereotypes make it more likely for younger rather than older workers to be offered training. Another challenge some older adults face, especially those with limited resources, is lack of access to computers (Czaja & Moen, 2003). Cresci, Yarandi, and Morrell (2010) found that of urban older adults, 31.7% did not regularly use the internet. Those who did not use the internet had less education and are less likely to have a driver's license, making access to computers at a library more difficult. Access to online learning programs for low-skill workers is a viable option, but is contingent on having access to both a computer and high-speed internet. In order to participate, students need basic computer skills and must be self-disciplined. A blended model which includes both online and in-class learning might be the best approach for effective learning (McKay & Gatta, 2009).

**THEORETICAL FRAMEWORK**

Human capital theory proposes that both individuals and society benefit from investments in people and that investments in human capital are important to improving economic growth and production (Becker, 1962; Schultz, 1961; Sweetland, 1996). Differences in human capital, which includes education as well as workforce experience over the life course, contribute to an accumulation of advantage or disadvantage, and greater income and health disparities at older ages (O'Rand, 2002, 2006). Those who have benefited from human capital investments over the life course tend to have better employment and earnings outcomes (Farkas, 2002). This concept is widely referred to as "cumulative advantage" (Dannefer, 2003; Ferraro, Shippee, & Schafer,

2009). Cumulative disadvantage can occur when individuals do not have employment and

educational opportunities and, without resource mobilizations such as employment and training

programs, can result in increased inequality over time (Ferraro et al., 2009). Well-structured

employment and training programs that reduce inequalities provide an additional benefit beyond

economic growth. Figure 1 illustrates how resource mobilizations, such as training for a new

occupation, can affect employment outcomes depending on the timing and duration of the

intervention. As shown in the illustration, resource mobilizations may need to be of longer

duration with increasing age because of accumulated inequality (Ferraro et al., 2009). As a result,

shorter term interventions with modest investments will likely only produce modest results

Figure 1. *Illustration of unemployment pathways affected by the onset and duration of resource mobilization*

Unemployment



Time
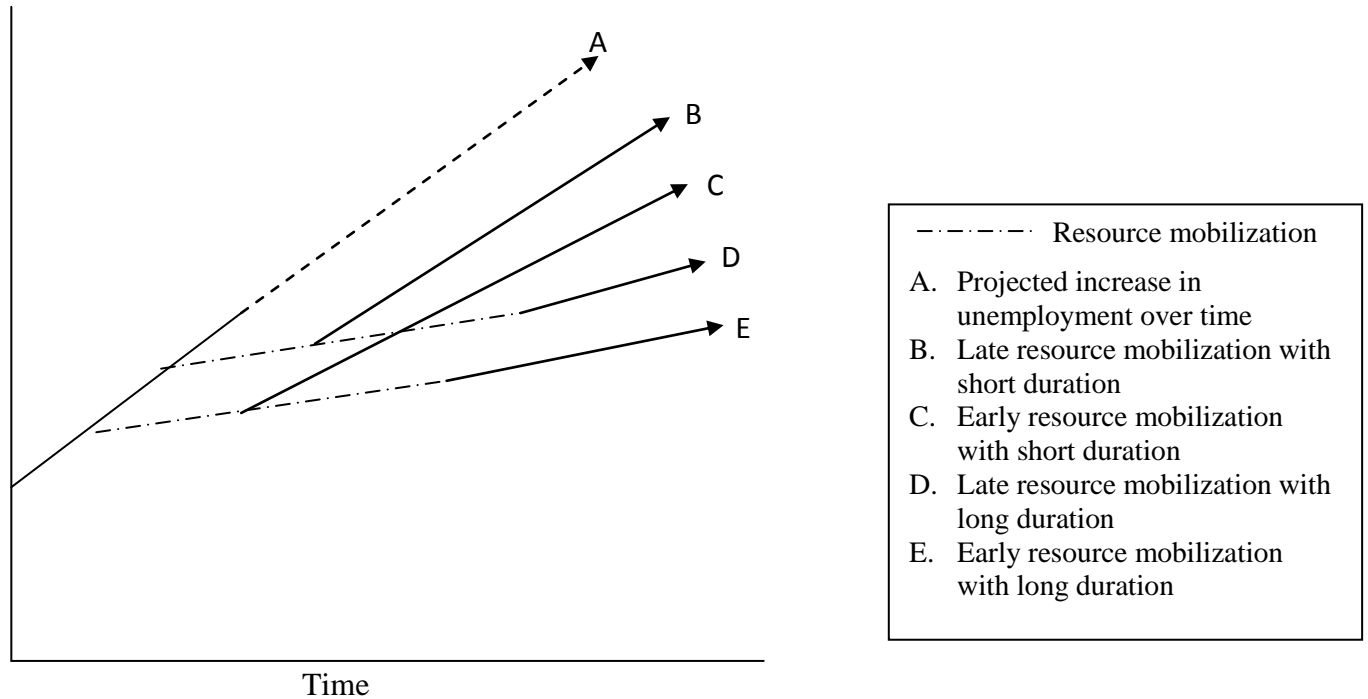
Adapted from Ferraro, K. F., Shippee, T. P., & Schafer, M. H. (2009).

(Holzer, 2008), especially for older workers. Resource mobilizations to improve employment prospects for older adults might include comprehensive employment and training programs that would help reduce inequalities that have occurred over the individual's life.

**SUMMARY**

Increases in labor force participation rates by older workers combined with high unemployment rates and lengthy periods of unemployment have resulted in an increase in demand for publicly sponsored employment and training programs by older workers. Examination of promising practices for employment and training programs as they relate to older workers are an especially important and timely issue. Unemployment at older ages can result in multiple adverse events, including forced retirement at reduced income, as evidenced by the recent increase in those receiving Social Security benefits at age 62 (Johnson & Mommaerts, 2010). Early retirement can result in long lasting reductions in economic well-being and increase the risk of poverty in old age (Coile & Levine, 2010; Gustman, Steinmeier, & Tabatabai, 2009). Older adults who return to the workforce, or have lost their jobs, may not have the skills required for available jobs and as a result, may need to participate in employment and training programs to facilitate their job search. Most unemployed older adults must manage their reemployment process without assistance from a former employer. Older unemployed workers, especially those with limited resources, may need to rely on either government or nonprofit organizations to assist in their job search (Heidkamp & Van Horn, 2008). Employment programs that are structured to meet the needs of older workers have the potential to improve their economic security and at the same time strengthen the overall economy (Johnson, 2009). Training programs are typically more cost effective during periods of high unemployment; costs attributed to lost wages are lower and earlier reemployment is achieved (Lechner & Wunsch, 2009).

For all of the reasons noted above (age structure of the population, desire and/or need to stay in the labor force, increased employment challenges facing older workers), the existence of effective and efficient employment and training programs to enhance the economic self-sufficiency of older adults has perhaps never been more important. By 2019, the entire baby boomer cohort will have reached age 55. The workforce system should have programs in place to meet the needs of this influential cohort.

The current research sought to identify successful collaborations among workforce partners, along with innovative and promising practices in providing employment and training services to older workers. This was accomplished through a combination of review of relevant literature and documents, analysis of program performance data, and key informant interviews. Key informants included Senior Community Service Employment Program (SCSEP) and Workforce Investment Act (WIA) program administrators at a state and local level, workforce intermediaries, and community college officials. This research should provide useful information for policymakers seeking to implement programs to meet the needs of an aging workforce.

**RATIONALE FOR FOCUS ON WORKFORCE INVESTMENT ACT PROGRAMS, WORKFORCE INTERMEDIARIES, AND COMMUNITY COLLEGES**

The three major job training programs that benefit older adults are (a) the Senior Community Service Employment Program (SCSEP), which is provided under Title V of the Older Americans Act (OAA), (b) the Adult and the Dislocated Worker employment programs, both provided for in Title I-B of the Workforce Investment Act (WIA) of 1998, and (c) the Trade Adjustment Assistance (TAA) and Alternative Trade Adjustment Assistance (ATAA), which are provided for under the Trade Adjustment Assistance Reform Act of 2002 as amended by the Trade and Globalization Adjustment Act of 2009. The Employment and Training Administration

(ETA) of the Department of Labor (DOL) administers all three programs, but a proposal in the administration's FY2012 budget plan would transfer responsibility for SCSEP to the Administration on Aging (AoA) (DOL, 2011).

WIA consolidated several programs into a single funding source for all participants. The Wagner-Peyser Act of 1933 created the first national employment program. Wagner-Peyser was part of the New Deal legislation passed in 1933 and focused on addressing the high levels of unemployment during the Great Depression. It was amended in 1998 and is now included in Title III of WIA (Bancroft, 2002). Other job training programs that were consolidated into WIA include the Manpower Development and Training Act (MDTA) of 1962, The Comprehensive Employment and Training Act (CETA) of 1973, and the Job Training Partnership Act (JTPA) of 1982. The Adult Education Act of 1992, the National Literacy Act of 1991, and the Rehabilitation Act of 1973 were also consolidated into WIA (Cohen, Timmons, & Fesko, 2005). Wagner-Peyser and JTPA both focused on unemployed workers and the disadvantaged, but did little to provide training to workers or assist them in securing jobs at higher pay. WIA programs expanded their role beyond assisting the unemployed and disadvantaged to provide those additional services (Bancroft, 2002). The JTPA required that 5% of its appropriation for adults be allocated specifically for older worker services, but there is no similar requirement in WIA. As a result, employment and training providers may be less likely now than in the past to establish separate programs for older workers. For example, prior to its elimination, 9% of JTPA program participants were aged 55 and above whereas in the early years of WIA, 6% of program participants were in that age group (Abraham & Houseman, 2005). The Workforce Investment Act Amendments of 2005 reauthorized appropriations through fiscal year 2011 and include provisions to strengthen the OneStop Career Centers and make the program more demand driven

and responsive to employer needs, including the needs of small businesses. Many of the changes included in the amendments pertain to enhancements for youth programs; there were few changes to benefit older adults (Library of Congress, 2006).

