Map of Target Area
WtW Initial Impact Study
THE IMPACT OF WELFARE REFORM ON THE DUDLEY STREET NEIGHBORHOOD!

After realizing that human services agencies were being inundated with requests for more services, DSNI wanted to know:

"How have neighborhood families fared under welfare reform?"

"How has this affected our community?"

Come and listen to three very powerful studies on the impact of welfare reform and the response to these questions.

JOIN US ON MARCH 15TH, 1999, 1:30 P.M. AT THE DUDLEY BRANCH LIBRARY
65 WARREN ST., ROXBURY
A RECEPTION WILL FOLLOW


FOR MORE INFORMATION: CALL PAT RIDDICK AT (617) 442-9670
SURVEY OF HUMAN SERVICE AGENCIES

INTRODUCTORY STATEMENT

Hi, my name is ___________________________ and I am calling from the offices of the Dudley Street Neighborhood Initiative (DSNI). We are calling because many residents living in Dorchester and Roxbury are being affected by the new Federal and State welfare reform rules, but not much is known about what these effects are. During the month of July, members of the Dudley Street Neighborhood Initiative and their partner agencies are interviewing business owners, teachers, church leaders, child care workers, human service workers, health care workers, and housing developers/managers, and community residents in an effort to understand what the consequences of the new rules are on both families who are losing welfare cash assistance and on the community at large. I would appreciate having an opportunity to hear your opinions about this issue. The survey we have developed will take about 15 minutes to complete. Your responses will be summarized with those of the other community residents we interview, without revealing anyone’s name. Would you be willing to participate in this survey? Is this a convenient time for us to talk?

If person agrees to participate, complete the following:

Interviewee’s first and last initials________________________
Interviewee’s town of residence____________________________

Interviewer:__________________________
Type of interview: Face-to-Face_____ Phone_______
Language Interview conducted in: _____ English _____ Haitian/Creole
_____ Spanish _____ Other (specify ____________)
Date of interview:____________________
DSNI 1998 SURVEY ON LOCAL WELFARE REFORM IMPACTS
SURVEY OF HUMAN SERVICE AGENCIES

Interviewee/Title: ____________________________ Date of Interview: ____________
Name/Type of Agency: ____________________________ Interviewer: ____________________________
Address: ____________________________ Face-to-Face ___ or Phone ___

Knowledge of Massachusetts Welfare Reform
Due to the new federal and state welfare reform laws passed in 1995 and 1996, Massachusetts families getting cash assistance can receive this aid for a maximum of 24 months within any five year period. The first wave of families to reach this time limit in Massachusetts will lose cash aid on December 1, 1998. Other provisions of the law include preventing legal immigrants from receiving Food Stamps, and requiring 20 hours of work or unpaid community service for some parents.

1. To what degree do you think that you understand these new welfare rules?
   Not at all  Somewhat  Very well
   1  2  3

2. Do you think your clients and other human service providers in this community understand the new welfare rules?
   A majority do  Some do  None do  Don't Know
   A. Clients
   B. Other human service providers

3. In your opinion, do many of your clients receive welfare cash assistance or Food Stamps?
   Yes  No  Don't Know
   If yes, what share of your clients receive welfare cash assistance?
   1. ______ under one third  2. ______ about one half  3. ______ a majority  4. ______ Don't know
   If yes, what share of your clients receive Food Stamps?
   1. ______ under one third  2. ______ about one half  3. ______ a majority  4. ______ Don't know

Impacts of Massachusetts Welfare Reform On Your Agency and Clients
The following questions ask for your opinions about impacts on your agency and on your clients related to the new welfare reform laws.

4. Within the past 12 months, have you as a human service provider observed any of the following changes in agency operations?
   A. More requests for help in obtaining services/support
   B. Higher demands for help from families who live outside of Dorchester or Roxbury
   C. More requests that cannot be met with current resources
   D. More staff burnout or stress
   E. More families dropping out of programs to go to work
   F. Other: Please specify

5. To what extent is your agency worried, if at all, that loss of welfare cash assistance will jeopardize the economic and family stability of your clients?
   Very worried  Somewhat worried  Not at all worried
   1  2  3  4  5
   If somewhat to very worried, which groups of clients is your agency most worried about?
   (Mark all that apply)
   A. _____ families with young children
   B. _____ elders
   C. _____ immigrants
   D. _____ other: Please specify
6. Within the past 12 months, have you as a human service provider observed any of the following changes with your clients?
   A. More families are losing their housing and moving.   ___Yes ___No
   B. More clients are without adequate food.     ___Yes ___No
   C. More clients are in emotional distress   ___Yes ___No
   D. More clients who are welfare recipients are finding and keeping jobs that bring enough income to meet their families' basic needs   ___Yes ___No
   E. More clients who are welfare recipients are having trouble meeting both their work and parenting responsibilities.   ___Yes ___No
   F. Other: Please specify ___Yes ___No

Taking Action

The following questions ask for your opinions about what can be done to limit the negative effects that may result from community residents' loss of welfare cash assistance when they hit their time limits.

7. Has your agency taken any of the following actions to help clients who have lost cash aid or Food Stamps or are trying to meet work or community service requirements?
   A. Provided clients with food   ___Yes ___No
   B. Provided clients with money (for rent, trans, food, etc)   ___Yes ___No
   C. Advocacy (going w/clients to DTA, legal help, etc)   ___Yes ___No
   D. Provided community service placements   ___Yes ___No
   E. Referring clients to training/jobs   ___Yes ___No
   F. Other: Please specify   ___Yes ___No

8. What actions would you like to see the local community take to limit the potential negative impacts of the welfare reform laws on human service agencies and residents in the community?

9. If DSNI and their partner agencies were to sponsor any of the following community-wide activities, would you be interested in participating?
   A. A focus group with human service providers on these issues   ___Yes ___No
   B. An educational campaign informing residents and human service providers of the new welfare rules   ___Yes ___No
   C. An educational campaign informing the media and legislators of impacts of the welfare laws on the local community   ___Yes ___No
   D. Organizing residents in the community to take action   ___Yes ___No
   E. Running legal clinics in neighborhoods   ___Yes ___No
   F. Other: Please specify   ___Yes ___No

10. Is there anything else that you would like to tell me about the impacts of the new welfare reform laws on your agency, clients, or this local community?

