

# STRATEGIC PLAN

FY 2015-2017



**JANE  
ADDAMS  
RESOURCE  
CORPORATION**

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**Through strategic planning, the agency has strengthened execution of its mission by enhancing the synergy between its lead strategies and program models.**

## JARC MISSION

The Jane Addams Resource Corporation (JARC) promotes strong communities, businesses and households to ensure that people who work do not live in poverty.

JARC provides high quality skills training and support services to help lower-income and unemployed workers achieve self-sufficiency. JARC provides economic and workforce development to businesses to improve their competitiveness.

## JARC VALUE STATEMENT

### We believe...

- that everyone who works has the right to a living wage; that training leads to better paying jobs; and that the key to long term, substantive change for people is a focus on careers.
- that business and employee success are inextricably tied; we work to bridge economic activity and people.
- in supporting the regional manufacturing base because it is a source of careers and living wages.
- that best practices should inform public policy and that JARC has a role to play in shaping that policy.

### We value...

- our clients' efforts to be better prepared for work and life; and we present them with opportunities and support them in pursuit of their goals.
- a warm, welcoming and inclusive environment.
- quality services.

### We maintain...

- high standards and we have high expectations for ourselves, our clients and our partners.
- unquestionable ethics demonstrated through transparency, honesty and fairness.
- a nimble organization that responds quickly to changes in our environment and to the needs of our customers.

[Adopted 2011]



# Mission & Values

## Profile of Agency and Current Position

JARC helps low-income workers, job seekers and community residents attain financial self-sufficiency through skills training and support services. The combination of these strategies creates a more holistic approach to helping low-income individuals and families move from poverty to the financial mainstream.

### Addressing Poverty

As of January 2014, the official unemployment rate in Illinois and the Chicago area remains close to 9%, a conservative figure that ignores discouraged job seekers and those who are underemployed. The U.S. poverty rate is the highest it has been in the last two decades. In 2010, the U.S. Census Bureau reported that nearly one in seven Americans were living in poverty - the highest rate since 1993.<sup>1</sup> Children represent over one-third of all of those living in poverty, and African Americans and Latinos represent over two-thirds.<sup>2</sup>

are living at or below the federal poverty level and 73% are minorities. JARC's programs are needed now more than ever.

### Addressing Skills Gaps

Locally and nationally the demand for better skilled workers continues to increase among manufacturers and related businesses. Middle-skills gaps in the manufacturing sector continue to exceed the capacity of the regional workforce system to fill these vacant jobs. Unfilled job vacancies are a barrier to economic growth and regional competitiveness.



As middle class Americans continue to sink into poverty, they rely more heavily on public assistance. JARC sees this play out firsthand in its Center for Working Families (CWF). As a CWF, JARC provides support services that promote mainstream financial behavior and self-sufficiency. 82% of CWF clients

Economic and workforce development policy discussions have shifted their focus to sector-based, industry-driven programming in the manufacturing sector. JARC's job training and workforce development programs target skills gaps in the regional manufacturing sector such as Computer Numerical Control (CNC) machinist and welder. These industries and occupations offer family sustaining wages, benefits and career paths that move people out of poverty.

1. U.S. Bureau of the Census: Social, Economic, and Housing Statistics Division. "Poverty and Households," <http://www.census.gov/hhes/www/poverty/index.html> (updated June 25, 2012).
2. U.S. Bureau of the Census, Income, Poverty, and Health Insurance Coverage in the United States: 2010, Report P60, n. 238, Table B-2, pp. 68-73.



## Strategic Plan 2011-2014

In JARC's Strategic Plan 2011-2014, the agency focused on quality, synergy and sustainability. The agency's programs were organized into clusters that aligned with two best practice models: the Sector Model to workforce development and the Center for Working Families (CWF) model of bundled financial services. All agency initiatives were refocused to gain greater synergy between the agency's mission, core competencies, and link to at least one of the two models. Activities that did not forward the mission or align with these models were discontinued. Goals and initiatives focused on program innovation, infrastructure improvement and policy engagement. With this plan, JARC gained the perspective it needed to navigate a critical juncture in its history.

### Financial Position Today

JARC's current financial position is strong and stable. In the last four years, the agency's budget has grown from \$1.3M to \$2.1M – an increase of 65%. During this period of growth, the agency has raised its profile among non-government funders increasing foundation support from \$173,000 in FY11 to over \$630,000 in FY14.

