

**Using Motivation And Training to  
Increase Job Placements for Low-  
Income Older Workers**

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**This is the third of three manuals designed to help Senior Community Service Employment Program practitioners raise their unsubsidized placement rates. The manuals are dedicated with love, admiration and thanks to Dorothy Thomas, who for twenty years devoted her considerable talents and energy to training the National Senior Citizens Education & Research Center's SCSEP project directors and sponsors.**

**Dorothy has been the quintessential role model for the thousands of older workers and SCSEP practitioners throughout the country who know her through her work as a Senior AIDES Program representative and trainer.**

# USING MOTIVATION AND TRAINING TO INCREASE JOB PLACEMENTS

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## ACKNOWLEDGEMENTS

# INTRODUCTION

Successful Senior Community Service Employment Program practitioners today have learned how to use motivational techniques and locally available training options to maximize enrollees' job prospects. This manual, "Using Motivation and Training to Increase Job Placements," presents some of the ideas and techniques that have worked for some successful practitioners.

## Helping SCSEP Enrollees Help Themselves

What motivates one enrollee to actively seek a job may be quite different from what motivates another. Motivation comes from a person's inner needs, desires and goals. It is an internal process, but there are ways that SCSEP project directors can tap into this process. Chapter 1, "How to Use Motivation to Increase Unsubsidized Placements," provides some practical motivational techniques. Emphasis is placed on the importance of making sure enrollees understand that the function of the SCSEP is not to provide jobs, but rather to provide the **work experience** and **training** that will prepare them for unsubsidized jobs in the public and private sectors. Enrollees who understand and accept the transitional nature of the program will be more "motivated" to put forth a serious job search effort.

Employers today are demanding that job entrants possess the abilities and skills to be immediately productive. Project directors need to know how to identify and provide the training that will enable enrollees to compete for jobs in a demanding job market. This requires networking with other employment and training providers to help enrollees take advantage of training opportunities in the community. This is particularly important in a time when public training programs in both national and local levels are undergoing major changes. Chapter 2, "How to Use Skill Training to Increase Unsubsidized Placements," presents information on some of the training options presently available and ways that these options are being used.

## Best Practices Shared at Training Conference

At its 1997 annual training conference, the National Senior Citizens Education & Research Center convened a series of eight workshops concerned with increasing unsubsidized placements. In a pre-conference questionnaire, Senior AIDES Program project directors and sponsors were asked to suggest areas in the placement process which should be included in workshop discussions and which could result in resource manuals like this one. Using their suggestions, the following eight workshops were presented at the conference:

1. Motivation
2. Job Clubs
3. The Job Developer
4. Public Relations-  
Marketing Older Workers
5. Training
6. Unsubsidized Placement in Rural Areas
7. Developing Employer Relationships
8. Job Search Courses and Individual  
Job Search

By far the most frequently picked topic was "motivation." "Training" was also a popular choice. These are the topics of this manual, which is the third in a series of three manuals designed to help SCSEP practitioners raise their unsubsidized placement rates. The first two manuals, "Using Public Relations to Market Older Workers" and "How to Help SCSEP Enrollees Find Jobs," provide information on the other six workshop topics.

## **About This Manual**

"Using Motivation and Training to Increase Job Placements" was developed from material presented at NSCERC's 1997 training conference. In the "Motivation" and "Training" workshops Senior AIDES Program sponsors and project directors from 27 states and the District of Columbia shared their personal experiences and best practices which have helped them consistently exceed SCSEP unsubsidized placement goals. This manual incorporates the practical experiences of these workshop participants.

In addition, some of the technical information in the chapter on training was derived from U.S. Department of Labor publications, particularly "Technical Assistance Guide on Training Older Workers," and "The Voice of the Customer," part of USDOL's "Simply Better!" initiative.

# 1.0 HOW TO USE MOTIVATION TO INCREASE UNSUBSIDIZED EMPLOYMENT

One of the questions most often asked in Senior Community Service Employment Program training sessions is, "How can I motivate my enrollees to look for jobs. Enrollees seem content to stay year after year in host agency assignments. What can I do to get them involved in an unsubsidized job search?" These are legitimate questions, and there are as many answers as there are individual enrollees in your projects.

## 1.1 HOW TO CREATE A MOTIVATIONAL ENVIRONMENT

**Creating an environment that encourages enrollees to take the responsibility for their own job searches begins at the time you first meet the enrollee and needs to be reinforced at each subsequent meeting. In this ongoing process, you need to reiterate the scope and purpose of the SCSEP and the transitional nature of the program.**

**YOU CAN'T  
MOTIVATE  
ANYONE BUT  
YOURSELF.**

Motivation is an internal process. I can tap into your motivation, but I can not create it in you. Motivation comes from inner needs, desires and goals, unique to each individual. As SCSEP practitioners, you can create an environment that encourages enrollees to discover their inner motivations. This environment must be created with the enrollee's first initiation to the SCSEP and repeated until the enrollee "gets it."

**THE SCSEP  
DOES NOT  
PROVIDE  
JOBS.**

It is common for enrollees to think, "I don't need a job. I have one." This program's practitioners have become so good at finding interesting host agency assignments for enrollees - assignments where they are comfortable and happy - that many enrollees are quite content to stay in the "jobs" where they have been placed.

From the first introduction to our service, enrollees need to be told that **the SCSEP provides work and training, not jobs.** The principles and goals of the program need to be made totally clear. Enrollees need to understand the transitional nature of the SCSEP and that they have the responsibility to actively look for a "real job."

The SCSEP can be pictured as a bridge over the river of age discrimination -- not a program to live on. It's a launch pad, providing experience and opportunities for growth and training.

**WHAT TO SAY IN  
YOUR FIRST  
INTERVIEW WITH  
APPLICANTS.**

Make very sure applicants know what will be expected of them. Emphasize the requirement to actively search for unsubsidized employment. Older workers usually have good work ethics. If they know what's expected of them they will try to do it. Make sure they know that you're a resource and a sounding board for them. Give them your card and make sure they know they can call you with their concerns. Let them know you see them as individuals, not just mere numbers.

One project director says that right from the beginning day she lets enrollees know that if they take an unsubsidized job and if it doesn't work out they can come back into the project. This offers some security to enrollees who are afraid of taking risks.

**IF APPLICANTS  
SAY THEY DO  
NOT WANT TO  
LOOK FOR JOBS.**

Restate the SCSEP's job search requirement. Explain that the program can only enroll a tiny percentage of qualified applicants. The more enrollees find jobs, the more deserving people can be served. Suggest that they might be better suited to volunteer programs like RSVP, Senior Companions or Foster Grandparents. Have literature on these or other local opportunities available.

**USE  
ORIENTATION  
SESSIONS TO  
REINFORCE JOB  
SEARCH  
REQUIREMENTS.**

The orientation requirements of SCSEP give project directors several opportunities to talk about unsubsidized placement goals. Enrollees are presented with so much information during initial orientation, however, that project directors may need to come up with ways to emphasize the importance of the job search requirement. To reinforce this requirement, many project directors are requiring participants to sign contracts or commitment statements when they enroll. They are also giving enrollees written copies of their unsubsidized placement policies.

**AN EXAMPLE OF AN ENROLLEE COMMITMENT REQUIREMENT**

As an enrollee in the Senior Community Service Employment Program I understand and will comply with the following requirements:

- I understand that I have an active and vigorous requirement to seek and secure unsubsidized employment during my enrollment in the program - on a daily basis.
- I will enroll/maintain enrollment with my local job service within thirty days of enrollment.
- I will participate in the services and activities of the one-stop center (if available) at least once a month.
- I will actively attend/participate in project-sponsored job search workshops, seminars, job fairs and employment network support activities.
- I will explore/identify/enroll in appropriate job skills training (resources/programs) compatible with my needs, capabilities and employment goals within ninety days of my assignment date.
- I understand and fully appreciate that 'age' is not the basis of hiring decisions by ethical employers. Instead, education, experience, maturity, skill, commitment, teamwork, positive image and enthusiasm are the real hiring factors.
- I understand that clear, realistic and practical goals, with an action plan, supportive resources, and motivated by individual effort and dedication is the only way to secure viable and meaningful employment.

**AS AN ENROLLEE, I WILL COMPLY WITH THE ABOVE STATED REQUIREMENTS TO THE BEST OF MY ABILITY.**

\_\_\_\_\_  
Enrollee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Project Director

-----  
Date



Some SCSEP projects have written policies on the enrollees' responsibilities for seeking unsubsidized employment:

## **AN EXAMPLE OF AN UNSUBSIDIZED PLACEMENT POLICY**

**(Proof of attendance for each activity must be provided to the project office.)**

- I. As an SCSEP enrollee, you must register with the state job service unless excused by the project director and must check in regularly to see what jobs are available.
- II. You must choose one or more of the following activities:
  - A. Look for a job outside of the SCSEP. On the last payday of each month you must submit a form documenting where you have sought work and what the results were. Turn it in with your time sheet. (You may count applying at your host agency.)
  - B. Start GED or High School Diploma classes at Adult Education.
  - C. Start tutoring with the local literacy classes or English as a Second Language to improve your reading or English speaking skills.
  - D. Make a significant commitment to seek and go to counseling.
  - E. Take vocational classes that will assist you in getting an unsubsidized job.
  - F. Enroll in a job club.
  - G. Engage in other activities related to your employment goal as approved by your project director.