SCSEP and WIA programs benefited from additional funding in Program Year 2009 (PY 2009 was July 1, 2009 through June 30, 2010) through the American Recovery and Reinvestment Act of 2009 (ARRA). SCSEP served approximately 90,000 older workers in PY 2009 whereas WIA programs (Adult and Dislocated Worker) served over 200,000 workers aged 55 and over and TAA served about 29,000 older workers during the same period. In a 2003 report, the General Accounting Office reported that of adults aged 55 and over enrolled in these three programs, 68% received services from SCSEP (GAO, 2003) whereas in 2009, 28% received services through SCSEP. The proportion of WIA program (combined Adult and Dislocated Worker) participants aged 55 and older increased from 8.6% in 2005 to 13.3% in 2009. While WIA programs are becoming increasingly important to older workers, they are less likely than their younger counterparts to receive specialized training. For example, in PY 2009, participants in the adult WIA program aged 55 and older made up 11.6% of those leaving the program, but represented only 6.8% of those receiving training services and 5.2% of those with an Individual Training Account (ITA) prior to program exit (Social Policy Research Associates, 2010).

Both SCSEP and WIA programs will experience a decline in funding from program year 2010 to 2011. Effective July 1, 2011 SCSEP funding will be reduced by 45.5% whereas funding for the WIA Adult and Dislocated Worker programs will be reduced by 10.6% and 8.8% respectively. The President's 2012 budget request would return WIA program funding to 2010 levels, but SCSEP funding would remain at 2011 levels. Funding information for the WIA and

SCSEP programs is shown in Table 2. Although SCSEP program operators expect to serve about

70,000 people in PY 2011, reduced SCSEP funding will result in about 46,000 authorized slots

(i.e., community service positions), a substantial reduction from 2009 (DOL 2010; DOL, 2011;

Oates, 2011a). Most of these positions are already taken by current SCSEP program participants.

Several SCSEP grantees have expressed concern about their ability to take new program

participants in PY 2011.

Table 1. *Acronyms*

| | |
|---|---|
| ABE | Adult Basic Education |
| AoA | Administration on Aging |
| ARRA | American Recovery and Reinvestment Act of 2009 |
| BLS | United States Bureau of Labor Statistics |
| DOL | United States Department of Labor |
| ETA | Employment and Training Administration |
| GAO | Government Accountability Office or its predecessor, General Accounting Office |
| GED | General Educational Development (high school equivalency diploma) |
| ITA | Individual Training Account |
| JTPA | Job Training Partnership Act |
| MOU | Memorandum of Understanding |
| OAA | Older Americans Act |
| OJE | On-the-Job Experience |
| OJT | On-the-Job Training |
| PY | Program Year, which runs from 7/1 of one year to 6/30 of the next |
| SCSEP | Senior Community Service Employment Program; Title V of OAA |
| TAA | Trade Adjustment Assistance |
| ATAA | Alternative Trade Adjustment Assistance |
| WIA | Workforce Investment Act |
| WIASDR | Workforce Investment Act Standardized Record Data |
| WIB | Workforce Investment Board |

Table 2. *Program Funding (in millions of dollars) and State Allocation Description*

| | 2009 Enacted | American Recovery and Reinvestment Act (ARRA) of 2009 | 2010 Enacted | 2011 Enacted (4/15/11) | Percent Change 2010-2011 | 2012 Requested President's Budget (2/14/11) |
|---|---|---|---|---|---|---|
| SCSEP | 572 | 120 | 825 | 450 | (45.5%) | 450 |
| WIA Adult Program | 862 | 495 | 862 | 771 | (10.6%) | 861 |
| WIA Dislocated Worker Program | 1,341 | 1,436 | 1,413 | 1,288[1] | (8.8%) | 1,404 |
| Total | 2,775 | 2,051 | 3,100 | 2,509 | (19.1%) | 2,715 |

1. Includes $224 million for Dislocated Worker National Reserve.

WIA Adult and Dislocated Worker programs have separate funding streams and as a result, have different funding formulas. For the Dislocated Worker program, 80% of the funds are distributed to the state and local areas and 20% are reserved for emergency and demonstration grants. For the Adult worker program, the entire amount goes to the states, but the state retains 15% of the funds and distributes 85% to local areas, although for the 2011 program year, the states will only retain 5% of funds. For each program, the federal allocation to the state (which in the case of the dislocated worker program is 80% of total funding) is divided into thirds, and each state's share is based on the following:

WIA Adult:
- State's relative share of total unemployed in areas of substantial unemployment (average unemployment of 6.5% or greater for the 12 month period ending 6/30)
- State's relative share of excess unemployed (average unemployment in excess of 4.5% for the 12 month period ending 6/30)
- State's relative share of economically disadvantaged youth (2000 Census)

WIA Dislocated Worker:
- State's relative share of total unemployed (average for the 12 month period ending 6/30)
- State's relative share of excess unemployed (average unemployment in excess of for the 12 month period ending 6/30)
- State's relative share of long-term unemployed (average number unemployed for 15 or more weeks in the previous calendar year)

After state funding is determined, the Workforce Investment Board is responsible for developing the formula to allocate funds to local workforce areas. The general philosophy is that funds should be provided to local areas on the basis of socioeconomic factors, such as poverty and unemployment.

***Sources***: AoA (2011); Oates (2011a); Oates (2011b); DOL (2010); DOL (2011).

**WORKFORCE INTERMEDIARIES**

Beyond these publicly-funded programs, workforce intermediaries have played an increasingly important role in workforce development, partially due to the uneven performance of public programs (Giloth, 2004). Workforce intermediaries serve both employers and employees and often combine both private and public funding sources. Intermediaries assist employers in identifying their skill needs so they can connect employers and employees. They assist workers, who are generally low-income, by providing them with training or supportive services, or referring them to others who provide those services. A diverse range of organizations act as intermediaries, including chambers of commerce, non-profit community based organizations, for profit temporary agencies, community colleges, labor-management collaborations, faith based organizations, and Workforce Investment Boards (Soukamneuth & Harvey, 2008).

Another important characteristic of intermediaries is their goal of connecting employees with employers who provide career ladders (Soukamneuth & Harvey, 2008). Intermediaries seek multiple funding streams and partners to achieve common goals (Fisher, 2005). They may also integrate both private and public programs and funding streams from sources such as foundations, private donations, and the Department of Labor (e.g. SCSEP funds). The most successful intermediaries go beyond job training and offer comprehensive services, which might include career and family counseling, support services, customized job training, job coaching, and post-program follow-up, including upgrade training in the context or career advancement (Giloth, 2004; Poppe, Strawn, & Martinson, 2004). Intermediaries focus on long-term job retention along with career advancement and consider family self-sufficiency. The structure of workforce intermediaries (i.e., generally private funding sources) allows them to make adjustments to their program to accommodate the needs of their clients (Giloth, 2004). Steering

committees typically play an important role in assisting intermediaries. They are often made up of community leaders who provide a vision and additional resources (Scott, 2007). Because intermediaries often work with the chronically unemployed, they frequently focus more on barriers (e.g., mental health issues, transportation, alcohol abuse, etc.) than do public programs (Phillips & Garrett, 2010; Poppe et al., 2004).

**COMMUNITY COLLEGES**

About 40% of WIA programs budgets are spent on ITAs and these training funds are often used at community colleges. WIA and community colleges have a shared goal of ensuring that workers are well prepared to meet employer needs, to provide qualified employees, and to encourage existing firms to expand and new firms to locate in their communities. Community colleges and OneStops have many opportunities to collaborate. For example, community colleges and OneStops sometimes act as partners in obtaining grants for innovative programs. Other examples of collaboration might include transitioning case management responsibilities from a OneStop to an academic or career counselor at a community college (Jacobson, Focarazzo, Sacchetti, & Benus, 2010). There has been increased focus by the Employment and Training Administration for WIA program participants to attain a credential, degree or certificate. Occupational certificates can often be earned in less than two years and are linked to higher earnings. This shorter training period might be especially attractive to older workers (Oates, 2010). Most community colleges are well positioned to provide training that would result in attainment of a credential, degree, or certificate. This occupational training is an important component of giving the participant opportunities to advance their career. While most community colleges are an important source of occupational training to create a career ladder for low-income workers, some community colleges are reluctant to work with WIA programs

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because of the need to comply with data reporting requirements (Osterman, 2005). Local WIBs

in California, Indiana, Massachusetts, and Michigan reported that community colleges are

reluctant to participate as training providers; they are operating at near capacity and don't want

the extra burden of data reporting requirements (GAO, 2005).

SCSEP budget reductions, combined with the availability of a wider array of services,

will result in an even greater number of older workers relying on WIA programs and workforce

intermediaries in the future. In addition, the age structure of the population has resulted in a

greater proportion of dislocated workers being aged 55 and above and thus using WIA services.

Community colleges play an important role in the workforce system by providing education and

training to qualify employees for jobs in demand. Their recent focus on educational programs for

older students seeking encore careers has served to increase their importance to older students

seeking to either upgrade their skills or change careers. For all of these reasons, in addition to

SCSEP this research project focused on WIA Adult and Dislocated Worker Programs and

community colleges.