Thank you very much for taking the time to answer these questions. Your insights are extremely important to DSNI members. You will receive a copy of the final report of this survey sometime in the fall, and will be contacted about the activities DSNI plans as a result of what we have learned from you and the others we are interviewing.
Outline: Welfare Reform Presentation

1. Introductions

2. Purpose of presentation is twofold:
   a. provide overview of welfare to work and answer questions
   b. Offer some ideas for how people can participate in doing something about the reform

3. Overview of Changes (*pass out welfare reform handout*)
   a. time-limited benefits
   b. family cap
   c. Work Program Requirements
   d. Teen Parents
   e. Child Care

4. Questions and Answers *DISCUSSION*

5. Stress the importance of the work requirement (*pass out job handout*)

6. Opportunities to get involved
   a. welfare reform task force
   b. advocacy network
   c. phone tree
   d. host gathering to spread information
   e. tell friends about these opportunities to take some action

7. Ask for feedback, ideas, etc.

8. Direct people to sign up sheets for various projects
### BOSTON'S DEMOGRAPHIC AND SOCIOECONOMIC DATA BY NEIGHBORHOOD

#### Socioeconomic Indicators:

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<th>Indicator</th>
<th>Boston</th>
<th>North Dorchester</th>
<th>North End</th>
<th>Roslindale</th>
<th>Roxbury</th>
<th>South Boston</th>
<th>South Dorchester</th>
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<td>2.5</td>
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<td>91.5</td>
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<td>-40.0</td>
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<td>Percent adults (25+) with HS+</td>
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<td>70.2</td>
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<td>-4.5</td>
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<td>Unemployment rate</td>
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<td>5.9</td>
<td>5.7</td>
<td>14.3</td>
<td>9.3</td>
<td>11.3</td>
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<td>6.1</td>
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<td>Neighborhood percent difference from Boston</td>
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<td>-28.9</td>
<td>-31.3</td>
<td>72.3</td>
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<td>36.1</td>
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<td>$25,549</td>
<td>$31,103</td>
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<td>-8.5</td>
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<td>Percent total population below poverty</td>
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<td>Percent elders below poverty</td>
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<td>-12.4</td>
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<td>-17.0</td>
<td>96.1</td>
<td>30.1</td>
<td>30.1</td>
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<td>Homeownership rate</td>
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<td>24.6</td>
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<td>42.1</td>
<td>20.8</td>
<td>79.6</td>
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<td>Neighborhood percent difference from Boston</td>
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<td>-20.4</td>
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<td>-49.2</td>
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<td>38.2</td>
<td>-32.7</td>
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<td>Percent overcrowded Household</td>
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<td>1.4</td>
<td>1.4</td>
<td>3.1</td>
<td>11.0</td>
<td>2.6</td>
<td>6.6</td>
<td>11.0</td>
<td>0.6</td>
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<tr>
<td>Neighborhood percent difference from Boston</td>
<td>-77.8</td>
<td>-77.8</td>
<td>-50.8</td>
<td>74.6</td>
<td>-58.7</td>
<td>4.8</td>
<td>74.6</td>
<td>67.8</td>
<td>87.3</td>
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**DATA SOURCE:** US Department of Commerce, Bureau of the Census 1990 Modified Age-Race-Sex file (for population data) and 1990 Summary Tape File 3-A (STF-3A) for socioeconomic data.

**DATA ANALYSIS:** Rates and percentages calculated by the Boston Public Health Commission, Office of Research, Health Statistics, and Data Systems.
BTVC/WtW Program Information
BOSTON TECHNOLOGY VENTURE CENTER introduces you to a new Welfare-to-Work Program!

Do you like working with your hands? Are you interested to learn about how products are made?

Over the next year and a half, employers at Boston Technology Venture Center (BTVC) will be hiring 100 participants from the Welfare-to-Work Program for the following jobs:

- Production & Light Assembly
- Machine Operator
- Order Processor
- Shipping & Receiving

Wages start at $8 per hour, or $16,640 per year, plus benefits. Custodial parents can access Earned Income Tax Credits which could increase wages to approximately $19,840 per year.

BTVC is located in the Boston Marine Industrial Park, South Boston, and is served by MBTA bus routes 3, 6 and 7 and by private shuttles from South Station. Free T/Bus passes are available.

Work close to home with:

- Current and former program participants,
- Trainers, Teachers, and Case Managers from Jewish Vocational Service (JVS) and a
- Variety of Employers,—

All at the same location!

Complete a 4-6 week (20-25 hours/week) Job Readiness Training for a guaranteed job,

Enter Employment, and

Receive Post-Employment Education, Training, and Support Services,—

ALL AT BTVC!

Recruitment Managers at Dorchester Bay Economic Development Corporation and South Boston Neighborhood Development Corporation are looking for participants. For more information, call Lourdes De Jesus now at (617) 825-4200 x203.
ATTACHMENT A

U.S. Department of Labor Welfare-to-Work Competitive Grant

ELIGIBILITY CRITERIA

AT LEAST 70% of Welfare-to-Work funds MUST be used to serve the following individuals:

1) Current Long-Term or Time-Limited TAFDC Recipients
   Individuals currently in receipt of TAFDC, AND has been in receipt of TAFDC for 30 months or longer (not necessarily consecutive), OR will become ineligible for TAFDC within 12 months due to time limits.

2) Exhaustees (former TAFDC recipients who have exhausted TAFDC due to time limits).

3) Noncustodial Parents (see NOTE)
   Noncustodial parents who are unemployed, underemployed, or have difficulty paying child support obligations, AND, at least one of the following applies, with preference to those who meet the criteria under A:
   A. The minor child OR the custodial parent of the minor child is currently in receipt of TAFDC, AND has been in receipt of TAFDC for 30 months or longer (not necessarily consecutive), OR will become ineligible for TAFDC within 12 months due to time limits.
   B. The minor child is eligible for, or is receiving, TAFDC.
   C. The minor child received TAFDC in the 12 month period preceding the date of the determination but no longer receives such benefits.
   D. The minor child is eligible for, or is receiving,
      * assistance under the Food Stamp Act of 1977, or
      * benefits under the Supplemental Security Income (SSI) Program under Title XVI of this Act, or
      * medical assistance under Title XIX of this Act, or
      * child health insurance under Title XXI of this Act.

NOT MORE THAN 30% of Welfare-to-Work funds MAY be used to serve the following individuals:

1) TAFDC Recipients With Characteristics Associated With Long-Term Welfare Dependence
   Recipients of TAFDC (who do not meet the long-term or time-limited criteria as described above) who have characteristics associated with long-term welfare dependence (such as school dropout, teen pregnancy, or poor work history).

2) Children Aging Out of Foster Care
   Children who are 18-24 years old AND, who were recipients of foster care maintenance payments, OR were in foster care under the responsibility of the State, before they turned 18 years old.

3) TAFDC Recipients With Significant Barriers to Self-Sufficiency
   Recipients of TAFDC determined to have significant barriers to self-sufficiency, pursuant to criteria established by the Boston Private Industry Council.

4) Custodial Parents With Incomes Below 100% of the Poverty Line
   (Regardless of whether they are, or have been, a TAFDC recipient.)