**Not all of the above activities are covered by SCSEP wages. When you become an enrollee, you are making a commitment to seek unsubsidized employment. Concerns should be discussed with the project director. Mileage will be paid if you turn in the correct forms.**

## **1.2 HOW TO USE THE ASSESSMENT PROCESS TO PROMOTE**

## MOTIVATION

**The assessment process is also a self-discovery process. It requires enrollees to focus on where they are now, where they want to go in the future and what they need to do to get there. During the process, enrollees can uncover the needs and desires that can either be used as job search incentives, or that require being addressed before the job search process can be successful.**

### **ASSESSMENTS UNCOVER MOTIVATIONS.**

The initial assessment includes information on the skills, interests, talents, work history, physical capabilities, need for supportive services, aptitudes, occupational preferences, potential for performing SCSEP duties and potential for transition to unsubsidized employment. The assessment process should not be rushed. It takes at least thirty minutes to do an adequate interview. Assessments should be as thorough as any job application. If carefully done, the process should uncover the factors that motivate the individual being assessed.

This first assessment should reveal major barriers to employment, such as illiteracy, lack of transportation, health or family problems. These need to be fully understood and addressed by the enrollee and the project director.

Self-exploration can be supported through individual assessments and group activities during training meetings.

As the enrollee works towards finding permanent employment, other needs that must be identified, discussed and overcome may be uncovered. The interaction between project director and enrollee during the assessment process can be the first step in building a relationship based on trust and a method of identifying motivational factors.

### **FACTORS THAT MOVE PEOPLE.**

Fears push people into actions; desires pull them into action. Using fear and threats to push people into action can backfire. Always accentuate the positive.

In addition to food, shelter and clothing needs, some primary motivating factors are:

1. Financial security
2. Social affiliation
3. Desire to make a meaningful contribution
4. Recognition
5. Alleviation of dependency
6. Desire to remain functional and alive
7. Learning
8. Self direction.

It should become obvious during the assessment process which of these factors will motivate the enrollee to make an active job search. Motivation is intimately connected with a person's values and needs. This is information you need to know to help you in developing the right community service assignment and in helping individuals find and keep a job.

**THE IDP WILL  
PROVIDE MORE  
INFORMATION  
ON MOTIVATION.**

The Individual Development Plan process focuses the enrollees' attention on what they want and need in a job. Many enrollees have always taken what was offered or what was available without thinking too much about it. Many older women have never even looked for a job in the past.

**ASSESSMENT IS  
AN ONGOING  
PROCESS.**

Making realistic employment goals is not easy for anyone at any stage of life. Most people either undervalue or overvalue their employability assets. When project directors know what motivates enrollees, they can help them set employment goals.

Many enrollees haven't a clue as to what kind of jobs are available and what they entail. They need to have some idea of what their options are. Project directors need to be knowledgeable about the local job market so they can help the enrollee choose a suitable goal. The IDP is an excellent tool for helping enrollees to make difficult choices and for maintaining their focus on achieving their goals. These goals, of course, should be both practical and achievable.

People change their minds about what they want to do when they find out more information about their real needs and the requirements of specific jobs. The assessment process does not end with the completion of an IDP. The SCSEP requires that the progress made by enrollees towards meeting the IDP goals must be reviewed and documented at least once every twelve months, but project directors are encouraged to review IDPs and note the progress of enrollees as frequently as they can. Progress reviews should continue throughout the enrollee's tenure.

**ONE STEP AT A  
TIME.....**

An enrollee who enrolled in the SCSEP after her husband died was very distraught and distressed and had low self esteem. During the assessment process, she set goals for herself and the steps to attain them. She decided that her interest lay in nursing or child development and went on to earn a certificate in nurses aide training.

She was assigned to an adult day care center for one year. There she had a variety of duties, including assisting the physical therapist and helping with arts and crafts.

She was hired by the center for \$7.00 an hour for 30 hours per week. She now makes \$7.25 an hour and her hours have been raised to 35 per week. Her supervisors are so pleased with her work that they have presented her with their "Employee of the Year" award.

**WHEN THE  
ENROLLEE  
WON'T  
COOPERATE**

Those who refuse to cooperate in meeting their training or employment goals can be terminated from the SCSEP. Enrollees who refuse to accept a reasonable number of referrals or jobs offers consistent with their IDPs can be terminated. Be sure your records and documentation are adequate and accurate before doing this.

Before it comes to termination, however, it is important to find out why the enrollee is not cooperating. It may be something that can be straightened out. Arrange a private meeting with the enrollee to try to explore the cause and solution to the problem.

**ENCOURAGE-  
MENT CAN  
OVERCOME  
INERTIA**

One project director, when asked what she said when enrollees refuse to go on or sabotage interviews, said that to her knowledge she has never run into this situation. She thinks her interest and excitement in their possibilities makes them feel encouraged to share their fears and thoughts with her and they get past the refusal or sabotage.

**ANSWERING  
TOUGH  
QUESTIONS**

What do you say when an enrollee tells you that the prevailing wage in the area is the same as the SCSEP rate? This is unfortunately true in some rural areas and in some small communities in certain states. The answer is that in most cases unsubsidized jobs offer the possibility of wage increases and of working more than 20 hours. In the final analysis most

people who leave the SCSEP for jobs make more money than if they stayed in the program.

Make an analysis of the unsubsidized placements in your project. Share the information with the enrollees at a quarterly meeting.

In one project those who found unsubsidized employment in program year 1996 worked an average of 29 hrs./wk. at an average hourly rate of \$5.30, \$1.05/hr. over the then hourly minimum wage of \$4.25. This gave the job holders an average biweekly income of \$307.40 in comparison to the \$170 they could earn from SCSEP. By extra hours or an increased rate of pay, all improved their economic position by obtaining unsubsidized jobs.

In a more affluent part of the country out of 21 job placements made in the first half of the program year when the minimum wage was \$4.25/hr., the average wage was \$8.46. The lowest wage was \$5.00/hr. and the highest was \$18.20. They were employed an average of 28 hrs./wk. with six former enrollees working 40 hours, nine working 20 hours and the rest an average of 28 hrs./wk. The income of all of the former enrollees was well above what they could have made in SCSEP.

### **1.3 HOW TO USE MOTIVATIONAL TECHNIQUES**

**The project director can't always perform miracles. There are going to be people who resist efforts to help them help themselves. There are, however, many things project directors can do to keep themselves motivated and keep enrollees motivated to look for unsubsidized jobs.**

#### **TEN THINGS PROJECT DIRECTORS CAN DO**

1. Eliminate unnecessary threats; threats encourage avoidance behavior. If the necessity to find a job is clearly explained to the enrollee as a SCSEP requirement, it is no longer a threat; it's an expectation. Unclear expectations can result in a decrease of motivation. Let enrollees know what you want them to do and how they

are expected to do it.

2. Don't give rewards when they're not deserved. They'll lose their value. Dispense reinforcers as soon as possible after the desired performance.
3. Recognize accomplishments. Letters of commendation from host agency supervisors, successful completion of training, and certainly getting an unsubsidized job are the kinds of things that should be acknowledged.
4. Whenever possible, permit enrollees to make decisions that affect them. The assessment process is designed for this. When they set their own goals they are making a commitment to themselves as well as the process.
5. Individualize your supervision. To maximize motivation, people must be treated as individuals. Be genuine. Your real concern goes a long way toward helping your enrollees. Most of them have not had anyone interested in them as individuals in a long time - perhaps never.
6. Recognize and help eliminate the occupational and non-occupational barriers which keep enrollees from finding jobs. If the barrier is not recognized and removed, it will continue to prevent the enrollee from being successful in his job search efforts. Take time to think about the situation of each individual.
7. Help enrollees see how their host agency work relates to their personal goals and those of the host agency. Routine work can result in passivity and boredom.
8. Match tasks and environment to individual needs. People with different dominant needs require different working conditions. Enrollees with a high need for achievement need community service assignments where they can learn new tasks and succeed with them.
9. Establish an environment of trust and openness. Let enrollees know that they can talk to you. Motivation is highest where there is openness and trust. Handle problems and complaints before they get blown out of proportion.
10. When monitoring, point out performance improvements, no matter how small, especially when enrollees first enter the SCSEP.

Effort is the currency of motivation. If effort does not pay off, effort will be withheld. Make sure that effort pays off in results so that enrollees will not stop trying.

**HOW TO HELP  
ENROLLEES  
WITH LOW SELF  
ESTEEM.**

Self-esteem issues need to be addressed before enrollees can be successful in their job search efforts. No matter how strongly they may be motivated by the need for medical insurance or more money, if they feel unworthy of being hired,

they very probably won't be. The "Nobody would want to hire me. I'm too old," attitude is usually a self-fulfilling prophecy. Unfortunately this is an all too common attitude for older job seekers.

Success builds self esteem. Spend enough time in selecting host agency assignments to assure that the enrollees have a good chance of feeling useful and successful in the assigned work. Move them quickly out of assignments that are not right for them. They do not need any more failures in their lives. Enlist the host agency supervisor's help in building the enrollees' self esteem.

Project directors can help enrollees by:

- Working with them to identify past successes
- Providing opportunities for small successes, but not too much too soon
- Offering empowerment seminars
- Reinforcing enrollees' successes with words and rewards.

### **SOME RECOGNITION TECHNIQUES USED BY PROJECT DIRECTORS TO SPUR MOTIVATION AND SELF ESTEEM**

Recognition rewards can be on a small or large scale depending upon the circumstances. One project director puts on a large scale quarterly meeting/luncheon to celebrate the enrollees in her project. She calls them "Super Star Seniors" and uses stars for the decorations and as a theme of the celebration. She makes presentations to enrollees with special talents and skills and presents Certificates of Achievement to the enrollees who had left for unsubsidized jobs. An "Enrollee of the Year" is presented with an award and honored at the celebration.