## PROGRAM DESCRIPTIONS

Title I of WIA provides for the structure of the OneStop career centers ("OneStops"), as

well as the governance, eligibility, service delivery, resource allocation, and accountability of the

program. WIA requires that each state governor appoint a state Workforce Investment Board

(WIB). Members of the WIB typically include leaders in state government, business, industry,

and organized labor. The state WIBs are responsible for developing 5-year plans, coordinating

program delivery through local OneStops, and allocation of funds to local areas. Figure 2

describes the organizational structure of WIA programs for a typical state. Because of separate

funding streams and different program objectives, funding allocation formulas are different for

the WIA Adult and the Dislocated Worker programs. With that said, the general philosophy is

that funds should be provided to local areas on the basis of socioeconomic factors and unemployment rates (Oates, 2011b). A more detailed description of funding for SCSEP and WIA, along with WIA state funding allocations is provided in Table 2. In order to avoid confusion, the term "OneStop" will be used throughout this report; several states use different terminology to describe their OneStop career centers.

Program services for WIA and TAA are typically available at OneStop Career Centers (OneStops). SCSEP services are available at employment centers, but are generally in different locations and are operated by different grantees than WIA and TAA programs. With approximately 3,000 locations in the United States, employment services at WIA, TAA, and SCSEP employment centers are generally accessible to older workers and meet many of their job search needs (Eyster, Johnson, & Toder, 2008; Jacobson, 2009). SCSEP offers fewer and less extensive services than the WIA or TAA programs. For example, SCSEP does not generally offer specialized training that may be necessary to find new employment; older workers must rely on WIA or TAA programs for this training. SCSEP offers basic services similar to WIA core services to all program participants and, assuming funding is available, also provides opportunities for part-time community service training with a host agency. SCSEP program participants work an average of 20 hours per week and earn the highest federal, state, or local minimum wage. The job training assignment placement is with a public or non-profit organization, such as schools, senior centers, or hospitals, and the expectation is that the participant will use this work experience to find permanent employment that is not federally subsidized (DOL, 2009). Although not widely used, WIA programs offer on-the-job training experiences whereby the employer and program share the cost of wages. The proportion of wages that are reimbursed vary by program and depend on employer size and the length of the

Figure 2. *State Workforce Investment Boards – Structure and Responsibilities*

**Governor**
Appoints and Serves on State Workforce Investment Board

**State Workforce Investment Board**
Appointed by governor:
- 2 Members of each chamber of state legislature
- Business owners and executives
- Business trade association representatives
- City and County elected officials
- Representatives of labor organizations
- Representatives of education
- Representatives of community based organizations

Responsibilities:
- Develop state workforce plan
- Develop methods to coordinate services among programs
- Designate local workforce areas and selects members
- Allocate and distribute funds to local areas
- Develop statewide employment statistic system

**State Agencies or Departments**

Responsible department(s) varies by state, but might include those responsible for workforce development, commerce, jobs and family services, economic development, higher education, and/or health and human services.

**Local Workforce Investment Boards**
Membership:
- Local business owners
- Local business and trade organizations
- Representative of labor organizations
- Representatives of education
- Economic development representatives
- Representatives of OneStop partners
- Representative of community organizations

Responsibilities:
- Develop local workforce plan
- Establish competitive process to award grants and contracts to one-stop operators, service, and training providers

**OneStops**
Provide services under WIA Adult & Dislocated Worker programs

**Training Providers**
- Community Colleges
- Vocational training

**Program Participants**

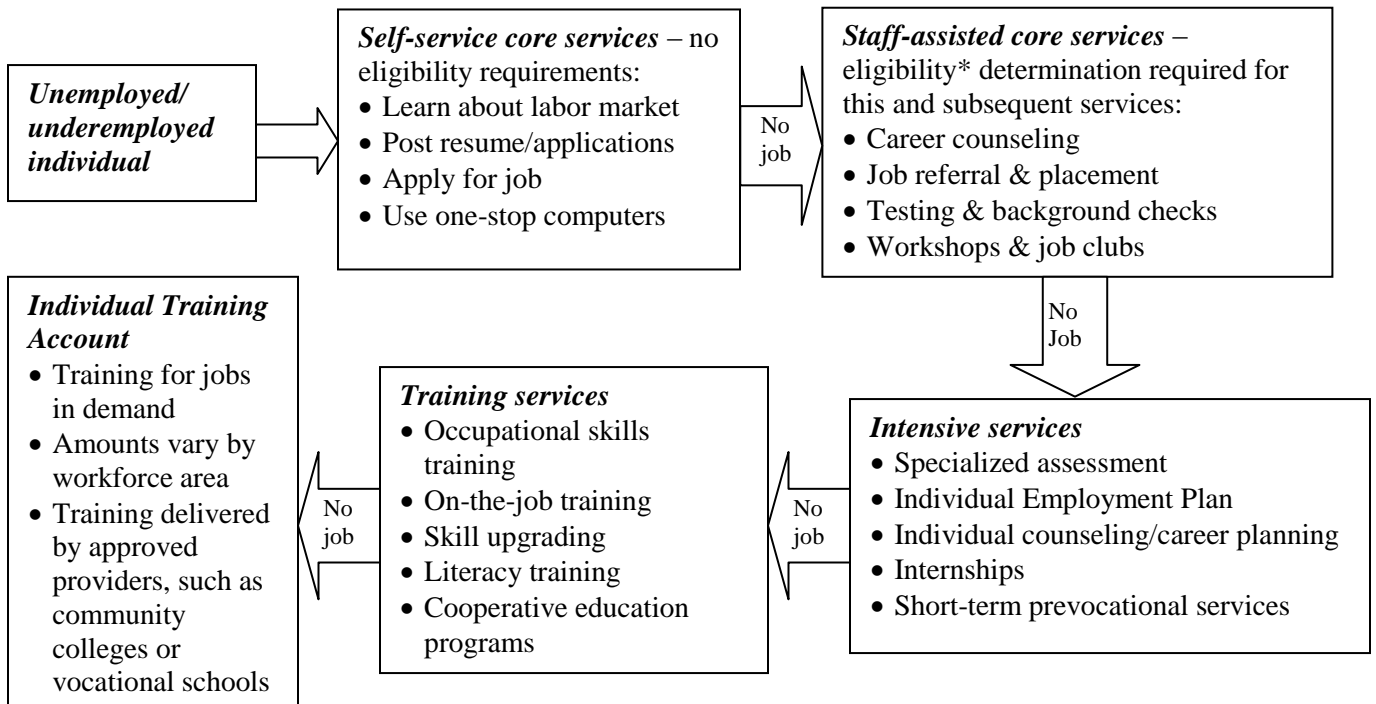*Source*: Workforce Investment Act of 1998

training assignment. The intent of these programs is that, assuming the program participant has

performed satisfactorily, the employer providing the on-the-job training would hire the

participant on a permanent basis at the end of the training period (Workforce Investment Act,

1998). On the job training that connects employers to employees as a business proposition may

have better outcomes for all parties involved (Osterman, 2005).

Three levels of services are available for WIA Adult and Dislocated Workers: core,

intensive, and training. Participants typically move through these service levels sequentially.

There is no specific guidance in WIA for the length of time the program participant stays in the

program before becoming eligible for training; state and local WIBs have responsibility for

establishing criteria. There are several core services that are available on a universal basis and

there are no eligibility requirements. A description of the services at each level and their

sequence are summarized in Figure 3. It is generally required that participants in the Adult

Worker program are low-income, but WIA provides state and local WIBs significant latitude in

defining low-income. Eligibility is determined prior to receiving staff assisted core services.

WIA Adult and Dislocated Worker programs are intended to serve the most disadvantaged

groups; program participants must be underemployed, unemployed, and/or low-income. Priority

for staff assisted core, intensive, and training services must be given to recipients of public

assistance and other low-income groups when funds are limited. Eligibility requirements for

WIA Adult and Dislocated Worker programs are summarized in Appendix A.

An Individual Training Account (ITA) is a voucher system whereby an individual

receives a specified amount for a training program. The training must be for an occupation

currently in demand in the workforce area and be provided by a vendor approved by the local

WIB. Availability of training funds and the perceived likelihood of a positive outcome from

Figure 3. *Program Services for WIA Adult and Dislocated Worker Programs*



**Unemployed/ underemployed individual**

**Self-service core services** – no eligibility requirements:
- Learn about labor market
- Post resume/applications
- Apply for job
- Use one-stop computers

No job

**Staff-assisted core services** – eligibility* determination required for this and subsequent services:
- Career counseling
- Job referral & placement
- Testing & background checks
- Workshops & job clubs

No Job

**Individual Training Account**
- Training for jobs in demand
- Amounts vary by workforce area
- Training delivered by approved providers, such as community colleges or vocational schools

No job

**Training services**
- Occupational skills training
- On-the-job training
- Skill upgrading
- Literacy training
- Cooperative education programs

No job

**Intensive services**
- Specialized assessment
- Individual Employment Plan
- Individual counseling/career planning
- Internships
- Short-term prevocational services

*Sources*: ETA (2008); Workforce Investment Act of 1998.

participating in a specialized training program are factors in the operator's decision (Heckman & Smith, 2004). The operational model used by most local WIBs is the informed choice model; within certain parameters (i.e., the occupation must be in demand and the vendor must be on an approved list), the program participant and counselor jointly make the decision on the specific training. The duration of the training and the maximum dollar amount varies by workforce area and also by individual depending on the specific training to be undertaken (Wandner, 2010). In a review of 19 states and 57 local workforces, D'Amico et al. (2004) found the range of ITAs was $1,200 to $10,000 with a median and mode of $5,000. In Pennsylvania, a 2007 report provided information on ITAs by workforce area; the range at that time was $3,500 to $15,000. ITAs vary by individual depending on the length and type of training. During periods of high demand for

training funds, the local workforce boards may adjust their amounts available for ITAs in order to accommodate more people. More emphasis has recently been placed on ITA recipients earning a credential, such as an associate's degree or an occupational license (Oates, 2010). Examples of a credential would be a licensed practical nurse or a certification for a specific computer skill.