NOTE: Noncustodial parents must agree to enter a Personal Responsibility Contract, and domestic violence organizations and Child Support Enforcement must be consulted prior to the provision of services.
## BTVC Welfare-to-Work
Revised Schedule of Planned Enrollments, by Cycle
June 2000

<table>
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<tr>
<th>JRT &quot;Entrance&quot; Dates</th>
<th>Step 1 (4 wks)</th>
<th>Step 2 (6 mos)</th>
<th>Step 3</th>
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<tr>
<td></td>
<td>Participants in Job-Readiness Training</td>
<td>Participants in Subsidized Employment</td>
<td>Participants in Un-Subsidized Employment</td>
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<tr>
<td>Sep-00</td>
<td>5</td>
<td>4</td>
<td>4</td>
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<tr>
<td>Nov-00</td>
<td>3</td>
<td>2</td>
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<tr>
<td>Dec-00</td>
<td>7</td>
<td>6</td>
<td>5</td>
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<tr>
<td><strong>Sub-Total</strong></td>
<td><strong>15</strong></td>
<td><strong>12</strong></td>
<td><strong>11</strong></td>
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<tr>
<td>Feb-01</td>
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<td>8</td>
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<tr>
<td>Mar-01</td>
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<td>May-01</td>
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<td>Jun-01</td>
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<td>Aug-01</td>
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<td>Oct-01</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>120</strong></td>
<td><strong>109</strong></td>
<td><strong>100</strong></td>
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# PLANS FOR BTVC WELFARE-TO-WORK "NEW HIRES", BY COMPANY & MONTH/YEAR

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<tr>
<th>Project Months</th>
<th>Month/Yr</th>
<th>Oroni, Inc.</th>
<th>HR Ross</th>
<th>DeCopier Technologies</th>
<th>New Basics</th>
<th>Edge 3D</th>
<th>Combination of Interested Employers</th>
<th>Total WTW New Hires</th>
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<td>Apr-00</td>
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<tr>
<td>8</td>
<td>May-01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10 Production Trainees</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 Order Processors</td>
<td>4 Sub-Assemblers</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Jun-01</td>
<td></td>
<td></td>
<td></td>
<td>5 Production Trainees</td>
<td></td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>6</td>
<td>Jul-01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10 Assemblers</td>
<td>18</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2 Ship/Receiving</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Aug-01</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>4</td>
<td>Sep-01</td>
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<tr>
<td>3</td>
<td>Oct-01</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>2</td>
<td>Nov-01</td>
<td></td>
<td></td>
<td></td>
<td>17 Direct Labor Staff</td>
<td></td>
<td></td>
<td>17</td>
</tr>
<tr>
<td>1</td>
<td>Dec-01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Planned # of Jobs** | 17 | 10 | 34 | 10 | 23 | 15 | 109

**NOTE:** Pre-employment training begins approximately 4-6 weeks prior to employment start date.
### BTVC Employers as of 6/22/00

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Company/Product Description</th>
<th>Status</th>
<th>Welfare-to-Work</th>
<th>Total Planned # of WtW Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oroni Inc.</td>
<td>Production of Power Conversion Technology, including DC/DC converters and internal AC/DC switching power supplies.</td>
<td>Currently has production/assembly contract with Dallas company. Manufacturing done by Aldotech in Warwick, RI (for Year 1), anticipates manufacturing in Boston within 18 months. Move in August 00, ready to hire Assemblers October 00.</td>
<td>4 Assembly workers to start Oct 00</td>
<td>19</td>
</tr>
<tr>
<td>Engineering Devices, Inc. (Klatt Technology)</td>
<td>Renewable Energy Technology. Produces electric generator component for wind energy.</td>
<td>Year 1 - developing at least 50 &quot;pre-production&quot; prototypes for 3rd party evaluation. Year 2 - market and sub-contract @ 90% manufacturing (retain 10% manufacturing/production in house).</td>
<td>Production &amp; Assembly</td>
<td>7</td>
</tr>
<tr>
<td>KaZak Composites Incorporated (KCI)</td>
<td>Production of replacement composite utility poles.</td>
<td>Year 1 - design, installation and debugging of automated production line (capable of manufacturing @ 25,000 poles/yr). Year 2 - facility improvements, market development, and limited production runs for customer sampling. Year 3 - 3 shift production crews.</td>
<td>Production &amp; Assembly (late 2001)</td>
<td>2</td>
</tr>
<tr>
<td>H R Ross Industries Inc.</td>
<td>Electric Transit Bus &amp; MOV System Development</td>
<td>1) Has production contracts with MBTA and MassPort. 2) Planning on moving in August-September 00.</td>
<td>By Dec 00/Jan 01, hire 1-2 Apprentices</td>
<td>7</td>
</tr>
<tr>
<td>SatCon Technology Corporation</td>
<td>Fuel Cell Technology (generate electricity from units that rely only on hydrogen for fuel).</td>
<td>Currently negotiating moving fuel cell division Into Dry Dock. Could move in as soon as October.</td>
<td>Manufacturing jobs</td>
<td>25</td>
</tr>
<tr>
<td>ZFB Boston</td>
<td>Service provider for conservation and preservation of library and archival materials.</td>
<td>ZFB Germany has more than 100 customers in Germany and Europe (Royal Library of Netherlands, German National Library, City Library of Bern, Switzerland, etc.) Interested U.S. east coast institutions: Boston Public Library, Harvard University Library, Boston Athenaeum, New York Public Library, Library of Congress, Washington, etc. Meeting with Athenaeum July 17. Goal is approximately 30-50 total employees.</td>
<td>Apprenticeship Training Program @ 6 months away</td>
<td>15</td>
</tr>
</tbody>
</table>
**REVISED IMPLEMENTATION PLAN FOR EMPLOYMENT**

<table>
<thead>
<tr>
<th>PLANNED EMPLOYMENT</th>
<th>Teradyne/CDI</th>
<th>OEM</th>
<th>Atlantis</th>
<th>ZFB</th>
<th>New Basics</th>
<th>SatCon</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan-01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb-01</td>
<td>6-8</td>
<td></td>
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<td></td>
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<tr>
<td>Mar-01</td>
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</tr>
<tr>
<td>Apr-01</td>
<td></td>
<td>1-2</td>
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<td></td>
</tr>
<tr>
<td>May-01</td>
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<td></td>
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<td>5-8</td>
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<tr>
<td>Jun-01</td>
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</tr>
<tr>
<td>Jul-01</td>
<td>6-8</td>
<td></td>
<td>2-3</td>
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<tr>
<td>Aug-01</td>
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<td>Sep-01</td>
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<td>3-5</td>
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<tr>
<td>Oct-01</td>
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<td>2-3</td>
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<tr>
<td>Nov-01</td>
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<td>4-6</td>
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<tr>
<td>Dec-01</td>
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</tr>
<tr>
<td>Jan-02</td>
<td>8-10</td>
<td></td>
<td>2-3</td>
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<tr>
<td>Feb-02</td>
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<td>Mar-02</td>
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<tr>
<td>Apr-02</td>
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<td>2-3</td>
<td>2-4</td>
<td>3-6</td>
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<tr>
<td>May-02</td>
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<td>Jun-02</td>
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<tr>
<td>Jul-02</td>
<td>6-8</td>
<td></td>
<td>4-6</td>
<td>4-6</td>
<td>6-8</td>
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<tr>
<td>Aug-02</td>
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<td>4-6</td>
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<td>6-8</td>
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<tr>
<td>Sep-02</td>
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</tr>
<tr>
<td>Oct-02</td>
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<td>4-5</td>
<td>3-6</td>
<td>4-6</td>
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<tr>
<td>Nov-02</td>
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<tr>
<td>Dec-02</td>
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</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>30</td>
<td>4</td>
<td>20</td>
<td>15</td>
<td>15</td>
<td>11</td>
<td>29</td>
</tr>
<tr>
<td></td>
<td>26-34</td>
<td>3-5</td>
<td>16-24</td>
<td>11-20</td>
<td>12-18</td>
<td>9-13</td>
<td>120</td>
</tr>
</tbody>
</table>