Some other recognition techniques that can be used at quarterly meetings or other appropriate times:

1. Motivation Box: Have every enrollee write down something that motivates them on a card. Compile the ideas and share motivation ideas through the newsletter or have as a reference to share ideas when someone is feeling "slow."

2. **Publicity Releases:** Write a publicity release about the efforts of specific enrollees. People love to see their names in the paper, and it doesn't cost anything.
3. **Enrollee of the \_\_\_\_\_:** Select an enrollee of the (day, week, month, year). They can receive a letter of congratulation and their selection can be announced in your newsletter. Post the winner's picture in the office.
4. **Letter to the President:** Write up the accomplishments of the person selected as enrollee of the year and send it in a letter to the White House. The President gets thousands of letters a day, but someone there could pick out your letter to answer. Present your letter to the enrollee. If the letter is answered send a copy to the local newspaper.
5. **Notes:** A simple note can have great impact. Many people enjoy receiving praise in person, but there's something about the possession of a note to refer back to that makes it special. It's the time it takes to write and send it that makes it special.
6. **Limerick/Poem:** Write a limerick or poem to celebrate an individual or the accomplishments of a group. Include it in the newsletter.
7. **Friendship Plants:** There are a variety of plants that can be propagated very easily by simply rooting a cutting in water. Have a big plant like this in your office and give a cutting out to people who are deserving of recognition.
8. **Success Jars:** Start a success jar for enrollees to take home. At meetings write down a success they've had since your last meeting and add it to their jar. Whenever they feel stressed and wonder how to continue they can refer to the success jar to see how far they've come. Make the jars more special by adding a word of your pride in them or a note of encouragement to each entry. (A variation is to keep an envelope in each file to hold successes and transfer into a jar when they leave.)

There are many small ways to recognize achievements. Use recognition techniques to thank, encourage, appreciate, motivate and stimulate enrollees.

**DON'T DO TOO MUCH.**

You can't do it all. You can put ideas in people's minds, but they are ultimately responsible for acting on the ideas.

A case in point ... the project director in one SCSEP project suggested to an enrollee that he might think of going into business for himself. He had experience cleaning carpets and upholstery. She suggested that he should think of going back to the company he had worked for and ask for their old cleaning machines. He since has set up his own cleaning business.



Another enrollee who had been a cook all her life had a desire to be a receptionist. She was without skills or experience but the project director placed her in a host agency as a receptionist. On her own, she taught herself to type. She now has an unsubsidized office job.

Project directors can provide a jump start to enrollees. Enrollees need to take it from there.

## **SELF-FULFILLING PROPHECIES**

There's a story about a family that had twin boys. The father always said, "That boy is going to be a doctor, and that one there - I don't know what he is going to be." The one who was predicted to be a doctor is a doctor. The other one still doesn't know what he is going to be.

Just like parents and teachers, you need to be careful of projecting negative expectations onto enrollees.

People who are expected to achieve do so more frequently than those from whom little or nothing is expected.

## **STAYING MOTIVATED**

The "Don't do what I do; do what I say to do," admonition doesn't work with anyone, especially older adults. Be a role model for your enrollees by being motivated yourself -- be energetic and enthusiastic. Practice what you preach. What could be more motivating than to see enrollees get good jobs at decent wages with chances for promotion?

One of the most effective motivational practices is that of inviting former enrollees who have gotten jobs to quarterly meetings and other project functions. Enrollees can look at them and think, "I can do that." Project directors can think, "I helped change the life of that enrollee." Few jobs offer that kind of satisfaction.

## **MOTIVATIONAL ACTIONS THAT WORK**

- 1. Make sure applicants and current enrollees understand and agree to the requirement to seek unsubsidized employment.**
- 2. Take enough time in the assessment process to get to know what motivates each individual and how you can tap into this motivation.**
- 3. Be prepared to show enrollees how they'll be better off with an unsubsidized job.**
- 4. Use encouragement, support and rewards, but not too much too soon. Enrollees need to take responsibility for their job search activities.**

## **2.0 HOW TO USE SKILLS TRAINING TO INCREASE UNSUBSIDIZED PLACEMENTS**

Training to update and enhance old skills or develop new skills can be the key to improving SCSEP enrollees' competitive edge in the job market. In a time of rapid technological change, employers expect job applicants to come equipped with the skills necessary to be immediately productive. Office work today requires using computers and complicated telecommunications systems rather than typewriters and simple telephones. Other occupations have undergone similar shifts. Unless enrollees come right into the program from a modern office or shop, they will probably need some form of skills training before they will be job ready.

### **2.1 HOW TO DETERMINE TRAINING NEEDS**

**Older workers have proven that they can and will profit from learning new skills. SCSEP regulations encourage project directors to take advantage of training opportunities available in their communities or to develop their own training activities. The kind of training that will best serve individuals can be determined through the assessment process. With this process, the project director can pinpoint the skills necessary for the enrollees to be successful in their host agency assignments and in their search for unsubsidized employment.**

#### **IS TRAINING WASTED ON THE OLDER WORKER?**

There is plentiful evidence today that people can continue to learn at any age. Recent research shows that intellectual capacity does not decline with age. Negative stereotypes concerning the ability of older people to learn need to be confronted and challenged. Old sayings like, "You can't teach old dogs new tricks" for too long have been used as an excuse for not providing older adults with training opportunities. The idea that older people can't or won't learn new things is just plain wrong.

#### **TRAINING AND SCSEP REGULATIONS**

SCSEP regulations allow training of up to 500 hours per grant year when the training is consistent with the enrollee's Individual Development Plan (IDP). This training may cover all aspects of training (skills, job search, etc.). Requests for additional hours of training can be considered on a waiver

basis. Enrollees engaged in skills-related training may be reimbursed for the documented travel costs and room and board necessary to engage in the training. Training costs, including tuition, are allowable under "other enrollee costs."

The regulations encourage project directors to arrange for, or directly provide, skills training, including literacy training, beyond the program's community service training activities so that enrollees can acquire or improve skills.

Whenever possible, training should be sought at no cost from such sources as the Job Training Partnership Act (JTPA) and the Carl D. Perkins Vocational and Applied Technology Act. Where training is not available from other sources, SCSEP funds may be used. Regulations encourage co-enrollment between the SCSEP and other federal training programs.

**USE THE  
ASSESSMENTS  
PROCESS TO  
DETERMINE  
TRAINING NEEDS.**

Assessment is a tool to help enrollees analyze themselves and to help those that work with them gain an understanding of how best to help them optimize their potentials. A well-done assessment can:

1. Help enrollees determine their own interests, experience, motivations and skills.
2. Help enrollees play an active role in choosing the training and employment most appropriate for them.
3. Help enrollees understand the need for training and how it relates to their employment goals.
4. Help enrollees understand their strengths and weaknesses and ways to overcome whatever barriers to training and employment they may have.

Through the initial assessment and the IDP process, enrollees have a unique opportunity to work with the project director and the host agency supervisor to discover what they need to do to perform well in their community service assignments and to obtain the skills necessary to compete in the local job market.

## 2.2 HOW TO DETERMINE TRAINING OPTIONS

There are many viable options for providing training to enrollees. Always try for options that are available without cost to the project. You need to spend time networking and familiarizing yourselves with community resources. Building relationships with one-stop centers, Private Industry Councils (PICs), JTPAs, adult education organizations, community colleges, etc., pays off. Through these relationships, you can keep enrollees informed of opportunities to increase their skills and improve their chances for obtaining unsubsidized employment.

### TRAINING POSSIBILITIES

Training available to SCSEP enrollees consists of classroom training, on-the-job training (OJT), and the experiential training received in host agency assignments.

The two types of training most commonly used by older workers are literacy and occupational training.

### WHEN TO USE LITERACY TRAINING

People who lack basic skills are always at a disadvantage. They are even more disadvantaged in the present technological/information age. Enrollees need to address deficiencies in reading, writing or computational skills before they can benefit from most classroom training. Community schools offer adult education classes in basic skill areas. Enrollees need to be encouraged to attend these classes and to work toward completing a General Education Development (GED) degree.

Those who are not proficient in English usually are relegated to the lowest paid and least desirable jobs in our society. English as a Second Language (ESL) courses are available in most communities today. In some areas they are coordinated with skills training. SCSEP participants who need help with spoken or written English should be directed to this training.

These are delicate areas to address. People tend to be embarrassed or defensive about the flaws in their education. As project staff, you need to be sensitive to this and to be able to offer some strong reasons why it is to the enrollees' advantage to take the training. It is always helpful to be able to discuss some examples of how other enrollees' lives were

changed by improving their education.

## **OCCUPATIONAL TRAINING**

Occupational training can be used to either teach new skills or upgrade the enrollees current skills. This training should be designed around the enrollees needs and goals as determined by their skills assessments and IDPs and current local labor market requirements.

## **TRAINING ARRANGEMENTS**

After assessment, it's time to choose a way of meeting the requirements. Some options are:

- Enroll the participant in a JTPA or Section 502(e) training program.
- Arrange for the host agency to provide the enrollee with structured training.
- Enroll the participant in a community college or adult education course.
- Develop and operate an in-house training program.
- Subcontract with a vendor to design and deliver training.
- Purchase admittance for the participant in an existing training program.
- Help the participant get a student loan.
- Support the enrollee in an independent search for training outside the SCSEP environment.

## **DUAL ENROLLMENTS**

Dual enrollment (enrollment simultaneously in two publicly-funded training programs) offers employment and training entities opportunities to coordinate activities in a way that is beneficial to both parties. Written agreements are required for these co-enrollments. Those who are eligible for SCSEP services are normally automatically eligible for JTPA services. Two examples of non-financial memoranda of agreement follow.