### The Real Estate Affiliate

JARC's financial position is also strengthened by its non-profit real estate affiliate, the Jane Addams Development Corporation (JADC). JADC owns and operates five commercial buildings for industrial use in Chicago; these properties house 51 companies with 321 employees. JADC's activities advance JARC's mission by promoting industrial retention, but its main purpose is to generate unrestricted funding for JARC: it is the agency's social enterprise. The real estate affiliate accounts for close to 5% of the agency's annual operating budget. Moreover, real estate revenue provides investment capital for

key growth initiatives, such as the Training Center expansion.

### Staffing Levels and Infrastructure

JARC continues to set high standards for efficient use of its resources; 89% of the agency's revenues are applied directly to programs. As part of the last strategic plan, JARC expanded its manufacturing training center to increase capacity in its training programs. JARC's Community Technology Center has also added a second computer lab at the main office. As its programs have grown, staffing levels have increased from 12 employees in January 2010 to 29 employees in January 2014.

### Looking Forward

The Strategic Plan for 2015 - 2017 builds on the preceding plan of 2011-2014. JARC will continue to balance growth and high-quality services. The agency will continue to produce best practice programming and expand the public face of the organization through improved communication.



## The Strategic Planning Process

Beginning in the summer of 2013, JARC undertook a comprehensive strategic planning process. This process began with board and staff de-briefs on the results of the 2011-2014 plan, including program, infrastructure and policy initiatives.

Highlights of the 2011-2014 Strategic Plan included:

- Creation of the Welding Fast Track Program
- Expansion of the Training Center
- Re-alignment of JARC's business services with the sector-based training programs
- Reinvigoration of JARC's leadership role in advocacy efforts

The agency retained Jeff Marcella, a NonProfit and Public Sector Consultant, to facilitate the strategic planning process. He conducted internal and external scans, and led a Strategic Planning Committee of staff and board members. Mr. Marcella was chosen because of his knowledge of JARC, expertise in the Sector model and workforce development in Chicago, and experience facilitating nonprofit strategic planning.

Scans revealed that JARC's stakeholders value key aspects of programs:

- ✓ Open entry/open exit training model
- ✓ Holistic bundling of services for program participants
- ✓ Expertise in advanced manufacturing
- ✓ Leadership in workforce policy and the sector-based approach to workforce development

- JARC conducted a **comprehensive internal scan**, through:
  - Staff interviews
  - Interviews with employer partners
  - Interviews with funders, partners and peer organizations
  - Focus groups with volunteers and program participants
  - A survey distributed to volunteers
  - Consultant analysis of the organization and feedback
- Team members interviewed ten nationally recognized programs as part of an **external best practices scan** in order to harvest their insights, lessons and best practice approaches. Several of these directly influenced the goals of this plan.
- Finally, the **Strategic Planning Committee convened a Discussion Series** during which key members of JARC's staff and board considered the internal and external scan reports and a series of "White Papers". The White Papers were written by staff and addressed central issues of JARC's future development. The White Papers were then distilled to form the core initiatives of this plan.

## Meeting the Strategic Challenges for FY2015-2017

The internal and external scans offered valuable insights into the challenges and opportunities that the agency and its stakeholders will face in the next period of its evolution. This process of discovery informed this strategic plan.

This new plan will focus on three initiatives:

**STRATEGIC INITIATIVE 1** – JARC will identify and adopt the best strategies for scalability, including geographic expansion and/or replication in order to provide greater impact in the manufacturing sector and in low-income communities throughout the Chicago metro region.

**STRATEGIC INITIATIVE 2** – JARC will build upon the previous strategic plan by deepening the synergy between the Center for Working Families Model and the Sector Model.

**STRATEGIC INITIATIVE 3** – JARC will focus on expanding its public profile through improved marketing and communications, particularly related to the expansion and integration of efforts that are at the heart of this plan.

There is great synergy between JARC's two program-related initiatives, Initiative 1 and Initiative 2:

- As JARC scales up and replicates its services region-wide, it will be critical to maintain high-quality, holistic services when increasing the number of customers.
- As JARC builds synergy between its two models, it will become even more efficient and have a larger impact by increasing capacity to serve more people.