**NOTES:**
- Heavy lines show employment quarters (or months planned for employment).
- JRT would begin *approximately* 4 weeks prior to the first highlighted employment month (of the "employment quarter").
- Recruitment/Assessment/Enrollment (and participant preparation) would occur 1-2 months prior to JRT.
**BTVC Welfare-to-Work**  
**DRAFT - REGISTRATION FORM**

### Registration Number

### Registration Date

**How Did They Learn of Program?** (circle all that apply, and specify when possible)

<table>
<thead>
<tr>
<th>CDC</th>
<th>DTA</th>
<th>Friend</th>
<th>Flyer/Poster</th>
<th>Mailing</th>
<th>Job Fair</th>
<th>Church</th>
<th>One Stop Career Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOR/CSE</td>
<td>DOC</td>
<td>DSS</td>
<td>MRC</td>
<td>DPH</td>
<td>WIC</td>
<td>FOR Families</td>
<td>Housing Authority/Development</td>
</tr>
</tbody>
</table>

Event (specify) Other (specify)

**First Name**  
**MI**  
**Last Name**  
**Social Security Number**

**Address**

**Mailing Address (if different)**

**City/Town**

**State**  
**Zip Code**  
**Telephone**

**Other Place of Contact (Friend/Relative)**

<table>
<thead>
<tr>
<th>City/Town</th>
<th>State</th>
<th>Zip Code</th>
<th>Telephone</th>
</tr>
</thead>
</table>

**Date of Birth**

<table>
<thead>
<tr>
<th>Age</th>
<th>Race/Ethnicity (circle):</th>
<th>Language(s) Spoken:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>White</td>
<td>Black</td>
</tr>
<tr>
<td>Male</td>
<td>Other (specify)</td>
<td>English: Yes No Limited</td>
</tr>
</tbody>
</table>

**FAMILY STATUS**

<table>
<thead>
<tr>
<th>Single Parent</th>
<th>Parent 2-Parent Family</th>
<th>Family Member (under 22)</th>
<th>Teen Parent</th>
<th>Noncustodial Parent</th>
<th>Single Individual</th>
</tr>
</thead>
</table>

Number of Dependent Children Under 18: _____  
Ages of Children:  
Pregnant: Yes No  
Specify Other Family Members Living in Household:

**EDUCATION**

<table>
<thead>
<tr>
<th>High School Attended:</th>
<th>Graduated: Yes No</th>
<th>Highest Grade of Education:</th>
<th>GED: Yes No</th>
</tr>
</thead>
<tbody>
<tr>
<td>College/Adult Education Program:</td>
<td>Completed Program: Yes No</td>
<td>Course(s) Completed:</td>
<td></td>
</tr>
<tr>
<td>Currently in School: Yes No</td>
<td>F/T</td>
<td>P/T</td>
<td>Location &amp; Program Times:</td>
</tr>
</tbody>
</table>

**PROGRAM STATUS**

Currently Enrolled in:  
Anticipated End Date:  
Location & Program Times:  

**EMPLOYMENT HISTORY/STATUS**

Currently Employed: Yes No  
Unemployed  
Receiving Unemployment: Yes No  
Exhausted UI

Current or Last Employer:  
Location:  
Start Date:  
End Date:  
Hours Worked:  
Wages:  
Job Title/Description:  
Reason(s) for Leaving:
**CURRENT TAFDC RECIPIENT:**
Currently in receipt of TAFDC, on behalf of themselves and their children (not only for the children in their care).

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

If No, must meet another eligibility criteria (unrelated to TAFDC). Do not finish this section.

If Yes, continue:
- In receipt for ≥ 30 months: Yes No
- Length of receipt: __________
- Within 12 months of Time Limit: Yes No
- Date of Time Limit: __________

If Yes to either question = 70% Eligible
If No to both questions, but still a current recipient, try for 30% eligibility.

**FORMER TAFDC RECIPIENT:**
Case Closed Due to Time Limit.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

If Yes = 70% Eligible
If No, must meet another eligibility criteria (unrelated to TAFDC).

Last Receipt of TAFDC: __________

**Note:** If within 12 months of receiving TAFDC, may still be eligible for DTA-authorized child care and transportation.

**CURRENT TAFDC RECIPIENT:**

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nonexempt (has a Time Limit)</td>
<td>Work Required</td>
</tr>
</tbody>
</table>

**CDC Received Documentation from DTA Certifying Above TAFDC Information:**
Yes No On Request

**NONCUSTODIAL PARENT:**
Unemployed: Yes No Underemployed: Yes No Has Difficulty Paying Child Support: Yes No

If YES to any of these questions, and if agreeable to Personal Responsibility Contract, continue:

- Minor Child or Custodial Parent is: current TAFDC recipient AND in receipt for ≥ 30 months OR within 12 months of Time Limit. Yes No
- Minor Child is eligible for, or is receiving, TAFDC. Yes No
- Minor Child received TAFDC in the past 12 months, but no longer in receipt. Yes No
- Minor Child is eligible for, or is receiving: Food Stamps SSI MassHealth CHIP

If YES to any of these questions = 70% Eligible

**CDC Received Documentation from DOR/CSE & DTA or DMA Certifying Above Information:**
Yes No On Request

**CHILDREN AGING OUT OF FOSTER CARE:**
Between 18 – 24 Years: Yes No If Yes, AND if before turning 18, were:
- Recipients of foster care maintenance payments Yes No
- In foster care under the state's responsibility Yes No
- If Yes to either question = 30% Eligible

**CDC Received Documentation from DSS Certifying Foster Care Information:**
Yes No On Request

**INCOME BELOW POVERTY**
Is a Custodial Parent: Yes No If Yes, Continue: Number in Family: __________ Annual Family Income: __________

Comparing Wages Documentation to HHS Poverty Guidelines, Income of Custodial Parent is Below 100% of Poverty Line: Yes No

If Yes = 30% Eligible

**OTHER BARRIERS (circle):**
School Dropout Teen Pregnancy Poor Work History Resides in EZ Public Housing Substance Abuse Domestic Abuse Disability Limited-English Homeless/Shelter Difficulty Completing Programs Other: __________

If current TAFDC recipient AND if any of the above applies = 30% Eligible

I hereby certify and attest that the information stated above is true and accurate, and understand that the above information, if misrepresented or incomplete, may be grounds for termination from the program. I acknowledge that the accuracy of the information for eligibility is subject to external verification and may be released for such purposes.