### **MEMORANDUM OF UNDERSTANDING BETWEEN**

**NAME OF SCSEP PROJECT  
AND  
(NAME OF ONE-STOP SERVICE)**

1. **Purpose:** The purpose of this agreement is to coordinate the delivery of employment and training services to qualified persons 55 and older. Coordination benefits will include minimizing, and where possible, eliminating the duplication of employment and training services.
2. **Term:** This agreement shall be on-going. The parties of this agreement may withdraw from the agreement by giving a 30-day written notice to each of the remaining parties.
3. **Coordination of Services:** Specific areas of coordination covered under this agreement include the recruitment of eligible participants, joint enrollment, orientation to services, and the delivery of occupational/academic assessments, and special training.

The parties to this agreement will:

- ▶ Assist with the recruitment, identification, and referral of eligible participants.
- ▶ Conduct job development and placement services in cooperation with one another.
- ▶ Set up and negotiate training agreements for participants with public and private employers in accordance with Job Training Partnership Act (JTPA) guidelines.
- ▶ Provide participants with job seeking and job holding skills training.
- ▶ Provide participants with needed academic or vocational classroom training.
- ▶ Provide career assessments of participants' needs and share this information with one another.
- ▶ Provide documentation of dates and hours of JTPA training to verify attendance.

**4. Other Cooperative Arrangements**

- ▶ The (\_\_\_\_ Project) will provide the (One-Stop Center) with brochures or other material that describe project services and eligibility guidelines. These materials will be distributed and \_\_\_\_\_ discussed by (One-Stop Center) staff with clients.
- ▶ The (One-Stop Center) will provide the (\_\_\_\_ Project) with materials describing its services so that this information can be discussed with \_\_\_\_\_ Program applicants and participants.
- ▶ With the participant's consent, confidential information concerning the participant can be shared between the parties.

Both parties affirm the non-financial nature of this agreement and further agree to hold each other harmless from any and all liabilities which are implied.

\_\_\_\_\_  
(\_\_\_\_ Project)  
Date \_\_\_\_\_

\_\_\_\_\_  
(One-Stop Center)  
Date \_\_\_\_\_

**MEMORANDUM OF UNDERSTANDING  
BETWEEN  
NAME OF SCSEP PROJECT  
AND  
(NAME OF JTPA PROVIDER)**

**I. Purpose:** The purpose of this non-financial agreement is to promote cooperation and coordination of resources in the provision of employment and training services for low-income persons aged 55 and older. It is intended to maximize unsubsidized employment opportunities for persons eligible for services under the Job Training Partnership Act (JTPA) and the \_\_\_\_\_ Project.

**II. Legislative Requirement:** On December 2, 1993, HR 3161 amended the Job Training Partnership Act to extend dual eligibility provisions to include the 5% Older Worker Set-Aside Program in addition to the Title II-A Adult Program. Dual eligibility requires a written agreement between participating SCSEP projects and JTPA sponsors.

**III. Term:** This agreement shall be ongoing. Either party may terminate this agreement by giving a 30-day written notice.

**IV. Coordination of Services**

**A.** The parties agree to exchange information on the training programs and services offered by each party with sufficient lead time to facilitate appropriate referrals.

**B.** The parties agree to coordinate outreach, intake, and assessment of program participants to the extent feasible to avoid duplication of effort.

**C.** JTPA services available to \_\_\_\_\_ Project enrollees include, but are not limited to, counseling, assessment, vocational training, academic attainment, job search skills, job retention skills, job placement and post placement support, as well as support services during training.

**D.** \_\_\_\_\_ Project services available to qualifying JTPA participants include, but are not limited to, counseling, paid work experience, hands-on training, job placement, supportive services, and placement follow-up.

**E.** If it becomes necessary for one party to close intake or program operations, or if that party becomes able to resume following a period of closure, it will notify the other as promptly as possible.

**V. Administrative and Operational Procedure:** With the participant's consent, confidential information concerning the participant can be shared between the parties, if such information is helpful for determining eligibility for, participation in, or follow-up to program services. This specifically includes, but is not limited to, assessments and Individual Service Strategies/Individual Development Plans developed for training or other services.

**VI. Evaluation of Coordination Efforts:** The parties will meet not less than once each program year to discuss issue related to the implementation of this agreement.

Both parties affirm the non-financial nature of this agreement and further agree to hold each other harmless from any and all liabilities which are implied.

SIGNED AND ENTERED INTO THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ 199-

\_\_\_\_\_  
Project

\_\_\_\_\_  
JTPA Provider



**ADVANTAGES OF DUAL ENROLLMENTS**

By coordinating services, enrollees can be paid while undergoing training. This is a must for most low-income persons. Projects which provide the training while SCSEP provides the wages induce enrollees to increase the skills they need to get unsubsidized jobs.

**FINANCIAL AGREEMENTS**

The following memorandum of agreement is for classroom training services. Note that responsibilities are carefully spelled out for the grantee, subgrantee and student. The subgrant agreement provides the tuition and other costs.

**MEMORANDUM OF AGREEMENT**

This agreement between \_\_\_\_\_  
and \_\_\_\_\_  
Name of Training Vendor (Subgrantee)

\_\_\_\_\_ **Classroom Training** \_\_\_\_\_ Grantee  
Type of Training

at \_\_\_\_\_ Physical  
Location of Training Site

\_\_\_\_\_ (grantee) having entered into contract agreement  
with \_\_\_\_\_ to administer \_\_\_\_\_ for the counties  
of \_\_\_\_\_ enters into this agreement with  
\_\_\_\_\_ (subgrantee) to provide classroom training pursuant to the  
provisions, rules, and regulations of the Older Americans Act.

**1.0 Purpose**

The purpose of this agreement is to specify the responsibilities of the grantee and the subgrantee in the delivery of classroom training services to \_\_\_\_\_ participants.

**1.1 Program Description**

The subgrantee will provide occupationally specific, continuing education, and/or basic skills training to eligible SCSEP enrollees from the counties of \_\_\_\_\_.

**1.2 Grantee Responsibilities**

The grantee will be responsible for the following:

- a. Recruitment and/or referral for all participants
- b. Coordination and/or scheduling of SCSEP certification and assessment
- c. Pre-screening to determine need and provision of services
- d. Comprehensive case management to include counseling
- e. Supportive services to clients if eligible and as needed
- f. Job development

- g. Collection and submission of job placement information
- h. Follow-up services for up to 90 days
- i. Payment of costs incurred as allowed by the subgrant agreement and requested according to established procedures
- j. Policy and Instructions necessary for program operation
- k. Monitoring of subgrantee for compliance with this agreement, the act, regulations, state and/or \_\_\_\_\_ instructions

**1.3 Subgrantee Responsibilities**

The subgrantee will be responsible for the following:

- a. Completing Memorandum of Agreement, Subgrant Agreements, and Release of Information forms in a timely manner
- b. Requesting payment for participant costs as agreed upon by the grantee in a timely manner
- c. Notifying the grantee when a participant
  - 1. Drops a course, withdraws, and/or discontinues a class
  - 2. Receives academic or disciplinary action
- d. Providing grantee with a prorata billing for the amount of time the participant in item number c.1. receives training
- e. Encouraging students to use job placement services
- f. Counseling and/or advising as needed

**1.4 Student Responsibilities**

The student will be responsible for the following:

- a. Contacting a training and/or \_\_\_\_\_ representative whenever experiencing any academic problems or difficulties, etc.
- b. Keeping in constant contact with assigned advisor at training site
- c. Utilizing job placement services at training site in addition to registering with the local job services

The grantee agrees to reimburse the subgrantee for authorized tuition and book costs. If there is any change in or deviation from a student's planned curriculum without our prior approval, we will not be responsible for the payment of these courses or fees as stated in the Administrative Student Policy (see attachment). A subgrant agreement will be negotiated for each participant. No subgrant may be written to extend beyond June 30, 1997. Modification of subgrants to allow additional training may be allowed, if funds are available and the training pertains to the established curriculum for the participant.

Your institution will be reimbursed for authorized costs incurred by students who are certified participants of the \_\_\_\_\_ for the program year \_\_\_\_ through \_\_\_\_ or the completion of the course of study within this period. As a requirement of the Grant, \_\_\_\_\_ must maintain a signatory file on those persons who have been designated to sign any and all reports and approve requests for payments. Please authorize the required person(s) to sign below.

<b>RELEASE OF INFORMATION</b>
-------------------------------

\_\_\_\_\_ (Training Vendor) agrees to supply \_\_\_\_\_ with current

requested information regarding the training activities of enrolled participants. This information will be utilized by \_\_\_\_\_ and the \_\_\_\_\_ when monitoring participant and training activities.

The training vendor agrees to begin providing requested data upon receipt of a Release of Information form signed by he participant. Further, the training vendor understands that this information is mandated as a condition of continued \_\_\_\_\_ Program funding.

Approved for Subgrantee	
_____ Typed Name	_____ Title
_____ Signature	_____ Date

<b>SUBGRANT AGREEMENT</b> Classroom Training
---

**PURPOSE OF AGREEMENT**

This agreement outlines proposed training costs for \_\_\_\_\_ (Name of Participant), \_\_\_\_\_ (Social Security Number) to attend \_\_\_\_\_ (Name of Training Site) in \_\_\_\_\_ curriculum as a full-time student to begin \_\_\_\_\_ and end approximately \_\_\_\_\_. Reimbursement procedures and services by the subgrantee are detailed in the Memorandum of Agreement between the Grantee and \_\_\_\_\_ dated \_\_\_\_\_. Items not covered by this grant agreement or written amendment are ineligible for reimbursement.