# Strategic Initiative 1

**SCALABILITY:** JARC will identify and adopt the best strategies for scalability, including geographic expansion and/or replication in order to provide greater impact in the manufacturing sector and in low-income communities throughout the Chicago metro region.

## Background

Skills gaps in the manufacturing sector create opportunity for low skilled workers and job seekers. However, the current combined efforts of the workforce system fall short of meeting current and projected employer labor market demand for skilled labor.

The recent internal scan of JARC's stakeholders showed consensus on two points: 1) JARC's programs are excellent and 2) JARC should expand. JARC is mindful that expansion should not be made at the expense of quality. The agency stands ready to grow in a coherent, deliberate manner within its focus areas, and while maintaining quality.

## Rationale

JARC is well positioned to capitalize on the current favorable direction of public policy and the continued labor market demand in manufacturing.

- JARC's strategies have gained traction with critical shifts in public policy: 1) advanced manufacturing is viewed as a priority for the nation's economic and workforce development policies; and 2) the sector approach to job training and workforce development is now universally regarded as the best practice. JARC's programs, expertise and focus are strategically aligned with workforce policy at the federal, state and regional levels.
- Middle skills gaps in the manufacturing sector continue to outstrip the capacity of the regional workforce system. A study by Deloitte and the Manufacturing Institute finds that there are 600,000 unfilled manufacturing jobs in the U.S., including 30,000 here in Illinois (mostly in the Chicago metropolitan region). Unfilled job vacancies are both a barrier to economic growth and competitiveness – and a tragedy when unemployment remains so high.
- Since January 2011, JARC's Careers in Manufacturing Programs (CMP) have placed 200 graduates with 122 firms throughout the Chicago metro region; 28 of these companies have hired between two and 17 graduates. JARC's employer partners value JARC as their best resource for entry-level hires; however, JARC's outputs and the outputs of the entire workforce system fall far short of the 30,000 projected vacancies.
- To compound the problem, employers face significant skills gaps among their incumbent workers. JARC is one of the only training providers in the Chicago metro region that delivers skills training on the firm side; JARC's employer partners would like to see these programs grow.