<table>
<thead>
<tr>
<th>Applicant Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDC Recruitment Manager Signature</td>
<td>Date</td>
</tr>
</tbody>
</table>
# DEMOGRAPHICS CHART

<table>
<thead>
<tr>
<th>CHARACTERISTICS OF THE TARGET POPULATION</th>
<th>Planned Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GENDER</strong></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td></td>
</tr>
<tr>
<td><strong>ETHNICITY</strong></td>
<td></td>
</tr>
<tr>
<td>African/Caribbean American</td>
<td></td>
</tr>
<tr>
<td>Asian/Pacific Islander</td>
<td></td>
</tr>
<tr>
<td>Cape Verdean</td>
<td></td>
</tr>
<tr>
<td>Caucasian</td>
<td></td>
</tr>
<tr>
<td>Central or South American</td>
<td></td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td></td>
</tr>
<tr>
<td>Other – Specify:</td>
<td></td>
</tr>
<tr>
<td><strong>BARRIERS</strong></td>
<td></td>
</tr>
<tr>
<td>CORI</td>
<td></td>
</tr>
<tr>
<td>Pregnant, Parenting or Primary Caregiver</td>
<td></td>
</tr>
<tr>
<td>Basic Skills Deficit*</td>
<td></td>
</tr>
<tr>
<td>Disabled (Includes Learning)</td>
<td></td>
</tr>
<tr>
<td>First Language is:</td>
<td></td>
</tr>
<tr>
<td>School Drop-Out</td>
<td></td>
</tr>
<tr>
<td>Homeless</td>
<td></td>
</tr>
<tr>
<td>New Bostonian or Refugee</td>
<td></td>
</tr>
<tr>
<td>TANF Recipient</td>
<td></td>
</tr>
<tr>
<td>BHA Resident</td>
<td></td>
</tr>
</tbody>
</table>

*Examples of a Basic Skills Deficit:
TABE Reading and Math scores below 9th grade for English speakers
BEST scores below level 7 for speakers of other languages.
# Work Readiness Training

## Class Schedule

**Program:**

Please complete the following profile using one page for each training area and each cycle.

<table>
<thead>
<tr>
<th>Cycle #</th>
<th># of Students:</th>
<th>Training Area:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Time</th>
<th>Day (CIRCLE DAYS)</th>
<th>Number of Weeks</th>
<th>Number of Days per Week</th>
<th>Hours per Day (Instructional ONLY)</th>
<th>Other Planned Hours per Day</th>
<th>Describe Other Planned Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM</td>
<td>M T W</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PM</td>
<td>TH F S</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Pathways to Success Training & Outreach
TANF Recipient? Low income? Non-custodial parent?

TIME TO WORK...

Let us help you find good entry-level jobs in stores, offices, schools, and hospitals!

PATHWAYS

TO SUCCESS

Job Readiness Training, Job Placement and Case Management Services

5-week classes begin September 24 and October 29 at convenient Downtown Crossing locations

Visit your One-Stop Career Center NOW or call our Outreach Specialists TODAY!

Dorchester Bay Economic Development Corporation
Lourdes DeJesus
617-825-4200
x203

A collaboration of Boston workforce development agencies
PATHWAYS TO SUCCESS
Monday, October 29, 2001 - Friday, December 7, 2001
Jewish Vocational Service
29 Winter Street
Boston, MA

Program Summary:

PATHWAYS TO SUCCESS is a welfare-to-work job training program funded by the U.S. Department of Labor and operated by JVS in association with Action for Boston Community Development (ABCD) and Dorchester Bay Economic Development Corporation.

Program components include:

- 5 weeks of Job Readiness Training (JRT)
- workplace education
- pre- and post-employment case management
- structured job search
- customized job-based education and training
- career/educational counseling
- continuing education and training
- job re-placement services
- assistance in upgrading employment

JRT will focus first on personal and career development, then on job search and job retention skills. Activities will include employer visits, practice interviewing, and learning conflict resolution strategies.

JVS instructors and job developers will collaborate closely with employer partners to customize job-based education and training, developing the specific skills and competencies required for targeted jobs.

The Workplace Education curriculum will include basic math and English review, vocabulary development, and an introduction to computers and other office technologies.

Learning activities will incorporate real-world materials and resources in order to provide participants with the practical personal and professional skills needed to secure and retain employment.

Participants will work closely with JVS employment specialists to ensure successful job placement after the completion of the program. Case managers will be assist participants in overcoming barriers to attendance, participation, and employment.
PATHWAYS TO SUCCESS...
5 Week Job Readiness Training Cycle

Week One:

- Client attends orientation with Career Development Specialist or Case Manager to become familiar with program components.
- All discussions, ice breakers, sharing is intended to bond members of the group.
- Information, from Dept. of Revenue/Child Support Enforcement, Greater Boston Legal Services and DTA on rights, and on CORI's, substance abuse, domestic violence, and any other issues that impact employment.
- Life portraits developed to look at personal histories and identify patterns, barriers, strengths and priorities.
- Introduction to skills, interests and abilities in preparation for job search, goal setting and interviewing.
- Also covered are need for punctuality, using professional vocabulary, dressing for success, time management, managing child care and transportation needs.

Weeks Two and Three:

- Client attends job readiness classes which cover all aspects of job search. In this time clients will complete:
  - Resume
  - Cover letters to fit a variety of jobs they seek
  - Mock interviews with instructor and outside evaluators
  - Job Search using the internet, newspaper and leads from job developers
  - Presentations on dressing appropriately, grooming and hygiene
  - Faxing cover letters and resumes
  - Phone skills to follow up and track progress with potential employers.

Weeks Three and Four:

- Clients will be introduced to goal setting and motivated to narrow their focus and identify their career interests. Classes will introduce clients to:
  - Their learning styles and personality types
  - Teamwork
  - Specific goal setting for one month, 3 month and year periods
  - Identifying and articulating interests, skills and ability with confidence, clarity and specificity.
PATHWAYS TO SUCCESS...

Week one: (Orientation) Client will attend orientation with Career Development Specialist where client will become familiar with The "PATHWAYS TO SUCCESS". Ice breaker, information on how to overcome or handle issues and barriers to employment. Orientation consists of introductions of all participants, and reasons for attending program. Participants will also develop a life portrait of themselves following a presentation. This method allows everyone to have a discussion and learn about others. There will be a discussion on skills, interests and abilities, getting to work on time, using professional words. Dressing for success, scheduling, getting to work on time especially with children.