The Grantee will reimburse \_\_\_\_\_ (Subgrantee) for costs incurred within the budget outlined below upon receipt of an approved invoice.

<u>BUDGET</u>	<u>Per Semester</u> <u>(or Quarters)</u>	<u># Semesters</u> <u>(or Quarters)</u>	<u>Total</u>
<b>A. Participant Training Costs</b>			
1. Tuition	\$ _____	_____	\$ _____
2. Books	\$ _____	_____	\$ _____
3. Other (Itemized Below)	\$ _____	_____	\$ _____
<u>Course Supplies Only</u>			
_____			
_____			
<b>Total Authorized Participant Training Costs for Program Year</b>			<b>\$ _____</b>

above is the maximum allowable training cost for this participant for program year in most cases the cost may be less. Adjustments will be made upon receipt of invoices. Should training costs exceed he maximum allowable, a written amendment to this subgrant agreement will be executed.

**PERIOD OF AGREEMENT:** From: \_\_\_\_\_ to: \_\_\_\_\_

**Student Responsibilities**

The student will be responsible for the following:

- a. Contacting a ( \_\_\_\_\_ )representative whenever experiencing any academic problems or difficulties.
- b. Keeping in constant contact with assigned advisor at training site.
- c. Utilizing job placement services at training site in addition to registering with the local job services.

Approved by Participant

\_\_\_\_\_  
Participant's Signature

\_\_\_\_\_  
Date

Approved for Grantee

Approved for Subgrantee

\_\_\_\_\_  
Typed Name

\_\_\_\_\_  
Typed Name

\_\_\_\_\_  
Program Director  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

### 2.3 PUBLIC TRAINING RESOURCES

As of the summer of 1997, new legislation affecting federal training programs is still under consideration by Congress. Proposed job training reform bills in both the House and the Senate would consolidate most existing federal job training into block grants and would merge the present programs into broad categories, eliminating, for example, the set-aside for older workers. JTPA adult employment and training programs are expected to be supplanted with a single program for all adults, including disadvantaged and dislocated workers.

#### FOR MORE ON PROPOSED CHANGES

The National Association of Private Industry Councils (NAPIC) has published an introductory guide to proposed job training consolidation and a review of existing legislation. Entitled, "Consolidation of Federal Job Training Programs," it is available from NAPIC; 1201 New York Ave., NW; Suite 350; Washington, DC 20005.

**THE JTPA**

Currently SCSEP enrollees can access training under JTPA's 5% Older Workers Program or the Title II-A Adult Training Programs which provide training services to low income adults over 21. Dislocated workers of any age can obtain training under Title III of the Act.

**THE PERKINS ACT**

The Carl D. Perkins Vocational and Applied Technology Act of 1990 funds vocational education in high schools and community colleges. Older workers are eligible for services under this Act.

**THE WAGNER-PEYSER ACT**

The Wagner-Peyser Act established the Employment Service (ES) and Unemployment Insurance (UI) systems. The Employment Service's mission is to function as a labor exchange for employers and job seekers, matching applicants with available jobs. ES offices are responsible for the development of state and local market information, including unemployment statistics, occupational employment statistics, and estimates of employment by industry.

**THE VOCATIONAL REHABILITATION ACT**

Through this Act, states can offer people with disabilities a wide range of job employment services, including general and vocational education, on-the-job training, assessment and placement services.

**THE HIGHER EDUCATION ACT**

This Act supports higher education and authorizes student loans and the PELL Grants for low and moderate income students. These are both available to older workers who want to pursue education opportunities outside the SCSEP-specific offerings.

**PUBLIC OR NONPROFIT TRAINING PROVIDERS**

**Community colleges or state universities** - These institutions offer certificate training programs or single courses. The American Association of Community Colleges (AACA) has completed a survey of courses and programs offered by community colleges across

the country. This data base can be accessed through the Department of Labor's Training Technology Resource Center, 1-800-488-0901.

**Service Delivery Areas (SDAs)** - There are 640 SDAs across the U.S. which are responsible for the operation of the adult portion of JTPA. They often contract with other local organizations -- community colleges, one-stop centers and community-based organizations -- to provide training. They are a good source of information on local resources.

**Public School Systems** - Many local and regional public schools offer basic adult education and vocational education for adults.

**Community-Based Organizations** - Many community agencies offer training. The State Department of Employment and Training or SDA will have a list of these organizations.

For-profit or proprietary training organizations are also found in many communities. Each area will be different. The better your relations are within the employment and training network, the easier it will be to locate training opportunities in your community.

#### **RESEARCH THE FUNDING RESOURCES**

Money for training can come from various sources within the community. Most localities offer access to JTPA services. Every SCSEP project can use budgeted training funds and can offer experimental private sector training projects under 502 (e) of the Older Americans Act. In some communities Small Cities Block Grants are available in partnership with area Community Development Corporations. Some community colleges waive tuition for persons sixty and over. Many host agencies allow enrollees to take the same training offered to their employees. This training, especially when used to update computer skills, enhances productivity at the workplace and increases the enrollees chances of finding unsubsidized employment.

## **2.4 HOW TO USE TRAINING RESOURCES**

**With a written agreement, all applicants eligible for the Senior Community Service Employment Program are automatically eligible for JTPA services. This means that SCSEP enrollees can access free training while being paid SCSEP wages. Enrollees can also use other services offered by JTPA. In some areas, project directors design training using JTPA services.**

**USING JTPA AND OTHER TRAINING PROGRAMS**

SCSEP projects differ in their structures and have differing relationships with JTPA providers. Some SCSEP projects are also JTPA providers; some have close working relationships with JTPA providers; some do not interact at all.

**EXAMPLES OF HOW SOME SCSEP PROJECTS INTERACT WITH JTPA**

**Where the SCSEP Provider Is Also the JTPA Provider** - In one project, all SCSEP applicants begin with a three-day, twelve hour JTPA orientation and assessment. At this time, all applicants are informed of available services and tested for academic levels. Their eligibility is then determined. The JTPA intake specialist determines all eligibility, collects all necessary documents, then forwards the applicant to the appropriate counselor. In this location, all JTPA counselors interact with each other to inform the entire office of available employment opportunities. All employees constantly update computer data on available job orders, starting wages, contact person, skills desired, etc. All co-workers are active members of various local employment and training committees.

JTPA has provided the funding for various types of training for enrollees including computer training, two- and four-year college degree programs, specialized career training and typewriter and keyboard training. It has also assisted with many supportive services, JTPA has purchased hearing aids, equipment, tools and uniforms for enrollees.

**Where the SCSEP Provider Uses JTPA Services** - Currently and historically, project directors have used JTPA 5% set-aside funds to provide training for low-income persons 55 years or older. These funds have been more accessible than those under Title II-A which provides services to low-income persons over the age of 21 and Title III funds for dislocated workers. Creative use of JTPA funding through co-enrollment can open up a wide use of training opportunities for enrollees.

You can access these opportunities by becoming actively involved with other employment and training professionals and organizations. Becoming familiar with the availability of community resources requires taking the time and making the effort to get to know the local JTPA staff and arranging periodic meetings to discuss mutual concerns and services.

JTPA providers differ by location. You need to establish relationships with one-stop centers, private industry councils, community colleges or a wide range of profit and nonprofit agencies, depending upon the community. The training, of course, needs to be tailored to the enrollees' needs as related to their IDPs and the local job market. Some training that has helped enrollees throughout the U.S. find jobs:

- |                                     |                           |
|-------------------------------------|---------------------------|
| Introduction to Computers           | Home Health Care          |
| Intermediate and Advanced Computers | Early Childhood Education |
| Adult Day Care                      | Medical Technology        |

General Office Procedures  
General Repair

Geriatric Homemaking  
Electrical Repair

JTPA training has also helped enrollees obtain the skills needed to start their own small business ventures by offering courses in marketing, financial management, time management, financing, one-on-one counseling and workshops with successful entrepreneurs.

**Where the Project Director Uses No JTPA Training** - In some communities where JTPA training is not accessible or JTPA funds are diminishing, project directors have to find other training opportunities. In some rural areas, for example, providers are not geographically convenient and transportation services are inadequate. There are a variety of reasons that may require project directors to develop training services for enrollees without using JTPA services.

### **AN EXAMPLE OF A TRAINING PROGRAM USING OTHER THAN JTPA RESOURCES**

**One project director designed the following programs to provide training without using JTPA funds. Enrollees are paid SCSEP wages while training; training is paid for out of the project's budgeted training funds.**

**Basic Skills Training:** The project director advises persons who have not finished high school to enroll in GED classes, especially if they wish to work in child or adult day care. The particular state where the project is located requires workers in these fields to have a high school diploma. If they do not enroll, they have no chance of getting caregiver jobs.

**Computer Skills Training:** If enrollees wish to upgrade their keyboarding/computer skills, the project director refers them through the Adult Education Department of the local school system for semester long classes or through a community college for eight-week sessions. Courses through the community college cost more than the adult education classes.

**Developing New Courses:** The project director has contacted the Adult Education Department of a local vocational technical college to develop courses to benefit enrollees with hands-on learning of office machine skills, phone operation, receptionist duties, light bookkeeping, and child care development courses. She has also contacted a nonprofit agency which promotes educational classes for older adults in the community to develop a class in job search skills.

**Intergenerational Training:** The project director also contacted the director of curriculum in the local school system about training and hiring SCSEP enrollees as



paraprofessionals with 36 district schools to work as teachers' aides, tutors and lunchroom monitors. They will assist with phones, in the library and media rooms, act as greeters, and provide assistance with child care, maintenance and security. Ten enrollees are now assigned to six schools and are gaining training and experience in area schools.