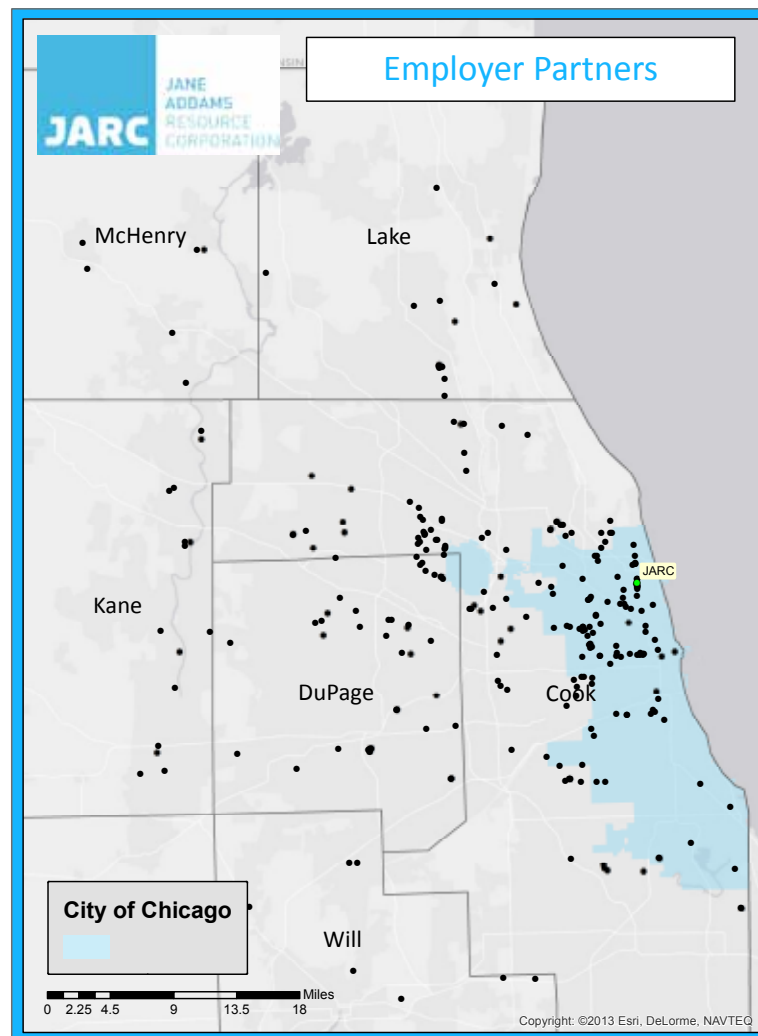
## Action Steps

In this strategic plan, JARC seeks to scale up the scope and impact of its programs as well as those of the larger workforce system in the Chicago metro region to help better meet employer demand. JARC will execute a three-pronged approach – growth of its existing programs and facilities; geographic expansion within the Chicago metro area; and replication of its program model through partnership with other training providers. JARC can combine elements of these strategies to layer its approach. These perspectives are outlined in more detail below.

- **Continued, vertical growth** – In 2013, JARC added 1300 square feet to its Training Center for the Metalworking Trades (an increase of 30%) to expand training capacity for its CNC, Welding, Bridge and incumbent worker training classes. JARC will continue to build capacity in its current location and existing programs.

- **Geographic expansion** – Under this plan, the agency will expand its geographic footprint in the Chicago metro region through public-private partnerships with suburban stakeholders. Suburban businesses already utilize JARC's incumbent worker training but will now also benefit from a more local source for skilled new workers. JARC can leverage its role as a training provider in the Workforce Investment Act system to form similar partnerships with the suburban workforce boards. JARC will execute training programs in manufacturing facilities operated by or in conjunction with suburban partners. It will be critical to ensure that the goals and expectations of potential partners are aligned with JARC's and that all partners share in decision-making. Geographic expansion advances the agency's mission; it ensures the

### JARC's Manufacturing Training Programs are Already Regional in Scope



**Placement data** from JARC's Careers in Manufacturing Programs reveals the regional nature of the manufacturing sector and the geographic dimension of the scalability discussion. 99% of CMP graduates are city residents, but 64% of the job placements are with suburban employers. Employers and industry allies alike would like JARC to increase scale and its geographic reach.

JARC is one of the only training providers in the Chicago metro region that delivers **customized incumbent worker training**; an expanded physical presence in the region would allow it to design and execute higher touch, technical programs for suburban companies. Its employer partners are found throughout the seven-county metropolitan area."

The planned *Metro West Manufacturing Collaborative* is an example of this perspective. For this project, JARC will partner with the Alliance for Illinois Manufacturing (AIM) and community based organizations in western Cook and DuPage County to expand its training programs' geographic reach.

continued relevance of the agency at a time of great opportunity and increased competition.

- **Replication** – Under this plan, the agency will deepen its impact by building on the local workforce system to replicate its best practice programs in partnership with other agencies. JARC will provide leadership and content for a systemic effort to close the skills gap in manufacturing and create more opportunities for job seekers in low-income communities. This effort will further expand JARC’s role as a thought-leader and a model of best practices in workforce development, and further JARC’s mission by helping other organizations deliver services through the JARC models. Quality remains the highest priority: JARC will continue to be selective in its approach to partnership and collaboration. An example of this strategy is JARC’s new partnerships with Wider Opportunities for Women and Chicago Women in the Trades to replicate JARC’s Women in Manufacturing Program.

## Success Measures

JARC will know it has succeeded in this strategy when:

- JARC’s job training programs and models demonstrate the benefit of increased investment and capacity through increased outputs, such as industry certifications, job placements, and retention at a second location.
- Partner programs are utilizing JARC’s model, performing well and attracting additional support.
- JARC recoups its investment of time, resources and money and generates revenue as a result of these activities.
- JARC’s existing sites and programs continue to prosper, having seen no negative impact from expanding efforts elsewhere.



## Impact

In three years, JARC will have one or more existing partnerships within the Chicago metropolitan area that deliver manufacturing training under the JARC model, that provides value to businesses, job seekers and the local economy, and expands JARC’s reach and influence in workforce development system.

**SYNERGY:** JARC will build upon its previous strategic efforts by deepening the synergy between the Center for Working Families Model and the Sectoral Model.

## Background

During the 2011-2014 strategic planning process, JARC determined that “*synergy between programs and leveraged resources will be key in the next period of JARC’s evolution.*” A further outcome of the planning was that all of JARC’s programs would connect to one of two models: the sector model of workforce development and the Center for Working Families model for increasing household income and asset building.