Participants will have an opportunity to know their Case Manager, Job Readiness Instructor, and Career Development Specialist. Professionals guess speakers from a variety of agencies such as Department of Revenue, Welfare to Work rights CORI Information, Drug use and Employment. Professional guess speakers will be invited to represent different Theme/ Subjects when necessary ( ). Participants will take a daily ten-minute break and thirty minutes lunch.

Week two, three and four: Participants attend job readiness classes, Job Instructor reviews career plan, and Participant’s presentation of career plan. Skills needed for selected careers, introduction to resume writing… participants will have discussion groups, review information offered during orientation, mock interviews, dressing for success, typing resumes and cover letters, typing cover letters, preparing for interview, filling out applications and job searching faxing and refaxing
<table>
<thead>
<tr>
<th>JOB READINESS TRAINING</th>
<th>WEEK 1</th>
<th>WEEK 2</th>
<th>WEEK 3</th>
<th>WEEK 4</th>
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<tr>
<td><strong>FOCUS</strong></td>
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<tr>
<td><strong>WANTS AND NEEDS</strong></td>
<td>Wants and needs</td>
<td>Work</td>
<td>Choose a Job</td>
<td>Get the Job</td>
<td>Keep that Job</td>
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<td><strong>CORE CURRICULUM</strong></td>
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<td><strong>PERSONAL DEVELOPMENT</strong></td>
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<tr>
<td><strong>DAY 1</strong></td>
<td>personal strengths and weaknesses</td>
<td>employer visits and presentations</td>
<td>Job Search Skills I</td>
<td>Professional Development</td>
<td>Job Retention Skills</td>
</tr>
<tr>
<td><strong>DAY 2</strong></td>
<td>life skills and daily activities</td>
<td>basic employability skills</td>
<td>applications</td>
<td>presentation and appearance</td>
<td>workplace culture and ethics</td>
</tr>
<tr>
<td><strong>DAY 3</strong></td>
<td>interests and aspirations</td>
<td>entry-level opportunities, skills, and training</td>
<td>cover letters and telephoning</td>
<td>interviewing</td>
<td>organization and time management</td>
</tr>
<tr>
<td><strong>DAY 4</strong></td>
<td>barriers to personal growth</td>
<td>career ladders and career planning</td>
<td>employer visits and presentations</td>
<td>thank yous</td>
<td>communication and relationship building</td>
</tr>
<tr>
<td><strong>DAY 5</strong></td>
<td>personal goals and futures planning</td>
<td>resume and references</td>
<td>feedback and follow up</td>
<td>decision making</td>
<td>conflict resolution</td>
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<td>POST JRT</td>
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<tr>
<td><strong>FOCUS</strong></td>
<td><strong>Personal Development</strong></td>
<td><strong>Career Development</strong></td>
<td><strong>Structured Job Search</strong></td>
<td><strong>Client Services</strong></td>
<td></td>
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<tr>
<td><strong>ACTIVITIES</strong></td>
<td>re-assess barriers to personal growth</td>
<td>job shadowing</td>
<td>1:1 with job developer</td>
<td>resources</td>
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<tr>
<td></td>
<td>re-develop goals and futures plan</td>
<td>internship</td>
<td>Job Club</td>
<td>referrals</td>
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<td></td>
<td>access resources and supports</td>
<td>on-the-job training</td>
<td>resource room</td>
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<td>customized skill building</td>
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<tr>
<td>WORKPLACE EDUCATION</td>
<td>WEEK 1</td>
<td>WEEK 2</td>
<td>WEEK 3</td>
<td>WEEK 4</td>
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<tr>
<td>NUMERACY</td>
<td>basic math review</td>
<td>concepts of business math</td>
<td>rounding off and estimating</td>
<td>using a calculator</td>
<td>personal money management</td>
</tr>
<tr>
<td>LITERACY</td>
<td>speaking and listening skills</td>
<td>business English</td>
<td>vocabulary development</td>
<td>reading for information</td>
<td>note-taking and note writing</td>
</tr>
<tr>
<td>OFFICE SKILLS</td>
<td>answering the phones and greeting customers</td>
<td>taking messages and scheduling</td>
<td>keyboarding and data entry</td>
<td>forms, filing, and copying</td>
<td>faxing and mailing</td>
</tr>
<tr>
<td>COMPUTER SKILLS</td>
<td>introduction to PCs and MS Windows</td>
<td>introduction to MS Word and desktop publishing</td>
<td>introduction to Internet, e-mail, and on-line applications</td>
<td>introduction to spreadsheets and databases</td>
<td>customized computer skills upgrade</td>
</tr>
</tbody>
</table>
Leadership Development Workshop
Agenda

2:00 – 2:50 PM

I. Welcome/Introductions – getting to know you (ice breaker)

II. Purpose of the group and the importance of having a support group

III. Training information

IV. A little about Dorchester Bay & WtW program

2:50 – 3:00 Ice Breaker

3:00 – 4:00 PM

V. Leadership Development
   - What is a leader
   - Who is a leader
   - Qualities of a leader
   - Leaders role and responsibility
   - Working as a group and skills needed to be a more effective leader

VI. Group discussion

VII. Sum-up, evaluation, and schedule next workshop
What is leader?

A leader is someone who helps show us the directions we want to go and who helps us go in those directions. All of us in our own lives have had people who played that role for us: parents, teachers, friends, spouses, and children. Leaders give us a sense not only of who they are but also of who we are. Good leaders are willing to step outside of themselves into others’ lives.

Who are leaders?

Leaders are people that others follow.

What kinds of people make the best leaders?

There is no one type of person that makes the best leaders. Leaders are women and men, young and old, black, white, Hispanic, and Native American, rural and urban, working and poor. Leaders are born, leaders are made through experience, work, and training.

Webster’s definition:

Leader: a person or thing that leads; directing commanding, or guiding head, as of a group or activity.
Leadership: the position or guidance of a leader; the ability to lead; the leaders of a group.

Styles of leadership

Leaders are different from each other in many ways. Just as all of us respond to different kinds of people, different groups respond to different styles of leadership. Two examples of leaders:

- Leaders who Organize and Implement Group Decisions
- Leaders who Inspire and Build the Group

When do people become leaders?

People become leaders when they suddenly see leadership as a real possibility for them.
Qualities of a Leader

- A good leader likes people; trust people
- A good leader is a good listener
- A good leader makes friends easily
- A good leader help people believe in themselves
- A good leader works hard
- A good leader does not get discouraged too often
- A good leader has a sense of her or his own identity
- A good leader is self-disciplined
- A good leader is honest
- A good leader has vision
- A good leader has a sense of humor

Good leaders are people who are respected by their friends, their neighbors, their families, and the other people they work with. One of the best qualities a leader can have is the ability to work cooperative with other leaders.