**Combination Supervisor/Enrollee Meetings:** These meetings are held annually. Last year the project director offered a combined meeting with a professional instructor from a local university. A five and one-half hour session was held on the campus of the university on the subject of "customer service." The training this year will be only two hours long and will be conducted by a trainer from the local vocational college. It will be on goal setting, self esteem, attitude, motivation, humor in the work place and the changing job market.

The project director also has a resource library in her office with books and videos that enrollees can take home, review in the office or review in their host agencies (which is considered training at the agencies).

**USING SECTION  
502(e) OF THE  
OLDER  
AMERICANS ACT**

Many project directors find the experimental private sector training [ Section 502(e)] to be beneficial to their enrollees. In some cases the majority of the project's unsubsidized placements have occurred as a direct result of this training.

Section 502(e) concerns a pool of SCSEP funds that is targeted specifically for training older persons for unsubsidized employment in the private sector. This section of the Older Americans Act mandates that these training projects should emphasize second career opportunities and training for placement in growth industries or jobs needing new technological skills. The funds may also be used for training for jobs that experiment with new types of work modes, such as flex time, job sharing, including jobs with reduced physical exertion. National SCSEP grantees must distribute 502(e) funds in accordance with the state allocation in their grant.

502(e) participants must meet the same age, income and resident requirements as those required for enrollees in the Senior Community Service Employment Program.

**Differences Between SCSEP Training and 502(e) Training**

**SCSEP Training**

**502(e) Training**

Has a 500-hour training limitation

Has no limit on training hours.

Can not pay for training in the private

Pays for training in the private sector.

sector.

Pre-assignment and additional training is designed to enhance performance in host agency assignments, build self-esteem or improve the general marketability of enrollees. For example, an introduction to computers course for 15 enrollees should be done through an SCSEP budget.

502(e) funds are designed to give capable, job-ready individuals the specific knowledge or credentials needed to be hired for actual jobs in their communities. A 502(e) training course might include Lotus or Peach Tree Accounting for three persons with bookkeeping backgrounds and basic computer skills who want bookkeeping jobs.

## **Some Ways of Using 502(e) Funds**

On-the-job training is training provided by a private for-profit or private nonprofit employer where 502(e) funds are used to reimburse the employer for 50 percent of the wages paid to the trainee for a specified period of time. The employer pays all FICA and fringe benefits. The trainee becomes an employer's employee at the start of the training.

Work experience is training provided by a private for-profit employer where all the wages and fringe benefits of the trainee for a specified period of time are paid by 502(e) funds. The trainee does not become an employee until after the training period.

Classroom training (general) includes educational courses that teach skills in demand in today's economy but does not result in licensure or certificates of accreditation.

Classroom training (occupational) includes courses of study that result in accreditation for a particular job (nurses aide, commercial driver, paralegal, child care aide) where certification is required.

Job club/job search is employment search training including resume writing and interviewing where job-ready individuals learn how to approach employers and use community resources to locate job openings. This is usually done in combination with one of the trainings discussed above.

Transitional services are support services provided to unemployed persons to help them transition to the workplace. These services may include counseling, motivational training, assessment and job development services.

In one national contractor's experience, the most common use of these funds has been for on-the-job training in private businesses, occupational classroom training and practicums. Less common uses include work experience, job development and job search, counseling and other transitional services in places where the services were not available elsewhere in the community. The best results occur when combinations of training types are used.

502(e) funds may be used to pay tuition, participant wages, instructor/counselor costs, mileage, book/material fees, uniforms and other costs related to training. JTPA can cover the cost of assessment and job development while 502(e) funds cover on-the-job training.

## **HOW TO ORGANIZE A 502(e) PROJECT**

Proposals for 502(e) funds and proposed budgets are submitted at the end of the annual grant proposal for approval by the U.S. Department of Labor. Some of the actions you can take in preparation for your request for funding and after USDOL approval are:

1. Talk to your enrollees. Find out what they want to learn to increase their chances of being hired.
2. Talk to community employers. Determine the types of skills they want in new employees. In the most successful 502(e) projects, project directors have received hiring commitments (even written agreements) from the employer before the training begins.
3. Locate training resources and find out if they are offering the training you want.
4. If training is being offered, arrange for enrollees to participate. If training is not being offered explore options to establish a curriculum for your enrollees.
5. Call the 502(e) coordinator to discuss ideas and the availability of funds.
6. Write a proposal and submit it with a proposed budget.
7. Begin training activities after receiving a 502(e) authorization.
8. Monitor progress of 502(e) participants.
9. Prepare Quarterly Progress Reports.

To the extent feasible, projects funded under Section 502(e) should be coordinated with projects under JTPA II-A.

## **2.5 HOW TO MEASURE CUSTOMER SATISFACTION**

Customer satisfaction is measured by your customers' standards, whether or not their standards make sense to you. The U.S. Department of Labor's *Simply Better!* project is an initiative of employment and training professionals and agencies committed to continuously improving the quality of their services and their performance by uncovering and acting on what satisfies their primary customers - job seekers and employers. As part of this technical assistance project, the USDOL is producing six publications to help employment and training program professionals improve their services. *The Voice of the Customer* offers practical help in measuring satisfaction with employment and training programs.

**WHAT IS  
CUSTOMER  
SATISFACTION?**

Customer satisfaction is the degree to which your training meets or exceeds the expectations of the individual training participants and employers with whom you interact. Some expectations include:

- Availability of service
- Responsiveness of service
- Timeliness of service
- Comprehensiveness of service
- Pleasantness of service
- Reliability of service
- Overall satisfaction with service.

What really determines satisfaction is the customer's perceived value of the services rendered.

**USING  
THE VOICE  
OF THE  
CUSTOMER**

This publication will help project directors understand the importance of customer satisfaction. It suggests ways to reach customers and gather their opinions and ways to translate customers' opinions into operational improvements by using research techniques. *The Voice of the Customer* contains an appendix that lists other sources of information about customer satisfaction, focus groups, surveying and data analysis. It includes copies of survey instruments used by the employment and training community.

To order the publications or learn more about the services, call

**WHERE TO GET  
SIMPLY BETTER!  
PUBLICATIONS**

the regional office of the Employment and Training Administration and ask to speak with the ***Simply Better!*** representative or call:

■ William Janes, ETA Seattle Regional Office,  
206-553-7700

■ Barry Bridge, ETA Philadelphia Regional Office,  
215-596-6353, or

■ Ric Larisch, ETA National Office,  
202-219-5229.

The ***Simply Better! Continuous Improvement Project*** is a response to the nation's move toward a more customer-focused and quality-oriented approach to the delivery of services.

# ACKNOWLEDGEMENTS

This resource manual resulted from the Motivation and Training Workshops at the National Senior Citizens Education & Research Center's 1997 Annual Senior AIDES Project Directors Training Conference held in Orlando, Florida on January 7-10. These two workshops were part of eight conference workshops on successful strategies for obtaining unsubsidized placements.

The conference planning committee was chaired by Dorinda Fox, deputy director of the Senior AIDES Program. Senior AIDES staff serving on the committee were: Senior Program Representative E. Joan Kirk; Regional Program Representatives/Information Specialists Emily Reid and Theresa Reynolds; Regional Program Representative/Health Insurance Specialist Jodi Imel; and Regional Program Representative Craig Morant.

Dorothy Thomas, regional program representative and trainer, was the coordinator for the eight unsubsidized placement workshops. Senior AIDES Program Deputy Director Dorinda Fox facilitated the Motivations Workshop; Regional Program Representative Celeste Felsberg facilitated the Training Workshop.

Presentations at the Motivation Workshop were made by Senior AIDES Project Directors Vera Mitchell, St. Louis, MO; Amy Forst, Wausau, WI; and Dewey Graham, Wilmington, NC. Presenters at the Training Workshop were Senior AIDES Project Directors Jackie Boynton, South Bend, IN and Dave Fish, Ashtabula, O.

Recorders were: Dorothea Gross, Senior AIDES Program consultant (Motivation) and Senior AIDES Project Directors Dorene Lewis, Galveston, TX and Tracie Patterson, Milwaukee, WI (Training).

Others who participated in the workshops and contributed to their success were:

## MOTIVATION WORKSHOP

Allen, Kathryn; US Forest Service  
Amaral, Ernest; Bridgeport, CT  
Andrews, Curt; Dayton, OH  
Bunting, Patricia; Salisbury, MD  
Burns, Robert; Bristol, MA  
Colson, Eartha; Austin, TX  
Daniels, Clara; Denver, CO  
Doran, Rochelle; Pueblo, CO  
Falls, Sara; Evansville, IN  
Fisher, Charles, Jr.; Towson, MD  
Fredericks, Ronald; Kenosha, WI

## TRAINING WORKSHOP

Adrian, Raymond; Miami, FL  
Boynton, Jackie; South Bend, IN  
Clegg, Sofia; Hayward, CA  
Dailey, Maryanne; Charlotte, NC  
Dodd, Victor; Chicago, IL  
Fish, Dave; Ashtabula, OH  
Gerken, Richard; Chattanooga, TN  
Kelley, William; Turner Falls, MA  
Larish, Ric; USDOL  
Lee, Charlotte; Springfield, MA  
Lewis, Dorene; Galveston, TX

Forst, Amy; Wausau, WI  
Graham, Dewey; Wilmington, NC  
Hampton, Gwen; Fayetteville, NC  
Jackson, Raymond; Ft. Myers, FL  
Krevolin, Daniel; New Haven, CT  
Langevin, June; Warwick, RI  
Mack, Jayrene; Jensen Beach, FL  
Maki, Margaret; Minneapolis, MN  
McKoy, Maryeileen; Allegheny Co, Pa  
Mitchell, Vera; St. Louis, MO  
Moore, Caryll; Daytona Beach, FL  
Nunez, Javier; Oxnard, CA  
Parker, Gloria; Jefferson Co., AL  
Silva, Angela; El Centro. CA  
Stearns, Carolyn; Memphis, TN  
Strickland, Bettye; Tallahassee, FL  
Turner, Carol; Duluth, MN

Lockwood, Harryette; Danbury, CT  
Luna, Maritza; Perth Amboy. NY  
Lyons, Betty; Gary, IN  
McGarry, John; Flint, MI  
Mulligan, Thomas; Ft. Lauderdale, FL  
Mullin, Helen; Ft. Lauderdale, FL  
Patterson, Tracie; Milwaukee, WI  
Peterson, Ruth; Washington, DC  
Rotella, Kenneth; Providence, RI  
White, Linda; San Diego, CA

The manual was written by Dorothea Gross, Senior AIDES Program consultant.