Given the increasing demand for employment and training programs for older workers, the complexity of the multiple systems that provide such services, and the need for information on effective and efficient strategies for serving the target population, this research project was launched.

## RESEARCH METHODOLOGY

The major goals of this mixed-methods research included gaining an understanding of the structure of the workforce system, locating examples of successful and replicable workforce partnerships and collaborations, and identifying promising practices for enhancing employment and training programs for older workers. Three types of research methodologies were utilized to accomplish these goals: a) a review and analysis of relevant literature and documents; b) analysis of secondary data to identify high-performing states in providing WIA program services to participants ages 55 and over; and c) key informant interviews with community college administrators specializing in programs for older learners, workforce intermediaries, state SCSEP program representatives, and WIA state and local program officials.

The review of literature and documents served several purposes. Research that identified successful strategies to address barriers such as ageism and lack of computer skills provided guidance for the interview protocols about promising practices. A review of government and

program documents (e.g. GAO reports and those either published by the Department of Labor or under their direction) provided information on the program structures, awarded grants, and other data that helped identify both innovative programs and barriers older workers might face in WIA program participation. An extensive web-search also provided information on activities in local workforce areas and other materials relevant to this research project.

Data provided by the U.S. Department of Labor was used to identify states that had above average outcomes in providing employment and training services to program participants aged 55 and above. Specifically, the "Public 2010Q1 WIASRD" (Workforce Investment Act Standardized Record Data) data file, which provided information on WIA Adult and Dislocated Worker program participants, were used to evaluate states in the following areas:

1. A high proportion of workers aged 55 and over as compared to other age groups.

2. Providing an ITA account to a relatively high proportion of workers aged 55 over.

3. Relatively high proportion of workers aged 55 and over entering employment.

4. Relatively high retention rates for workers aged 55 and over.

5. Relatively high earnings in reemployment for workers aged 55 and over.

Based on these screenings, top performing states were identified and key informants at the state and local levels were interviewed. Top performing states included Arizona, Florida, Iowa, Massachusetts, Pennsylvania, and Washington. Senior state-level WIA program officials were interviewed in each state. In addition, senior state-level SCSEP program officials were interviewed in Arizona, Iowa, Minnesota, North Carolina, and Ohio. A modified Delphi method was used to identify local workforce officials to interview in several of these states. For example, state officials in Massachusetts were asked to identify local areas that had innovative programs or were especially successful in serving older workers. This information, in combination with

further review of local level data in the Public 2010Q1 WIASRD file, was used to select two workforce areas in Massachusetts: Central WIB and Metro North WIB. Program officials in these two areas were then interviewed. This process was followed in each of the top performing WIA states.

In addition, several workforce intermediaries were also interviewed. Information provided by the intermediaries provided valuable information, especially with regard to leveraging funds and addressing barriers experienced by disadvantaged workers. Community colleges play an important role in meeting the needs of both employers and employees. Older adults have benefited from lifelong learning classes offered through community colleges for many years. More recently, community colleges have begun to focus on the demand by older workers for classes to become qualified for new occupations. Several years ago, the Atlantic Philanthropies partnered with the American Association of Community Colleges for the "Plus 50 Initiative." This program is intended to build the capacities of community colleges nationwide to develop academic programs that would engage learners aged 50 and above. Thirteen community colleges and five mentor colleges were included in this grant. Plus-50 program officials at several of these colleges were interviewed to gain a better understanding of the role they play in workforce development for older adults.

A total of 28 interviews were completed for this project, including discussions with:

- 6 state WIA program administrators

- 8 local WIA program administrators

- 6 state and local SCSEP program administrators

- 5 educators (four community college and one distance learning)

- 3 workforce intermediaries

**KEY FINDINGS**

**STRUCTURE OF WORKFORCE SYSTEM**

Federally funded employment and training programs exist in a complex, and sometimes confusing, system. At a federal level, most of the 47 different programs are administered by the Departments of Labor, Education, and Health and Human Services. A recent GAO (2011) report identified substantial duplications in services provided by these programs and noted the existing structure results in administrative inefficiencies. Significantly, SCSEP was only one of three programs the GAO identified that did not overlap with other programs. The Workforce Investment Act of 1998, which specified the structure of the OneStop system, was intended to create closer coordination among employment and training programs by requiring a consolidated service delivery system through OneStop centers, but in reality few programs have been consolidated. This law and subsequent WIA policies designated 17 federal programs as required OneStop partners. Each local WIB is responsible for developing and entering into a memorandum of understanding (MOU) with the required partners. The intent was for the required partners to coordinate service delivery, but there is substantial variance among states in the level of coordination.

In some local areas, partners operate their programs separately, while in others, partners have a seamless delivery system. SCSEP is a required OneStop partner, but at some locations, the SCSEP operator may only staff their office for a few hours per week whereas at other OneStops, the SCSEP grantee or subgrantee has staff available on a full-time basis. Without full integration of service delivery (i.e. a seamless delivery of services such that the program participant may be unaware of the funding sources), additional challenges are created for SCSEP program participants to benefit from the services located at OneStops. For example, adult and

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basic literacy (provided for in WIA Title II) is a required OneStop partner but if SCSEP is not fully integrated, access to those services may be more cumbersome. Several OneStops include legal services and other community organizations as non-required partners; SCSEP program participants could benefit from improved access to those services.

**Administrative structure.** The structure of state level government can also present challenges to coordinating employment and training programs. For example, both WIA and SCSEP programs are housed in the Department of Economic Security in Arizona whereas in North Carolina, the Department of Commerce is responsible for WIA programs and the Department of Health & Human Services is responsible for all aging programs, including SCSEP. While responsibility for employment programs resting in different state departments does not prevent a fully integrated system, it does present additional challenges. The complexities of operating employment and training programs are better understood by considering the number of state agencies and service organizations that are involved in operating a OneStop. By way of example, Appendix B lists the required OneStop partners and state agencies or service providers operating each of the programs in North Carolina.

The structure of SCSEP program operations and administration also presents challenges to an efficient system of program delivery. SCSEP employment centers are operated by either national grantees, national subgrantees, states, or state subgrantees. There are currently 74 grantees, of which 18 are national grantees and the remaining 56 are units of state and territorial governments. States typically sub-grant program administration to the Area Agencies on Aging or community-based organizations. National grantees are allocated about 78% of SCSEP funding; the states or territories as grantees receive the remaining funds. State SCSEP grantees are responsible for coordinating SCSEP services in their states for both national and state

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subgrantees, but they have no authority over the national grantees. While most states effectively coordinate activities, there have been issues of overlapping geographic areas and duplicate host agency relationships. For example, in Maricopa County (Phoenix) Arizona, three SCSEP national grantees and the state's subgrantee all provide services in that area.

**Role of AAAs**.  Several key informants reported that the Area Agencies on Aging (AAA) have a presence in some of the state's OneStops, either as a SCSEP state subgrantee or through a state block grant. Co-location of the AAA at a OneStop is an effective way for both WIA and SCSEP program participants to receive services available through the AAA. For example, a program participant might be responsible for the care of an aging parent, which can act as a barrier for finding new employment; the AAA could assist in finding an adult day care center or in providing home care services. The AAAs were generally viewed as playing an important role in the workforce system and they offered resources that were underutilized. Variability in the presence of AAAs at WIA OneStops presents challenges in creating a fully integrated workforces system; inclusion of AAAs as partners could enhance the availability of supportive systems to OneStop clients.

**Eligibility determination.**  Eligibility requirements vary by program as do mandated processes for verification of eligibility. Several key informants involved in both SCSEP and WIA programs reported that documentation for SCSEP eligibility was especially onerous and required extensive administrative time. In several states, key informants noted that WIA eligibility was quite easily confirmed through unemployment insurance records. All states collect individual level wage data, and the Wage Record Interchange System (WRIS) facilitates the exchange of wage data among participating states. SCSEPs administrative burden might be

reduced if alternative sources for income eligibility information could be identified, such as electronic databases.

**Importance of collaboration and cross-training.** Integrated service models require that OneStop staff be knowledgeable about multiple programs and resources. Several key informants reported that strong communication among OneStop partners was crucial to creating a seamless and effective system that can provide all available services to program participants. This can be accomplished through ongoing training and cross-training of OneStop staff. Webinars and conference calls were reported as techniques used by some key informants to meet staff training needs, as were monthly workshops.

**Role of the case manager/employment specialist**. "Case manager" is a common term utilized to describe the staff member that guides program participants through the reemployment process. Several key informants objected to the term "case manager" because of its connection with clinical services such as social work, which may send the wrong message to program participants. Alternative terms, such as employment specialist or career counselor, were used in some sites. The "Employment Specialist Model" is shown in Figure 4. This model illustrates the most important components for achieving long-term positive employment outcomes for older workers.