Working as part of a group has many advantages

- You feel less isolated
- You can benefit from the ideas that other have
- You have a chance to watch other people working and learn from them
- You have a sense of solidarity

Skills that a leader need

- Listening skills
- Ability to set goals
- Ability to identify issues
- Ability to communicate with others
- Ability to work with others
- Negotiations skills

Role of a leader

- Directs and guides group
- Develops a follower
- Establishes trust and confidence
- Takes initiative
- Share responsibility
- Conducts meeting
What do people need to become leaders?

- **An opportunity to act**
  Because we learn through doing.

- **Trust**
  Becoming a leader is taking a risk. Leaders will only take that risk when they know and trust those around them. It always comes down to building strong relationships.

  **Support and encouragement**
  Organizers must help potential leaders overcome insecurity and fear by giving praise and recognition.

- **Knowledge and tools**
  No one knows how to do the tasks of leadership until they learn. We should take the time to learn.

- **Role models**
  Leaders teach other leaders. The best leaders inspire people not just to follow the leaders, but to follow themselves, to grow in their own abilities, to give direction to their own lives.
How do you recognize a leader?

- Leaders have followers. People listen to them. They are connected to the formal and informal networks in the community.

- Leaders are reliable. They do what they say they are going to do.

- Leaders are motivated. They have a personal reason for becoming involved.

- Leaders take responsibility for their own work, for the group, and for pushing things forward.

- Leaders are willing to learn and to grow.

- Leaders are willing to share power and responsibility. They develop other leaders.
Economic Literacy Workshop
Dorchester Bay Economic Development Corporation
Welfare-to-Work Support Team
Leadership Development Training II
594 Columbia Road, Dorchester MA
December 4, 2001

Agenda

12:00 – 12:45 PM

I. Welcome/Introductions (ice breaker)
II. Job readiness training information
III. Dorchester Bay & WtW program update

12:45 – 1:00 Lunch Break

1:00 – 3:00 PM

IV. Economic Literacy
V. Group discussion
VI. Sum-up, evaluation, and schedule next workshop
# Personal Budget

<table>
<thead>
<tr>
<th>Income</th>
<th>Now</th>
<th>Monthly Amount</th>
<th>Future</th>
<th>Monthly Amount</th>
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<tbody>
<tr>
<td>Net Pay X pay periods=</td>
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<td>Other</td>
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<td>Other</td>
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<tr>
<td><strong>A. Total income</strong></td>
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<table>
<thead>
<tr>
<th>Fixed Expenses</th>
<th>Now</th>
<th>Monthly Amount</th>
<th>Future</th>
<th>Monthly Amount</th>
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<tbody>
<tr>
<td>Rent or mortgage</td>
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<td>Car payments</td>
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<td>Credit card payments</td>
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<td>Telephone</td>
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<td>Utilities</td>
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<td>Child care</td>
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<td>Insurance (personal and property)</td>
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<td>Savings</td>
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<td>Other</td>
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<td><strong>B. Total fixed expenses</strong></td>
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<tr>
<th>Variable Expenses</th>
<th>Now</th>
<th>Monthly Amount</th>
<th>Future</th>
<th>Monthly Amount</th>
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<tbody>
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<td>Food</td>
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<tr>
<td>Clothing</td>
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<tr>
<td>Transportation (including car and taxis)</td>
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<td>Vacation</td>
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<td>Charitable Contributions</td>
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<td>Cable TV</td>
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<td>Tuition and schooling</td>
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<td>Babysitting</td>
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<td>Other</td>
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<td><strong>C. Total variable expenses</strong></td>
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| **D. Total fixed and variable expenses (B&V)** | | | |
| Difference between income and expenses (A-D) | | | | |

Sample Budget.xls - S. West 12/01
Finding the fat in your budget doesn't sound sexy -- until you visualize the new, svelte you.

In a matter of a couple of years, you can change your entire lifestyle to the better by simply adhering to a few budgetary constraints. Here are my top 10 ways to trim up your budget:

1. **Focus on fixed expenses:** Just because they're "fixed," doesn't mean they're not negotiable. Many items are fixed only in that they come out of your paycheck every month or you write checks for them automatically -- like rent and life insurance. So start at the top. Each budget item deserves a full airing.

2. **Rent or mortgage:** Your home is your castle. But can you afford the one you have? Moving is not something you're going to do tomorrow. But if your castle is eating up more than 25% of your income, start making long-term plans. Add extra money to pay down your mortgage. Think about moving to a cheaper home or apartment. The 1997 tax law provides an incentive to trade down: $500,000 in tax-free capital gains on a home, no matter what your age.

3. **Utilities:** Turn down the heat and air conditioning. Analyze your phone needs. Do you need so many lines? Is your cell phone essential?

4. **Insurance:** If your term life insurance policy is five or more years old, you're in for a pleasant surprise. Term rates have been heading straight down over that period. You can almost certainly get a better rate. Increase the deductibles on your auto and homeowner's policies, too, to save money, and drop collision insurance if your car is paid for. Don't skip disability insurance, though. If you can't work due to a disability, you could jeopardize everything without insurance.

5. **Groceries:** Think about the foods that are really pleasurable to you. Don't cut corners there. But how about bottled water? Is there any difference between the brand for $1.99 and the one for $3.99? Do you really enjoy the prepared foods you buy? Could you make something
fresh and simple — and cheaper?

6. **Clothing:** What can we say? The biggest enemy of a clothing budget is impulse. You need a strategy. Make a list of what you need. Shop from your list. Buy the best you can afford. Think about all the stuff you have hanging in your closet.

7. **Transportation:** This item can eat up 50% of a budget. Don't tell yourself you're going to stop visiting your girlfriend or significant other on the weekends. But take a hard look at where you can save. Set a budget for transportation. Negotiate for bargain airfares. Cars are better made and last much longer than they used to. Get one you like. Take good care of it. And keep it two years longer. Or three. Walk instead of taking a cab.

8. **Household and babysitting help:** It's tough cutting corners here. If you've found a good caretaker for your children, don't cut his or her pay. Supportive people to help in your business and home can make your life run much more smoothly.

9. **Credit:** This one has lots of opportunities for reductions. Pick up two months' worth of credit-card bills and total up the interest you paid. If you pay off your credit cards, you will save that much every month.

10. **Taxes:** Contribute to your 401(k) and make use of health-care and dependent-care spending accounts at work.

Of course, you must focus on discretionary spending as well. The key, however, is to choose something that makes your life better -- that enriches it rather than diminishes it. For example, consider the pat advice to jot down everything you spend in a notebook. How tedious!

But try turning it around. Every time you decide to forgo a purchase, you put that money in your savings bank. You skip a latte, that's $3. You walk instead of taking the bus or subway, $1.50. You pack your own lunch, $10.

So look at discretionary expenses to see what you can do here. Think of positive lifestyle changes. Vacations, too, can be thrilling without being costly if you do some research and plan a trip that allows you to explore and further an interest. "There are lots of ways to economize that have nothing to do with Dacyzyn-like asceticism and that may actually enrich your lives," says Mark Hiatt, referring to Amy Dacyzyn, publisher of the Tightwad Gazette and one of the leaders of the Simple Living movement.