# ACKNOWLEDGEMENTS

This resource manual resulted from the Motivation and Training Workshops at the National Senior Citizens Education & Research Center's 1997 Annual Senior AIDES Project Directors Training Conference held in Orlando, Florida on January 7-10. These two workshops were part of eight conference workshops on successful strategies for obtaining unsubsidized placements.

The conference planning committee was chaired by Dorinda Fox, deputy director of the Senior AIDES Program. Senior AIDES staff serving on the committee were: Senior Program Representative E. Joan Kirk; Regional Program Representatives/Information Specialists Emily Reid and Theresa Reynolds; Regional Program Representative/Health Insurance Specialist Jodi Imel; and Regional Program Representative Craig Morant.

Dorothy Thomas, regional program representative and trainer, was the coordinator for the eight unsubsidized placement workshops. Senior AIDES Program Deputy Director Dorinda Fox facilitated the Motivations Workshop; Regional Program Representative Celeste Felsberg facilitated the Training Workshop.

Presentations at the Motivation Workshop were made by Senior AIDES Project Directors Vera Mitchell, St. Louis, MO; Amy Forst, Wausau, WI; and Dewey Graham, Wilmington, NC. Presenters at the Training Workshop were Senior AIDES Project Directors Jackie Boynton, South Bend, IN and Dave Fish, Ashtabula, O.

Recorders were: Dorothea Gross, Senior AIDES Program consultant (Motivation) and Senior AIDES Project Directors Dorene Lewis, Galveston, TX and Tracie Patterson, Milwaukee, WI (Training).

Others who participated in the workshops and contributed to their success were:

## MOTIVATION WORKSHOP

Allen, Kathryn; US Forest Service  
Amaral, Ernest; Bridgeport, CT  
Andrews, Curt; Dayton, OH  
Bunting, Patricia; Salisbury, MD  
Burns, Robert; Bristol, MA  
Colson, Eartha; Austin, TX  
Daniels, Clara; Denver, CO  
Doran, Rochelle; Pueblo, CO  
Falls, Sara; Evansville, IN  
Fisher, Charles, Jr.; Towson, MD  
Fredericks, Ronald; Kenosha, WI

## TRAINING WORKSHOP

Adrian, Raymond; Miami, FL  
Boynton, Jackie; South Bend, IN  
Clegg, Sofia; Hayward, CA  
Dailey, Maryanne; Charlotte, NC  
Dodd, Victor; Chicago, IL  
Fish, Dave; Ashtabula, OH  
Gerken, Richard; Chattanooga, TN  
Kelley, William; Turner Falls, MA  
Larish, Ric; USDOL  
Lee, Charlotte; Springfield, MA  
Lewis, Dorene; Galveston, TX



Forst, Amy; Wausau, WI  
Graham, Dewey; Wilmington, NC  
Hampton, Gwen; Fayetteville, NC  
Jackson, Raymond; Ft. Myers, FL  
Krevolin, Daniel; New Haven, CT  
Langevin, June; Warwick, RI  
Mack, Jayrene; Jensen Beach, FL  
Maki, Margaret; Minneapolis, MN  
McKoy, Maryeileen; Allegheny Co, Pa  
Mitchell, Vera; St. Louis, MO  
Moore, Caryll; Daytona Beach, FL  
Nunez, Javier; Oxnard, CA  
Parker, Gloria; Jefferson Co., AL  
Silva, Angela; El Centro. CA  
Stearns, Carolyn; Memphis, TN  
Strickland, Bettye; Tallahassee, FL  
Turner, Carol; Duluth, MN

Lockwood, Harryette; Danbury, CT  
Luna, Maritza; Perth Amboy. NY  
Lyons, Betty; Gary, IN  
McGarry, John; Flint, MI  
Mulligan, Thomas; Ft. Lauderdale, FL  
Mullin, Helen; Ft. Lauderdale, FL  
Patterson, Tracie; Milwaukee, WI  
Peterson, Ruth; Washington, DC  
Rotella, Kenneth; Providence, RI  
White, Linda; San Diego, CA

The manual was written by Dorothea Gross, Senior AIDES Program consultant.

## **2.0 HOW TO USE SKILLS TRAINING TO INCREASE UNSUBSIDIZED PLACEMENTS**

Training to update and enhance old skills or develop new skills can be the key to improving SCSEP enrollees' competitive edge in the job market. In a time of rapid technological change, employers expect job applicants to come equipped with the skills necessary to be immediately productive. Office work today requires using computers and complicated telecommunications systems rather than typewriters and simple telephones. Other occupations have undergone similar shifts. Unless enrollees come right into the program from a modern office or shop, they will probably need some form of skills training before they will be job ready.

### **2.1 HOW TO DETERMINE TRAINING NEEDS**

**Older workers have proven that they can and will profit from learning new skills. SCSEP regulations encourage project directors to take advantage of training opportunities available in their communities or to develop their own training activities. The kind of training that will best serve individuals can be determined through the assessment process. With this process, the project director can pinpoint the skills necessary for the enrollees to be successful in their host agency assignments and in their search for unsubsidized employment.**

#### **IS TRAINING WASTED ON THE OLDER WORKER?**

There is plentiful evidence today that people can continue to learn at any age. Recent research shows that intellectual capacity does not decline with age. Negative stereotypes concerning the ability of older people to learn need to be confronted and challenged. Old sayings like, "You can't teach old dogs new tricks" for too long have been used as an excuse for not providing older adults with training opportunities. The idea that older people can't or won't learn new things is just plain wrong.

#### **TRAINING AND SCSEP REGULATIONS**

SCSEP regulations allow training of up to 500 hours per grant year when the training is consistent with the enrollee's Individual Development Plan (IDP). This training may cover all aspects of training (skills, job search, etc.). Requests for additional hours of training can be considered on a waiver

basis. Enrollees engaged in skills-related training may be reimbursed for the documented travel costs and room and board necessary to engage in the training. Training costs, including tuition, are allowable under "other enrollee costs."

The regulations encourage project directors to arrange for, or directly provide, skills training, including literacy training, beyond the program's community service training activities so that enrollees can acquire or improve skills.

Whenever possible, training should be sought at no cost from such sources as the Job Training Partnership Act (JTPA) and the Carl D. Perkins Vocational and Applied Technology Act. Where training is not available from other sources, SCSEP funds may be used. Regulations encourage co-enrollment between the SCSEP and other federal training programs.

**USE THE  
ASSESSMENTS  
PROCESS TO  
DETERMINE  
TRAINING NEEDS.**

Assessment is a tool to help enrollees analyze themselves and to help those that work with them gain an understanding of how best to help them optimize their potentials. A well-done assessment can:

1. Help enrollees determine their own interests, experience, motivations and skills.
2. Help enrollees play an active role in choosing the training and employment most appropriate for them.
3. Help enrollees understand the need for training and how it relates to their employment goals.
4. Help enrollees understand their strengths and weaknesses and ways to overcome whatever barriers to training and employment they may have.

Through the initial assessment and the IDP process, enrollees have a unique opportunity to work with the project director and the host agency supervisor to discover what they need to do to perform well in their community service assignments and to obtain the skills necessary to compete in the local job market.

## 2.2 HOW TO DETERMINE TRAINING OPTIONS

There are many viable options for providing training to enrollees. Always try for options that are available without cost to the project. You need to spend time networking and familiarizing yourselves with community resources. Building relationships with one-stop centers, Private Industry Councils (PICs), JTPAs, adult education organizations, community colleges, etc., pays off. Through these relationships, you can keep enrollees informed of opportunities to increase their skills and improve their chances for obtaining unsubsidized employment.

### TRAINING POSSIBILITIES

Training available to SCSEP enrollees consists of classroom training, on-the-job training (OJT), and the experiential training received in host agency assignments.

The two types of training most commonly used by older workers are literacy and occupational training.

### WHEN TO USE LITERACY TRAINING

People who lack basic skills are always at a disadvantage. They are even more disadvantaged in the present technological/information age. Enrollees need to address deficiencies in reading, writing or computational skills before they can benefit from most classroom training. Community schools offer adult education classes in basic skill areas. Enrollees need to be encouraged to attend these classes and to work toward completing a General Education Development (GED) degree.

Those who are not proficient in English usually are relegated to the lowest paid and least desirable jobs in our society. English as a Second Language (ESL) courses are available in most communities today. In some areas they are coordinated with skills training. SCSEP participants who need help with spoken or written English should be directed to this training.