Figure 4. *Role of Case Manager/Employment Specialist in Workforce Development*
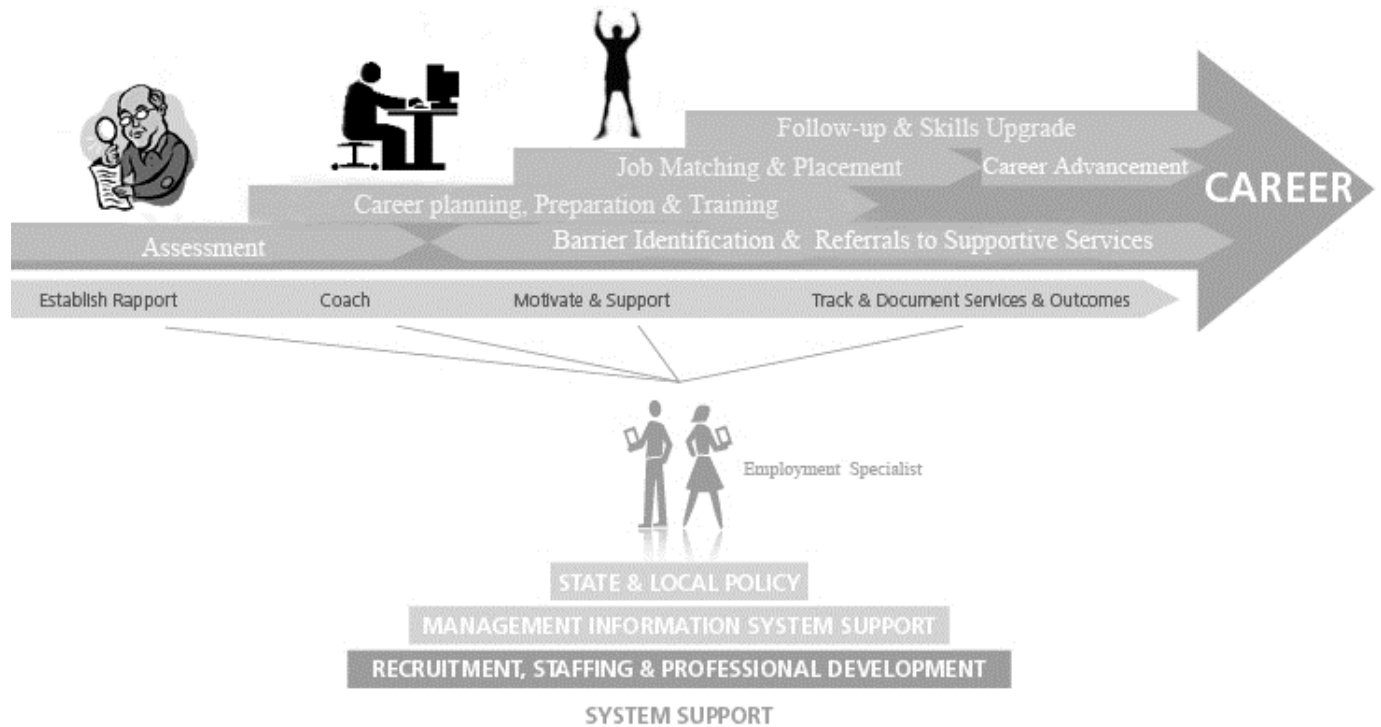


Adapted from Workforce[3] One (2011).


## SERVING OLDER WORKERS

The changing age structure in the U.S. has resulted in a greater number of displaced older

workers seeking the services of WIA programs. Older workers make up a larger proportion of

the workforce and as a result, a greater proportion of the unemployed than they did in prior

decades. Without exception, key informants noted special challenges faced by older displaced

workers. Many older workers were employed by a single employer for several decades and they

have no experience in preparing a resume or in job interviewing. Job loss at older ages can be an

especially traumatic occurrence, especially for older men who have been the primary

breadwinner for their family and have never relied on services from public assistance programs.

It is not uncommon for older workers to go through a grieving process following job loss or to

experience mental health problems, such as depression or anxiety disorders. For many older

workers, it has been several decades since they were in school and if basic skills, such as reading,

mathematics, and written communication, were not regularly used, they may be out of practice.

Lack of computer skills is also an issue for many older workers. And of course there is the issue

of ageist attitudes by potential employers. Availability of resources to address these and other

barriers faced by older workers is key to achieving positive program outcomes.

**Outreach.** Key informants identified many different avenues to make older workers

aware of services available at their OneStops. Word-of-mouth was the most common referral

source reported by both WIA and SCSEP key informants. In addition to word of mouth, SCSEP

officials reported using public service announcements, flyers at senior centers, AAAs,

advertisements on grocery receipts, and church bulletins to inform the public about their

services. Most older WIA program participants utilize the WIA Dislocated Worker program as

compared to the WIA Adult program (Public 2010Q1 WIASRD Data File; Social Policy

Research Associates, 2010). Dislocated workers are typically contacted by their local OneStop

upon announcement of a plant closing or mass layoff and they are provided information on

available employment and training services. In addition, when workers apply for unemployment

insurance they are provided information about OneStop services.

**Ageism.** Ageist attitudes by employers are perhaps the largest obstacle older workers

face. Several key informants reported implementing programs to educate employers about the

value of hiring older workers. Self-imposed ageist attitudes were discussed by several key

informants. Many older workers believe that their age will make reemployment impossible and

lack an understanding of the value their experience can bring to an organization. Building self

confidence through updating basic skills (reading, mathematics, written communication, etc.),

instruction on improving interviewing skills, and creating a resume that emphasizes relevant experience rather than age can help reduce self-imposed ageist barriers. "Use Age to Your Advantage" workshops have helped accomplish these goals; the workshop is described in Promising Practice No. 1.

***Developing older workers' self-confidence about the value of their experience***

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*Promising Practice No. 1*

**"Use Age to Your Advantage" Workshops**

Ageist attitudes in the workplace are a common occurrence. In addition to educating employers about the value of hiring older workers and dispelling myths, building the self-confidence of the older worker and reducing self-imposed ageist attitudes can have positive outcomes. "Use Age to Your Advantage" workshops are offered at OneStops in several states, including Massachusetts and Minnesota. Jobseekers are reminded of the valuable experience they can bring to an organization and they learn how to sell themselves. Past accomplishments with measurable outcomes can be put in the context of how this experience is transferable and will benefit the potential employer. These workshops also offer strategies for creating resumes that focus on relevant experience (rather than years of experience) and strengths, along with interviewing skills.

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**Dealing with health issues**. Chronic health conditions, substance abuse, and mental health issues pose additional barriers to some older unemployed workers. Most key informants reported making referrals for substance abuse and mental health services, but the availability of free services varies by state and by workforce area. Some OneStops have taken the initiative to develop successful partnerships with organizations that provide these services. For example, Clermont Recovery Center provides counseling for substance abuse and the Clermont Counseling Center provides mental health counseling services to clients of the OneStop in Clermont County, Ohio. Unless these barriers are addressed, the client is less likely to become employed or remain employed. Cincinnati Works, a workforce intermediary funded through private sources, estimates that 60% of their participants have chronic depression or anxiety. They

have a mental health professional and a part-time chaplain on their staff. In addition, employment counselors are trained to recognize the symptoms of depression and substance abuse and make appropriate referrals. Chronic health conditions that are not well controlled can also prevent older workers from becoming and remaining employed. California and North Carolina offer chronic disease self-management workshops for their SCSEP participants (please see Promising Practice No. 2). Expansion of this program into WIA OneStops could provide benefits for their program participants as well. Other important referrals available at most OneStops include those to services related to domestic abuse and homelessness, which were reported by several key informants as common concerns among their program participants because they were already dealing with, or at risk for, these problems.

*Chronic disease management is important for success in the workplace*

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*Promising Practice No. 2*

### Chronic Disease Self-Management Program

Many older adults have chronic conditions that act as barriers to both finding employment and staying employed. Several states, including California and North Carolina, have implemented evidence-based chronic disease and diabetes management programs for their SCSEP participants. These programs are not designed to help people learn more about their chronic conditions, but rather learn the skills and tools to better manage their chronic conditions. The chronic disease self-management program consists of 2 ½ hour sessions held weekly over a 6-week period. Participants learn skills that are applicable to a career search and future employment, such as techniques to deal with pain and fatigue and appropriate management of medications. Potential partners to implement similar programs include physician groups, community health clinics, public health departments, and aging network organizations (e.g. AAAs).

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**Adult Basic Education**.  Many unemployed older adults have been out of school for several decades and their reading, mathematics, and written communication skills may need to be enhanced. Their computer skills may also be lacking. Computer skills are not only a requirement for most jobs, they are also necessary for networking and searching for available

positions. Most key informants (both WIA and SCSEP) reported offering workshops on networking (e.g. through Facebook or LinkedIn) and online job searches. These basic skills are a prerequisite for most jobs currently in demand. Adult Basic Education (ABE) is funded through WIA Title II; those providing ABE services are a required partner under the Workforce Investment Act. While SCSEP program participants are generally eligible for ABE, lack of a fully integrated workforce system can result in obstacles in obtaining these services. When questioned about the availability of WIA Title II funds for SCSEP program participants, some key informants reported that SCSEP funds were used for that purpose rather than WIA Title II.

      **Prospects for reemployment**.  Research has suggested that older workers are more likely to be hired in certain occupations over others (Hirsch, Macpherson, & Hardy, 2000; Hutchens, 1988, 1993). When key informants were asked if age differences in employment opportunities in certain occupations was a consideration in training decisions, most reported that it was not. There were a few exceptions; one key informant suggested that older workers were more likely to be hired in service occupations where "empathy is more important than transactions." Another reported that the green jobs initiative (available from ARRA funds) had been especially successful for older workers; unemployed or underemployed trades people (e.g. plumbers, carpenters, etc.) were retrained in green construction and able to find new employment. Appendix C provides information about occupational training received as compared to occupation in reemployment for male and female participants in WIA programs. In some cases there is a mismatch between training and occupation; men participating in the WIA Dislocated Worker program tend to receive training for managerial and technical positions but be hired in the trades or for service positions. As with any age group, decisions on occupational training for older workers should consider where they would most likely find new employment.

Cincinnati Works (CW) considers the three most important outcomes for their members to be going to work, staying at work, and earning a living wage. CW, which refers to their program participants as "members," provides extensive follow-up services to ensure their members remain employed. Post-employment follow-up services play an important role in long-term positive outcomes. As several key informants noted, barriers older workers faced prior to becoming reemployed will not automatically disappear; continued supportive services may be required. Because public resources may not be as readily available after the participant achieves reemployment, partnerships with non-profits and other organizations continue to be important. Earning a living wage may not be achieved immediately upon reemployment and additional training may be required to advance up the career ladder.