Today, these service delivery models are reflected in the organizational structure. Training services are split into two clusters of programs following the dual-customer focus embedded in the sector model: Careers in Manufacturing Programs focuses on the demand side and Business and Workforce Services focuses on the supply side. A third cluster of programs - the Center for Working Families (CWF) - executes the delivery of support services.

JARC made progress on this, but the internal scan showed that there is still more to be done. Deeper synergy between the program models will create more holistic services and improved outcomes for program participants.

## Rationale

- JARC’s manufacturing trainees as well as its CWF program participants not only get jobs, but are also moving toward self-sufficiency by paying off debt, renting apartments, improving credit scores and opening bank accounts. Beyond job placement and retention, JARC presents its clients with opportunities for career path employment. Client-centered financial counseling leads to behavior change and self-sufficiency.
- Both the CWF and sector strategies are considered best practices in their respective fields.
  - JARC’s CWF is one of the highest performers in the LISC CWF network. LISC – the CWF’s lead funder – cites JARC as among the best CWF in the country. By all measures, the CWF routinely exceeds its annual goals of net income, net worth, and credit score increases. In fiscal year 2013, the CWF exceeded its goals by an average of 47%.
  - JARC’s manufacturing training programs are among the highest performing of their kind in the country (based on results of the national *Benchmarking Survey*) in terms of job placement and retention. Results for the CNC Fast Track for graduation, job placement and retention (180 days) are 91%, 85% and 90%, respectively. The Welding Fast Track has seen similar success with a 94% placement rate for the first two years and 86% retention (180 days) in the first year.
- The intersection of JARC’s CWF and sector-based program models produces the most formidable success. The interplay between these two strategies is most evident in JARC’s hallmark programs – the CNC and Welding Fast Tracks.

# Strategic Initiative 2



**The Sector Model:**  
“Sector Strategies simultaneously address two sides of the employment equation—the ‘supply side’ that must produce skilled, employment-ready labor (through training, job coaching, counseling, case management, etc.) and the ‘demand side’ that creates and shapes opportunities for workers to use their skills and be compensated for their work.”

- *The Aspen Institute*

**The Center for Working Families (CWF) Model:**  
CWFs are “neighborhood-based hubs that assist low-income families with reaching financial stability and moving up the economic ladder” by bundling financial counseling, employment coaching, computer literacy and public benefits screening “to help families build self-sufficiency, stabilize their finances and move ahead.”

- *Annie E. Casey Foundation*

## Action Steps

Because JARC knows that the key to long-term substantive change is a combination of job training *and* comprehensive support services, JARC will further integrate the CWF and CMP clusters. It is the ongoing support services that place the focus beyond the short-term goal of securing employment, to developing long-term financial stability. JARC will:

- **Continue focusing on “bundling” of services for all customers**, including literacy, adult education, job coaching, training, support services, placement and retention services.
- **Align CWF’s Employment Services with the best practices used in JARC’s training programs**, such as a simulated workplace, worker accountability and standard operating procedures for job referrals.
- **Deliver in-service, cross-departmental trainings** that will promote information sharing among all three clusters.
- **Deepen job retention strategies** and align job retention activities with financial counseling services.
- **Integrate the CMP and CWF budgets** to recognize the cost of bundled services per person in job training.
- **Increase capacity in financial education, job development and retention services.**
- **Identify and document the long-term implications for the intersection of these two models.** What does the interplay of the program models mean for JARC’s clients and what does it mean for JARC’s policy work?

## Success Measures

JARC will know it has succeeded in this strategy when:

- All JARC stakeholders recognize the value added through the synergy between JARC’s two core program models.
- All of JARC’s manufacturing trainees are offered comprehensive financial counseling and support services through the Center for Working Families model, recognizing that holistic services are essential to the success of a sector approach.
- Staff are integrated across programs and deliver services in a consistent manner, at the same level of quality.
- Employer partners are accessing a wider pool of JARC candidates to meet all of their hiring needs beyond production jobs and will see improved retention in a workforce that is financially stable and ready to move up the career ladder.

## Impact

JARC will be known as a coherent and comprehensive program model with two main program areas capitalizing on one another’s strengths in holistic services for job seekers and businesses.



# Strategic Initiative 3

**COMMUNICATIONS:** JARC will focus on expanding its public profile through improved marketing and communications, particularly related to the expansion and integration efforts that are at the heart of this plan.