And Mark's right. You can find the fat in your budget. It just takes a little creativity and willingness on your part.
Adjust your priorities.

If you’re like most people, you spend money on things that you really don’t need. Or, you don’t really manage the money you do have; you just spend as expenses come up. But don’t feel bad about this; we’ve all done it! It takes a little more time to develop a management attitude about your spending habits, but it’s essential that you take control of your spending.

Probably the best way to do this, at least at first, is by budgeting. It’s a great way to see where you’re wasting money. As a family exercise, keep a budget for one month. Don’t make it so much trouble that you won’t keep it up; just a rough record will do. Whenever family money is spent, jot it down.

At the end of the month you’ll probably have a real eye-opener. It’s amazing how the little things add up to big dollars!

Let’s take an easy example:

Suppose you and your spouse each purchase two cans of soda (75 cents each) from the vending machine at work each day — one for lunch and one for the afternoon break.

\[
\begin{align*}
\text{.75 per soda} \\
\times 4 \text{ sodas per day} \\
\$3 \\
\times 20 \text{ work days a month} \\
\$60 \text{ spent on sodas!}
\end{align*}
\]

That’s $60 spent on sodas — just at work! Now there are two things you could do to adjust that expense. You could purchase your sodas in less expensive 12-packs at the grocery store and carry them to work OR you could eliminate your soda habit and drink water instead (it’s free and it’s better for you!).

You see how just by making one minor adjustment in your activities, you have “instant money”? There are probably many situations like this in your daily life that could be used to free money for building financial security.

After you’ve done this exercise for one month, sit down with your family members and try to prepare a rough budget for the future. Allow for items like gifts and put a dollar limit on what you will spend for each category.

The main purpose of a budget is this: it gives you control of your own money. You actively decide what will be spent, and where your money can best be put to good use. There’s nothing quite as good as the feeling that YOU are in control of your money, rather than your activities and expenses controlling you.

Budget Guidelines

35% Housing — Spend no more than 35% of net income on housing. That includes: mortgage or rent, utilities, insurance, taxes and home maintenance.

20% Transportation — Spend no more than 20% of net income on transportation. That includes: car payments, auto insurance, tag or license, maintenance, gasoline and parking.

20% Other — Spend no more than 20% of net income on all other expenses: food, clothing, entertainment, child care, medical expenses, tithing and charity.

15% Debt — Spend no more than 15% of net income on all consumer debt: student loans, retail installment contracts, credit cards, personal loans, tax debts and medical debts.

10% Savings — Save at least 10% of income throughout your working life.
Adjust your lifestyle.

Along with controlling your money comes the matter of priorities. And along with setting priorities comes one tough rule of life: you can’t have everything. You have to make conscious decisions about your purchases.

An important part of the budgeting process is separating “wants” from “needs”. Do you “need” a new car? Or do you just “want” a new car? Do you “need” a bigger house, or is it a luxury you’d like to have? If you want to achieve financial independence, you may have to make sacrifices for a period of time. It’s not that tough, but it is very, very important to your financial health.

Earn additional income.

If your family income is very modest, things may be so tight that it’s tough to invest more than $25 a month. If you want to make significant progress, consider taking a part-time job to get the extra income for starting your investment program.

Re-align your assets.

Another way to free up additional income for savings and investment is to re-align your assets. This means that you move assets you have around to produce cash. You may be able to “free up” money to get your investment program started immediately.

There are two major areas in which families are not getting their money’s worth that are great areas to target for adjustment:

A. Low-interest savings accounts or accumulations with banks, savings and loans and insurance companies. You can take money from a 3% savings plan and invest it in an area that has the potential for higher returns.

B. High-cost life insurance. You can replace your outdated, expensive whole life insurance policies with term insurance and potentially save thousands of dollars in premium over time!

Both of these areas are covered in more detail later in this book.

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It’s amazing how the little things add up to big dollars.

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Money-Saving Ideas

<table>
<thead>
<tr>
<th>Change of Habit</th>
<th>Savings Per Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown bag your lunches</td>
<td>$80</td>
</tr>
<tr>
<td>Cut daily specialty coffee purchase to Two times a week</td>
<td>$26</td>
</tr>
<tr>
<td>Skip one pizza per week</td>
<td>$50</td>
</tr>
</tbody>
</table>
Program Evaluation Survey Sample
WtW Evaluation Survey Sample

My Name is ___________ and I am evaluating the Welfare-To-Work Job Collaborative Project in order to determine its effectiveness and its impact in your life and in our community. I would appreciate having an opportunity to hear your opinions about this project. The survey will take about 10-15 minutes to complete and your response will be summarized along with those of others who responded, and will be used for future improvements without revealing anyone's name. Would you be willing to participate in this survey?

Yes___ No___

1. What was/is your involvement in this project (please choose one below)?
   - A collaborative member
   - Recruitment Coordinator
   - Trainer
   - TAFDC recipient
   - Employer
   - Partner

Program Coordinators
2. How would you rate the effectiveness of this project (please rate 1-5; 1=not effective, 5=very effective)? 1 2 3 4 5

3. How would you rate the selection criteria?
   - Excellent
   - Good
   - Fair
   - Poor
   - Other (please explain)
Recipients

4. Are you a TAFDC recipient? Yes____ No____. If yes please answer the following questions:
Did you receive any support services from this project (please check all that apply)?

☐ Transportation
☐ Training
☐ Child care
☐ Car pooling
☐ Social service assistance
☐ On site orientation
☐ Counseling
☐ Case management services

5. How would you rate the quality of training?
☐ Excellent
☐ Good
☐ Did not meet my needs
☐ Poor

6. Did you receive any post-employment assistance? Yes____ No____. If yes how helpful was it?
☐ Very helpful
☐ Helpful
☐ Somewhat helpful
☐ Not helpful

7. Were you employed through this collaborative project? A. Yes____ No____ B. If yes what type of job_____________________________________________________
C. Where?____________________________________________________________
D. Salary rate per hour (circle one)?
   ☐ $8-$10
   ☐ $10-$12
   ☐ $12-$15
   ☐ $15+

On the Job Retention

8. Are you an employer?____ a placement coordinator?____ Other____ How many TAFDC were employed by you?________
9. How many TAFDC keep their job successfully? ______

10. What are some of the barriers you encountered:

A. Before job-readiness training and employment?

B. During job-readiness training and employment?

C. After job-readiness training and employment?

Please explain: ____________________________________________

_________________________________________________________________

_________________________________________________________________

11. What recommendations would you make to help improve the effectiveness of this
project? Please describe (if possible at each stage):

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________

12. What skills have you gained as a result of this project? ______________________

_________________________________________________________________

13 What experiences have you gained as a result of this project?

Please explain: ____________________________________________

_________________________________________________________________
Photos
DBEDC WtW Working Team

Action Team
Computer Training

Action Team