**Improving outcomes.**  Much has been written about WIA performance standards providing disincentives to OneStop operators to provide services to workers that are the most challenging to place in new employment, which would include most older workers (O'Leary, Straits, & Wandner, 2004; Shaw & Rab, 2003; Social Policy Research Associates, 2004). Workforce intermediaries and SCSEP project directors described several strategies they use to improve the likelihood of older program participants receiving intensive or training services through a WIA OneStop. For example, improving basic skills (reading, mathematics, written communication), providing referrals to improve physical appearance (e.g., clothing and dental), and addressing other barriers such as depression can improve not only the chances for reemployment, but also the likelihood of receiving more intensive WIA services.

When asked if older workers are a more challenging population to serve than younger workers, one WIA key informant, who was herself an older worker, shrugged her shoulders and said "this is who we are, this is who we serve." Nearly all WIA OneStop key informants

understand that changing demographics and current economic conditions will result in an increased number of older clients facing multiple barriers in seeking new employment.

**TRAINING MODELS**

SCSEP serves workers aged 55 and older who are not considered to be "job ready." In order to become job ready, they may need basic education (reading, mathematics, and written communication) in addition to skills training. Providers of adult basic education (ABE) and literacy services are required partners at WIA OneStops. WIA key informants reported that ABE services were provided to older clients who lacked those skills. Nearly all key informants reported a shortage of funds to establish ITAs for those who could benefit from more intensive training services; increased funding for ITAs would benefit all age groups. ARRA provided additional funding, but that program has ended, resulting in unmet needs by program participants. Recently, there has been an increased focus on shorter term training that would result in a credential or certification to qualify the participant for jobs currently in demand. This will allow more individuals to benefit from limited training funds and may be especially attractive to older workers who may not want to spend an extended period in training. One key informant described a multi-year stakeholder process in which industry partners worked with the local WIB to develop, and even provide site-based instruction for, certifications that would be valuable and recognized by local employers. Examples include Basic Machine Maintenance and Quickbooks, which each take 40 hours to complete, Forklift Operation, which takes 5 hours to complete, and Blueprint Reading I and II, which each take 20 hours to complete. In addition, community colleges play an important role in workforce development in the United States and have been a source of lifelong learning for older adults for some time. More recently, community

colleges have begun to focus on encore careers for older workers (Collier, 2011; Council for Adult and Educational Learning, 2008).

**Baseline skills assessment.** SCSEP and WIA key informants reported their participants are required to complete a skills assessment which provides a framework for the services and training they will be provided. For older workers, identification of transferrable skills is especially important. Training for green jobs provides an example of transferable skills; a construction worker knowledgeable about traditional methods is able to transfer many of those skills to "green construction." Older workers tend to underestimate their transferrable skills; employment counselors play an important role in guiding older workers on methods to leverage their existing skills through additional training to become more employable. Many older workers have been unemployed for an extended period and without upgrading their skills, new employment at a living wage is unlikely. Most key informants require their participants to take a job search skills course prior to interviewing for a job. On-line job searches and applications are the rule rather than the exception and many older workers have no experience in these areas. A SCSEP key informant reported that following implementation of their job search skills course, job placements increased from 32% to 54%. One key informant noted that on-line applications, which are the norm today, have a screening mechanism that eliminates job applicants with an unusual job history or that is not completed in such a way to make it through the screening process. Knowledge of how to fill out an on-line application to make it through the screening process is crucial.

**Measuring outcomes**. While all key informants reported that training funds were used to qualify participants for jobs in demand, only a few key informants analyzed the outcomes to identify net impacts. Washington has completed several net impact evaluations since WIA

programs were implemented and used the results of those evaluations to structure their programs

to improve effectiveness. Their I-BEST program described in Promising Practice No. 3 provides

an example of how their research was used to improve program outcomes. WIA performance

data only tracks reemployment income for 4 quarters whereas the state of Washington uses 10

quarters in their net impact analysis; their view is that longer term outcomes are an important

indicator of program benefits. One key informant expressed frustration with the lack of the

availability of current and complete performance data to help inform decision making on the

most effective training programs. Availability of information on program outcomes at a local

level could allow decision makers to make better use of limited training funds.

*Improving outcomes by combining adult basic education and skills training*

*Promising Practice No. 3*

**Integrating Adult Basic Education (ABE) with Skills Training:  I-BEST**

Older unemployed workers often lack basic reading, writing, and mathematical skills required for new employment and may need adult basic education (ABE). For many older workers it has been several decades since they were in school and unless these basic skills have been used regularly, they may be lacking. Researchers for the state of Washington found that those who received both adult basic education and job skills training had better long-term outcomes in terms of employment, hourly wages, and hours worked than those who received only ABE. As a result of this research, Washington has implemented a program that integrates basis education with skills training; the program is called I-BEST. While Washington's study did not focus on older workers, the lessons learned may be applicable to older workers. In addition to programs that enhance reading, writing, and mathematical skills, older workers may have better outcomes if this is done in combination with skills training.

**Job search workshops**.  Most WIA key informants said they offer multiple workshops to

assist program participants in their job search. Only one WIA key informant reported offering

workshops specific to older workers; the workshops are offered by the AAA and funded through

a block grant. This program focuses on unique aspects that older workers face in the job search

process and identifies resources. WIA key informants generally thought that intergenerational

classes were more effective; older workers do not want to be segregated and each group benefits from the other. Several noted that lack of computer skills was not necessarily a function of age, but a function of attitude ("I can't learn how to use a computer") or having a job for many years that did not require computer use. For example, one person suggested that an individual who worked for the same employer for 20 years and was now age 40, faced many of the same barriers as a 60 year old in learning computer or other new skills.

**Job readiness.**  Several key informants reported that career readiness certificates were offered in their states. The certificates are intended to convey to potential employers that the jobseeker has basic skills; Pennsylvania's WorkKeys® Career Readiness Certificate is described in Promising Practice No. 4.

*Career readiness certificate demonstrates basic levels of job preparedness*

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*Promising Practice No. 4*

### WorkKeys® Career Readiness Certificate

Several of Pennsylvania's Workforce Investment Boards offer the WorkKeys® Career Readiness Certificate (CRC) at their CareerLinks (Pennsylvania's OneStops). CRC is a system developed by American College Testing (ACT) that helps individuals, companies, and organizations identify, assess and learn the skills needed to fill jobs. The CRC is a portable career credential that assures employers that job applicants have basic levels of preparedness, including foundation skills in math, reading, finding information, and communicating, and soft skills, such as attendance, relational skills, problem-solving and decision making. CareerLinks offer a variety of services to help jobseekers prepare for the certification. This service is offered to jobseekers regardless of age or prior work experience.

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Prior to expending both time and money for occupation-specific training, it is important that the program participant be well informed about the occupation. Not only should the occupation be one in demand, it should be one that is a good "fit" for the program participant. In order to address this issue, Pennsylvania's Central WIB implemented the "Fit-For" program, described in Promising Practice No. 5.

*Providing program participants a better understanding of specific occupational job demands*

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*Promising Practice No. 5*

**"Fit-For" Program**

Unemployed workers often aspire to become employed in a specific industry without a basic understanding of that industry. Pennsylvania's Central WIB implemented a "Fit-For" program so that a participant could have a better understanding of an industry prior to making the time and financial commitment to training and the job search process. For example, a program participant might aspire to become a licensed practical nurse, but not have a clear understanding of what the occupation involves, such as the types of jobs that would be available or the nontraditional hours. The participant is provided with a short-term training program to provide detailed information about the industry of interest. Both employees and employers benefit from this program; employees are better able to make informed career decisions and employers have lower turnover rates because employees are more likely to be a good "fit."

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**On-the-job training**.  Both WIA and SCSEP key informants reported an increased focus in on-the-job training. Leveraging resources through both the program and employer contributing to the participant's wages allows more people to be served and also demonstrates a commitment on the part of the employer; as one key informant stated, "they have some skin in the game." Some employers, especially small employers, may prefer to use temporary employees. Ohio addressed this issue by obtaining a waiver from the DOL and now offers a sliding scale so that small businesses pay a smaller proportion of participant wages than do larger businesses. This program is more fully described in Promising Practice No. 6.

*Using waivers to make on-the-job training more attractive for employers*

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*Promising Practice No. 6*

**On-the-Job Training**

Both WIA and the OAA provide for either on-the-job training (OJT) or on-the-job experience (OJE). Employee wages are shared between the employment program (i.e. SCSEP or the WIA OneStop) and the employer with the expectation that after some specified period, and assuming satisfactory work, the employee would be hired. Several key informants reported that these programs are underutilized, often because employers prefer to hire temporary workers. The WIA statutory employer match requirement is 50%, but waivers for different matching levels have been obtained by several states. For example, Ohio obtained a waiver from the U.S. Department of Labor to change the 50% required employer match to a minimum of 10%. A sliding scale based on employer size was implemented so that employers with 50 or less employees were only required to match 10% of wages and employers with 100 or more employees matched 50% of wages. The result was a doubling of participation in the OJT program between 2008 and 2009.

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**Strategic volunteering.** Although not an optimal solution, several key informants recommended that their participants gain additional experience through strategic volunteerism, which might also be called an unpaid internship. If properly structured, a volunteer position can lead to paid employment. The ideal strategic volunteering opportunity will increase the participant's skills, strengthen their work-readiness, and help demonstrate the participant's fitness for a particular kind of job and job setting. Recognizing that some SCSEP program participants may be unable to become employed in unsubsidized work, the 2010 SCSEP Final Rule provides a performance measure for volunteering as a positive outcome (U.S. Department of Labor – Employment and Training Administration, 2010). Strategies for strategic volunteering are described in Promising Practice No. 7.