## Background

The internal scan revealed that some of JARC audiences have a narrow view of the organization, limited to their specific program involvement.

- Volunteers and clients observe that JARC is “hidden” or “hard to find.” The agency has a limited visual or social presence in the community, so people who could benefit from or contribute to its work unaware of JARC.
- JARC can do a better job of telling its story. For example, in writing grant proposals, the intangibles that make JARC special can get lost; JARC can do a better job of explaining the value of the synergy between its two program models.
- As stakeholders place increasing importance on both qualitative and quantitative measures, JARC must better utilize and communicate its outcomes to demonstrate the impact on job seekers, businesses and the community.

## Rationale

An expanded marketing and communications effort is a necessary component of the future of JARC because:

- As JARC increases capacity, expands to additional sites, and better integrates its programs, the agency must improve its ability to tell its story, and publicize its best practices to many different stakeholders.
- JARC is a thought leader and can lead in the fields of workforce development and manufacturing training – especially regarding the interplay of its Sectoral Model of training and Center for Working Families Model of asset building.
- The communication of JARC’s message, vision and best practices will be critical as the agency organizes stakeholders and supports the wider workforce community (locally and nationally) with a concentrated focus on holistic, sector-driven programming.

## Action Steps

- JARC will continually help staff, volunteers and board members to understand, calibrate and disseminate its message using methods like the “Aligning Mission and Strategies” presentation and “JARC 101” workshop. JARC will also improve its volunteer orientation to give them a broader understanding of the organization. These stakeholders will become better ambassadors for the agency and its programs, empowered with the best information, data, theories and ideas to communicate JARC’s story.



- JARC will develop a comprehensive “Marketing Plan”. The agency will engage external experts on marketing and brand awareness to better construct its narrative and disseminate its messaging using:
  - A wide array of **content** including case studies, best practice narratives, research, policy advocacy, position papers, success stories, etc.
  - **Methods** including social media as well as more traditional print and online communications.
  - Identification of JARC’s **key audiences** (including government, foundations, businesses and volunteers) for marketing and to clarify what kinds of messages are most important to key groups.
- As JARC expands the Board of Directors, it will recruit members with core competencies in marketing, communications and/or public relations. By engaging board members with these competencies, the agency can develop expanded and improved avenues for telling its story and reaching various audiences.
- JARC will consider the creation of a Junior Board as a method of reaching out to a broader network of diverse supporters, particularly young professionals, highly engaged volunteers and emerging business leaders.
- JARC will form an agency-wide Communications Team to work on continued implementation of these ideas and those from the “Marketing Plan” discussed above.



## Success Measures

JARC will know it has succeeded in this strategy when:

- All of JARC’s core activities are tied to and have a clear representation within JARC’s public profile.
- JARC has raised its profile among key donors, employer partners, supporters and thought leaders.
- JARC has increased its corporate support, particularly corporate sponsorship for the annual fundraising event.
- JARC has increased its number of individual donors.

## Impact

By 2017, JARC’s public image will be as strong and positive as the reality it portrays, and JARC will have achieved greater public attention and secured increased resources as a result.

## COMMITMENT TO STRATEGIC WORK:

JARC believes that Strategic Planning is not merely something undertaken every three years to produce a formal Strategic Plan. A grant from the Communitas Charitable Trust matched with funds from the Jane Addams Development Corporation (JADC) has been directed to support the Executive Director to focus on strategic planning making it an ongoing and permanent part of the agency's culture and activities.



## STRATEGIC PLANNING COMMITTEE:

The Strategic Planning Committee included the following volunteer board and staff: Regan Brewer, Neha Chitnavis, Hayley Crabb, Udayan Das, Emily Doherty, Rob Eakins, Margaret Haywood, Guy Loudon, Sheryl Morris, Jessica Newsome, Alex Niemczewski, Manny Rodriguez, Gerardo Salazar, Lisa Skeegan, Mike Slezak, Gary H. Smith, and Jake Williams.

The strategic planning consultant was Jeff Marcella.

The research team was Regan Brewer, Emily Doherty, Guy Loudon, Jeff Marcella, Sheryl Morris, Mike Slezak, and Jake Williams.

The concept papers were written by Regan Brewer, Hayley Crabb, Guy Loudon, and Jeff Marcella.

The graphic art and layout was done by Mary Chase.





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