*Volunteering to gain experience*

**Role of community colleges**.  For many decades, community colleges have played an important role in workforce development. More recently, they are providing older workers with education and training for encore careers. The Atlantic Philanthropies partnered with the American Association of Community Colleges for the "Plus 50 Initiative." This program is intended to build the capacities of community colleges nationwide to develop academic programs that would engage learners aged 50 and above. Since the beginning of this initiative in 2008, about 15,000 plus-50 individuals enrolled in courses associated with the program and 73% of plus-50 students agree that their workforce training program has helped them to get hired into a job. In addition, 96% of plus-50 volunteers felt more connected to their community as a result of volunteerism (LFA Group, 2010, p. 3).

Educational activities focus on training and retraining programs along with volunteer, civic, and service activities. Thirteen colleges received three-year pilot grants to create or enhance programs and five mentor colleges that had long established programs for plus 50 learners also received grants. While course content did not generally change, the programs focused on the specific needs of older students in other ways, including flexible class schedules, accelerated training, and distance learning classes. Students are provided with counseling support

to match student interests with occupations in demand. Advisors are trained to understand the unique aspects of the older learner. Introductory computer classes are available and are structured to meet varying learning styles. Dual monitors, speakers, and other adaptive devices are often available and result in better learning outcomes for older learners and may benefit younger learners as well. Students are offered advice on available financial aid and some colleges have WIA OneStops on-site (American Association of Community Colleges, 2008). Key informants from four Plus-50 programs were interviewed; Northeast Wisconsin Technical College's Plus-50 program is described in Promising Practice No. 8. Plus-50 program administrators uniformly reported that their classes are intergenerational; they felt that both age groups benefited from this arrangement. Older students tend to prefer face-to-face classes over on-line classes, but face-to-face classes tend to have a large on-line component.

Community colleges are well positioned to meet the needs of older students who desire shorter term training options to obtain a certificate or credential. For example, Northeast Wisconsin Technical College offers Library Assistant and Customer Service certifications which can be completed in one semester. Medical Coding, Renewable Energy Solar, and Web Design certificates can usually be completed in a year.

*Community colleges play an important role in educating older students for encore careers*

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*Promising Practice No. 8*

**Plus- 50:  Northeast Wisconsin Technical College (NWTC)**

NWTC is a "Plus-50 Initiative" grant recipient, which allowed them to market their community college to older students and adjust their curriculum to better serve that age group. Marketing efforts have included open houses that featured panel discussions with older students. Current and former Plus-50 students play an important role in encouraging other older students to return to school. While the courses themselves were not changed, the number of introductory computer classes was increased and additional face-to-face courses were added to the schedule. Most students in the program are seeking education for encore careers; they are often dislocated workers seeking certificates, and in many cases desire less physically challenging work. A career center counselor is available to provide guidance on appropriate academic programs and courses. Classes are "intergenerational" and include both traditional and Plus-50 students; both age groups benefit from being in the same classroom. The local WIB has an office on campus that is staffed two days per week. ITA funds through WIA are sometimes available for tuition.

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Training resulting in positive long-term outcomes for program participants is an important goal of all workforce programs. Multiple strategies and promising practices have been identified that should help accomplish this.

**LEVERAGING RESOURCES**

Leveraging resources, whether through coordinating services with required partners or from other sources is key to the success of most OneStop operators. Many examples of leveraging resources were identified including donations of computers and software, fundraisers, funding from grants to continue old or implement new programs, and using volunteers to perform key functions (e.g., retired educators and human resource executives). Over the past several years, both Microsoft and IBM have donated software and computers for workforce training. Operation A.B.L.E. of Greater Boston has successfully leveraged resources from both public and private sources, including IBM. Microsoft's Elevate America Program and Operation

A.B.L.E. of Greater Boston's activities are more fully described in Promising Practices Nos. 9

and 10.

***Leveraging resources from public and private sources provides more training opportunities***

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*Promising Practice No. 9*

**Operation A.B.L.E. of Greater Boston**

The mission of Operation A.B.L.E is to "provide employment and training opportunities to mature workers aged 45 and older from economically, racially, and occupationally diverse backgrounds. A.B.L.E. is equally committed to service Massachusetts employers by providing well-qualified candidates to meet their employment needs and by training employees so they can be as productive as possible at their jobs." Operation A.B.L.E. has operated as a non-profit for nearly 30 years and has served over 30,000 mature workers, providing counseling, access to job listings, occupational skills training, and computer skills training. Operation A.B.L.E. recognized the importance of training older workers on computer software to make them more employable and became the first organization in the country to have an IBM-funded computer training center for older adults. Operation A.B.L.E. also operates as a SCSEP subgrantee for the Commonwealth of Massachusetts and it's Executive Director, Joan Cirillo, serves on Massachusetts Workforce Investment Board along with its Executive Committee. Access to both public and private resources has allowed Operation A.B.L.E. to offer additional services to its clients.

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WIBs have effectively leveraged resources by including non-required partners in their

MOUs. Key informants provided several examples, including legal services, and counseling for

mental health and substance abuse. AAAs can play an important role in leveraging resources for

older workers. This might be accomplished through stronger relationships between the AAAs

and local WIBs and SCSEP operators. One key informant expressed the thought that the AAA

should be included on the local workforce board or as a non-required partner. In some cases, it

may be more effective to form partnerships to leverage resources, as has been done by several

WIBs. This is more fully described in the next section.

*Promising Practice No. 10*

**Microsoft's Elevate America Program**

In early 2009, Microsoft launched a program in partnership with states and local agencies across the country to provide training vouchers for participation in e-learning programs. These vouchers were available at WIA OneStops throughout the United States. The computer training helped about 2 million people gain technology skills that resulted in certifications needed to find employment. While this program is now over, it provides an example of leveraging donated resources.

**PARTNERSHIPS AND COLLABORATIONS**

Partnerships and collaborations were the rule rather than the exception for the successful WIBs and intermediaries that were interviewed. Many of these partnerships were long-standing, which was important to seeking additional funding opportunities. In several cases, these relationships made it possible to obtain funding through grants that would not have otherwise been possible. Formation of the Oh-Penn region, described in Promising Practice No. 11, is a case in point.

*Collaboration between WIBs increases funding opportunities*

*Promising Practice No. 11*

**Ohio-Pennsylvania Interstate Region:  A Joint Strategy for Regional Development**

The "Oh-Penn" region, the nation's first designated interstate region, encompasses three workforce areas in Eastern Ohio and Western Pennsylvania that are part of a single metropolitan statistical area with similar demographics and a shared employer base. Commuting patterns allow for a common labor market. Recognizing their interconnectedness, the three WIBs established a governing competitiveness council that created a vision for the region. The three WIBs shared the best of what each offered, including Pennsylvania's WorkKeys® Career Readiness Certificate. This partnership has resulted in a $250,000 innovation grant from the U.S. Department of Labor and a $550,000 grant from Walmart's America Works. Collaboration on funding opportunities has allowed each WIB in Oh-Penn to operate more efficiently and better address the needs of program participants. The Oh-Penn region has served as an example to others and additional interstate regions are expected to be established in the near future.

While some key informants reported partnering with other WIBs, they also reported partnering with employers, such as hospitals, to obtain grants for health care training. Well established relationships with employers can lead to opportunities for further collaboration. Many key informants commented on the important role libraries play for their program participants, especially in rural areas where OneStops may not be conveniently located. The Anoka County (Minnesota) Job Training Center formed a partnership with the library in their county. Not only did both parties benefit by sharing resources, the library successfully obtained a grant to further expand the relationship. This is more fully described in Promising Practice No. 12. If a grant is not available from typical workforce sources, the partner may have sources that could be pursued.

***Libraries are important workforce partners and increase access to program services***

*Promising Practice No. 12*

**Library Partnerships**

Many low-income older adults can't afford to buy a computer or pay for high-speed internet. Knowledge of computer use is a prerequisite for nearly all jobs. In addition, social networking and on-line job searchers are a large part of today's reemployment process. Recognizing the importance of libraries to job seekers, the Anoka County (Minnesota) library system and the Anoka County Job Training Center (the local WIB) combined forces so they could both better meet the needs of their clients. The Job Training Center designated an official liaison to the county library system. The liaison trained library staff to use OneStop resources and the library staff educated OneStop staff about the library system's resources. The goal is to create an interface between the OneStop and library computer systems so that library patrons can access information only available at the OneStop, such as job search and career research resources. Anoka County has a single OneStop but there are eight county libraries; this partnership has allowed the WIB to effectively leverage resources. This relationship has been formalized by adding the Anoka County library as a partner organization in their memorandum of understanding. The Anoka County library recently received a Library Services and Technology Act Federal Grant to support an initiative with the OneStop, Adult Basic Education, and a local library site.

WIA's required partner structure provides many opportunities for these organizations to join forces for multiple purposes. Community colleges often serve as required partners for WIA OneStops; they generally have academic or career counselors that can supplement those available at the OneStop. Writing grant proposals is another example of the importance of collaboration with partners. Most key informants found it difficult to allocate time to write grant proposals, but understood the importance of obtaining grant funds to leverage resources. Strong relationships with partners made it possible for several key informants to submit grant proposals and obtain funding that would have otherwise been impossible. For example, no federally funded SCSEP staff time can be devoted to grant-writing; but partnering with non-profit organizations with multiple funding streams would allow the SCSEP agency to participate in discussions about program ideas, and to collaborate on a new project if new funding is secured.

**EMPLOYER RELATIONSHIPS**

Workforce Investment Boards, both at a state and local level, are structured to recognize the important role employers play. Employers play a prominent role in WIB activities and decision making. WIA key informants uniformly stated that they have two clients: employers and employees. Strong relationships with employers and maintaining a track record of referring strong job candidates is an approach several key informants use.

Successful state and local WIBs and OneStop operators spend considerable resources in developing employer relationships. One local WIB representative reported that 15-20% of employers in the area rely on the WIB for employment services. This was accomplished through a sector or cluster strategy; similar industries were clustered and a partnership was formed between the WIB and the cluster. This structure made it easier to identify specific skills required

by the cluster and guided the expenditure of training funds. Strong employer relationships can also play an important role in implementing a successful on-the-job training program.

Developing relationships with SCSEP host agencies and potential employers for older workers can be a challenging process. Employers must not only understand the benefits of hiring older workers but they must also have potential employment opportunities. The Pima Council on Aging, which is the state SCSEP subgrantee in Tucson, Arizona, has addressed this by awarding an "Age Friendly Employer Certification" to employers who have demonstrated an understanding of the value older workers bring to their organization (see Promising Practice No. 13).

Other SCSEP key informants reported having employer panels or senior job expos. For example, members of an employer panel would each describe their company and the types of positions they have available. Without additional funding from other sources, SCSEP programs do not generally have the resources to develop a large cadre of potential employers. Their focus is primarily on developing relationships with host agencies, which in current economic conditions as a public or non-profit entity may not be in a position to offer paid employment. In order to provide on-the-job experience opportunities, it will be necessary for SCSEP operators to increase their focus on developing employer relationships. As is noted in the Pima Council on Aging example, this AAA formed a separate non-profit company, Mature Worker Connection, to develop employer relationships. Leveraging resources or forming partnerships is a viable alternative to allow an increased focus on employer relationships.

*Leveraging resources for increased focus on employer relationships*

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*Promising Practice No. 13*

### Pima Council on Aging

The Pima Council on Aging, the Area Agency on Aging (AAA) in Pima County (Tucson) Arizona, is a SCSEP state subgrantee. They also operate the Mature Worker Connection (MWC), which is a non-profit referral and job placement service for Pima County serving residents aged 50 and older and employers in the area. These services are provided at no cost to both employers and employees. MWC and SCSEP provide complimentary services; program participants benefit from the services offered by both organizations. MWCs mission is to make employers aware of the value of mature workers and awards an "Age Friendly Employer Certification" to employers in the Tucson area who have demonstrated their willingness to hire older workers. Partnerships with other organizations, including the WIA OneStop, the Pima County library system, and community colleges, have been key to the success of MWC. The Pima Council of Aging operating as an AAA is able to provide additional support services, such as referrals to mental health specialists or help in dealing with an aging parent, to its SCSEP and MWC clients. The AAA also has representatives at the WIA OneStop to inform WIA clients about services available from SCSEP, MWC, and the AAA.

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Workforce intermediaries are known for their focus on employer relationships. Operation A.B.L.E. of Greater Boston and Cincinnati Works both rely on employer advisory committees. This is more fully described below in Promising Practice No. 14.

*Using employers to guide workforce development strategies*

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*Promising Practice No. 14*

### Employer Advisory Committees

Operation A.B.L.E. of Greater Boston and Cincinnati Works both rely on an Employment Advisory Committee to guide their organizations. These committees provide advice on topics such as the hiring environment, job vacancies, skills required for various jobs and assist in job placements, mock interviews, classroom speakers, and company tours. Committee members act as advocates for program participants with other employers and assist in providing career ladder opportunities. They also provide support letters for obtaining both private and public grants.

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## CONCLUSION

The WIA Adult and the Dislocated Workers employment and training programs will continue to play an important role in meeting the needs of older workers, especially those who want to continue working at older ages. While progress has been made in more fully integrating the partners in the workforce system, its complex structure with multiple funding streams creates many challenges to achieving a seamless delivery of program services to older workers. Collaborations among workforce partners are key to avoiding gaps and minimizing overlaps in providing services to older workers. Strategic partnerships have become increasingly important to both service delivery and leveraging resources to obtain additional funding from both public and private sources.

Publicly sponsored employment and training services will continue to play an important role in meeting the need of older workers, but limited resources will create additional challenges in providing those services. Identification of strategies that produce the best outcomes, along with collaborations and partnerships to leverage both public and private resources will be crucial to meeting the employment and training needs of an aging population. The examples presented in this report provide opportunities to do so. By 2019, the entire baby boomer cohort will have reached age 55. The workforce system should have programs in place to meet the needs of this influential cohort.

**APPENDIX**

Appendix A. *Summary of Eligibility Requirements for WIA Adult and Dislocated Worker Program*

| | SCSEP | WIA Adult Worker | WIA Dislocated Worker |
|---|---|---|---|
| Age | 55 and older | 18 and older | 18 and older |
| Income | Family income can't be greater than 125% of federal poverty income guidelines. Examples of income sources that are included are earnings, unemployment compensation, Social Security, Social Security Disability Insurance, Veterans' payments, survivor benefits, pension and retirement income, interest, and dividends. | There is no income requirement for self-service core services. Priority for intensive and training services must be given to recipients of public assistance and other low-income groups when funds are limited. Low income is defined as the higher of poverty level for the household or 70% of the lower living standard income; all income sources included in determining income. | No specific requirement |
| Employment Status | Must be unemployed | Must be unemployed or underemployed | Must have received a termination notice or have been terminated or laid off; also includes displaced homemakers and self-employed who become unemployed due to economic conditions |

*Sources:* ETA, (2008); Workforce Investment Act of 1998.

Appendix B. *Required OneStop Partners and Agency Providing Services – North Carolina Example*

**Workforce Investment Act**
**Required One-Stop Partners and Responsibilities**

| Required Programs and Services | Agencies Operating Program or Providing Service |
|---|---|
| Programs under WIA Title I | |
|     Adults | Local WIA Service Providers |
|     Dislocated Workers | Division of Employment and Training<br>Workforce Development Boards<br>JobLink Career Center – WIA service providers |
|     Youth | Division of Employment and Training<br>Workforce Development Boards<br>JobLink Career Center – WIA service providers |
|     Job Corps[*] | Job Corps Outreach Service Provider<br>Job Corps Center Operators<br>Job Corps Placement Service Providers |
|     Native American Programs[*] | Commission on Indian Affairs<br>Local Tribes |
|     Migrant and Seasonal Farmworker Programs[*] | Telamon Corporation |
|     Veterans' Workforce Programs[*] | Employment Security Commission |
| Adult Education and Literacy Activities – WIA Title II | State Community College System<br>Local Community Colleges<br>Local Literacy Councils |
| Programs Authorized Under Parts A and B of the Vocational Rehabilitation Act | Division of Vocational Rehabilitation<br>Division of Services for the Blind |
| Wagner-Peyser Act Programs | Employment Security Commission |
| Welfare-to-Work Programs[*] | N/A |
| Title V of the Older Americans Act – SCSEP[*] | NC Division on Aging<br>Area Agencies on Aging<br>National SCSEP Grantees |
| Carl D. Perkins Vocational and Applied Technology Education Act – Postsecondary vocational education activities | State Community College System<br>Local Community Colleges |
| Trade Adjustment Act Programs (TAA and ATAA) | Employment Security Commission |
| Community Service Block Grant Employment and Training Services[*] | Office of Economic Opportunity<br>Local Contractors |
| Housing and Urban Development Employment and Training Activities[*] | Local Housing Authorities |
| State Unemployment Compensation Programs | Employment Security Commission |

[*]Indicates programs that may not be available in all areas of North Carolina

*Source:* North Carolina Memorandum of Understanding

Appendix C. *Adult Worker Occupational Categories of Training and Jobs for Men and Women Aged 55 and Over (April 30, 2008 – September 30 -2010)*

| | Men – ITA Established | | Women – ITA Established | |
|---|---|---|---|---|
| | Occupational Category of Job (percent) | Occupational Category of Job (percent) | Occupational Category of Training (percent) | Occupational Category of Job (percent) |
| Managerial, administrative, professional, or technical | 34.2% | 14.7% | 40.7% | 24.1% |
| Sales, clerical, and administrative support | 5.7% | 7.7% | 24.9% | 27.8% |
| Service Workers | 6.8% | 11.2% | 29.4% | 37.9% |
| Agricultural, forestry, fishing and related workers, construction and extraction workers | 5.0% | 3.5% | 0.3% | 0.2% |
| Mechanics, installers, repairers, precision-workers, machine setters, set-up operators, operators, tenders, assemblers, hand workers, transportation and related workers, and military | 48.3% | 62.9% | 4.7% | 10.0% |

*Source:* Public 2010Q1 WIASRD Data File

Appendix C (continued).  *Dislocated Worker Occupational Categories of Training and Jobs for Men and Women Aged 55 and Over (April 30, 2008 – September 30 -2010)*

|  | Men – ITA Established | | Women – ITA Established | |
| --- | --- | --- | --- | --- |
|  | Occupational Category of Job (percent) | Occupational Category of Job (percent) | Occupational Category of Training (percent) | Occupational Category of Job (percent) |
| Managerial, administrative, professional, or technical | 42.6% | 22.3% | 39.9% | 25.7% |
| Sales, clerical, and administrative support | 7.3% | 10.6% | 35.2% | 42.8% |
| Service Workers | 4.8% | 10.0% | 21.8% | 22.6% |
| Agricultural, forestry, fishing and related workers, construction and extraction workers | 4.5% | 3.5% | 0.4% | 0.10% |
| Mechanics, installers, repairers, precision-workers, machine setters, set-up operators, operators, tenders, assemblers, hand workers, transportation and related workers, and military | 40.8% | 53.6% | 2.7% | 8.8% |

*Source:*  Public 2010Q1 WIASRD Data File

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