These are delicate areas to address. People tend to be embarrassed or defensive about the flaws in their education. As project staff, you need to be sensitive to this and to be able to offer some strong reasons why it is to the enrollees' advantage to take the training. It is always helpful to be able to discuss some examples of how other enrollees' lives were

changed by improving their education.

## **OCCUPATIONAL TRAINING**

Occupational training can be used to either teach new skills or upgrade the enrollees current skills. This training should be designed around the enrollees needs and goals as determined by their skills assessments and IDPs and current local labor market requirements.

## **TRAINING ARRANGEMENTS**

After assessment, it's time to choose a way of meeting the requirements. Some options are:

- Enroll the participant in a JTPA or Section 502(e) training program.
- Arrange for the host agency to provide the enrollee with structured training.
- Enroll the participant in a community college or adult education course.
- Develop and operate an in-house training program.
- Subcontract with a vendor to design and deliver training.
- Purchase admittance for the participant in an existing training program.
- Help the participant get a student loan.
- Support the enrollee in an independent search for training outside the SCSEP environment.

## **DUAL ENROLLMENTS**

Dual enrollment (enrollment simultaneously in two publicly-funded training programs) offers employment and training entities opportunities to coordinate activities in a way that is beneficial to both parties. Written agreements are required for these co-enrollments. Those who are eligible for SCSEP services are normally automatically eligible for JTPA services. Two examples of non-financial memoranda of agreement follow.

### **MEMORANDUM OF UNDERSTANDING BETWEEN**

**NAME OF SCSEP PROJECT  
AND  
(NAME OF ONE-STOP SERVICE)**

1. **Purpose:** The purpose of this agreement is to coordinate the delivery of employment and training services to qualified persons 55 and older. Coordination benefits will include minimizing, and where possible, eliminating the duplication of employment and training services.
2. **Term:** This agreement shall be on-going. The parties of this agreement may withdraw from the agreement by giving a 30-day written notice to each of the remaining parties.
3. **Coordination of Services:** Specific areas of coordination covered under this agreement include the recruitment of eligible participants, joint enrollment, orientation to services, and the delivery of occupational/academic assessments, and special training.

The parties to this agreement will:

- ▶ Assist with the recruitment, identification, and referral of eligible participants.
- ▶ Conduct job development and placement services in cooperation with one another.
- ▶ Set up and negotiate training agreements for participants with public and private employers in accordance with Job Training Partnership Act (JTPA) guidelines.
- ▶ Provide participants with job seeking and job holding skills training.
- ▶ Provide participants with needed academic or vocational classroom training.
- ▶ Provide career assessments of participants' needs and share this information with one another.
- ▶ Provide documentation of dates and hours of JTPA training to verify attendance.

**4. Other Cooperative Arrangements**

- ▶ The (\_\_\_\_ Project) will provide the (One-Stop Center) with brochures or other material that describe project services and eligibility guidelines. These materials will be distributed and \_\_\_\_\_ discussed by (One-Stop Center) staff with clients.
- ▶ The (One-Stop Center) will provide the (\_\_\_\_ Project) with materials describing its services so that this information can be discussed with \_\_\_\_\_ Program applicants and participants.
- ▶ With the participant's consent, confidential information concerning the participant can be shared between the parties.

Both parties affirm the non-financial nature of this agreement and further agree to hold each other harmless from any and all liabilities which are implied.

\_\_\_\_\_  
(\_\_\_\_ Project)  
Date \_\_\_\_\_

\_\_\_\_\_  
(One-Stop Center)  
Date \_\_\_\_\_

**MEMORANDUM OF UNDERSTANDING  
BETWEEN  
NAME OF SCSEP PROJECT  
AND  
(NAME OF JTPA PROVIDER)**

**I. Purpose:** The purpose of this non-financial agreement is to promote cooperation and coordination of resources in the provision of employment and training services for low-income persons aged 55 and older. It is intended to maximize unsubsidized employment opportunities for persons eligible for services under the Job Training Partnership Act (JTPA) and the \_\_\_\_\_ Project.

**II. Legislative Requirement:** On December 2, 1993, HR 3161 amended the Job Training Partnership Act to extend dual eligibility provisions to include the 5% Older Worker Set-Aside Program in addition to the Title II-A Adult Program. Dual eligibility requires a written agreement between participating SCSEP projects and JTPA sponsors.

**III. Term:** This agreement shall be ongoing. Either party may terminate this agreement by giving a 30-day written notice.

**IV. Coordination of Services**

**A.** The parties agree to exchange information on the training programs and services offered by each party with sufficient lead time to facilitate appropriate referrals.

**B.** The parties agree to coordinate outreach, intake, and assessment of program participants to the extent feasible to avoid duplication of effort.

**C.** JTPA services available to \_\_\_\_\_ Project enrollees include, but are not limited to, counseling, assessment, vocational training, academic attainment, job search skills, job retention skills, job placement and post placement support, as well as support services during training.

**D.** \_\_\_\_\_ Project services available to qualifying JTPA participants include, but are not limited to, counseling, paid work experience, hands-on training, job placement, supportive services, and placement follow-up.

**E.** If it becomes necessary for one party to close intake or program operations, or if that party becomes able to resume following a period of closure, it will notify the other as promptly as possible.

**V. Administrative and Operational Procedure:** With the participant's consent, confidential information concerning the participant can be shared between the parties, if such information is helpful for determining eligibility for, participation in, or follow-up to program services. This specifically includes, but is not limited to, assessments and Individual Service Strategies/Individual Development Plans developed for training or other services.

**VI. Evaluation of Coordination Efforts:** The parties will meet not less than once each program year to discuss issue related to the implementation of this agreement.

Both parties affirm the non-financial nature of this agreement and further agree to hold each other harmless from any and all liabilities which are implied.

SIGNED AND ENTERED INTO THIS \_\_\_\_\_ DAY OF \_\_\_\_\_ 199-

\_\_\_\_\_  
Project

\_\_\_\_\_  
JTPA Provider

**ADVANTAGES OF DUAL ENROLLMENTS**

By coordinating services, enrollees can be paid while undergoing training. This is a must for most low-income persons. Projects which provide the training while SCSEP provides the wages induce enrollees to increase the skills they need to get unsubsidized jobs.

**FINANCIAL AGREEMENTS**

The following memorandum of agreement is for classroom training services. Note that responsibilities are carefully spelled out for the grantee, subgrantee and student. The subgrant agreement provides the tuition and other costs.

**MEMORANDUM OF AGREEMENT**

This agreement between \_\_\_\_\_  
and \_\_\_\_\_  
Name of Training Vendor (Subgrantee) \_\_\_\_\_  
\_\_\_\_\_ **Classroom Training** \_\_\_\_\_ Grantee  
Type of Training

at \_\_\_\_\_ Physical  
Location of Training Site

\_\_\_\_\_ (grantee) having entered into contract agreement  
with \_\_\_\_\_ to administer \_\_\_\_\_ for the counties  
of \_\_\_\_\_ enters into this agreement with  
\_\_\_\_\_ (subgrantee) to provide classroom training pursuant to the  
provisions, rules, and regulations of the Older Americans Act.

**1.0 Purpose**

The purpose of this agreement is to specify the responsibilities of the grantee and the subgrantee in the delivery of classroom training services to \_\_\_\_\_ participants.

**1.1 Program Description**

The subgrantee will provide occupationally specific, continuing education, and/or basic skills training to eligible SCSEP enrollees from the counties of \_\_\_\_\_.

**1.2 Grantee Responsibilities**

The grantee will be responsible for the following:

- a. Recruitment and/or referral for all participants
- b. Coordination and/or scheduling of SCSEP certification and assessment
- c. Pre-screening to determine need and provision of services
- d. Comprehensive case management to include counseling
- e. Supportive services to clients if eligible and as needed
- f. Job development



- g. Collection and submission of job placement information
- h. Follow-up services for up to 90 days
- i. Payment of costs incurred as allowed by the subgrant agreement and requested according to established procedures
- j. Policy and Instructions necessary for program operation
- k. Monitoring of subgrantee for compliance with this agreement, the act, regulations, state and/or \_\_\_\_\_ instructions

**1.3 Subgrantee Responsibilities**

The subgrantee will be responsible for the following:

- a. Completing Memorandum of Agreement, Subgrant Agreements, and Release of Information forms in a timely manner
- b. Requesting payment for participant costs as agreed upon by the grantee in a timely manner
- c. Notifying the grantee when a participant
  - 1. Drops a course, withdraws, and/or discontinues a class
  - 2. Receives academic or disciplinary action
- d. Providing grantee with a prorata billing for the amount of time the participant in item number c.1. receives training
- e. Encouraging students to use job placement services
- f. Counseling and/or advising as needed

**1.4 Student Responsibilities**

The student will be responsible for the following:

- a. Contacting a training and/or \_\_\_\_\_ representative whenever experiencing any academic problems or difficulties, etc.
- b. Keeping in constant contact with assigned advisor at training site
- c. Utilizing job placement services at training site in addition to registering with the local job services

The grantee agrees to reimburse the subgrantee for authorized tuition and book costs. If there is any change in or deviation from a student's planned curriculum without our prior approval, we will not be responsible for the payment of these courses or fees as stated in the Administrative Student Policy (see attachment). A subgrant agreement will be negotiated for each participant. No subgrant may be written to extend beyond June 30, 1997. Modification of subgrants to allow additional training may be allowed, if funds are available and the training pertains to the established curriculum for the participant.

Your institution will be reimbursed for authorized costs incurred by students who are certified participants of the \_\_\_\_\_ for the program year \_\_\_\_ through \_\_\_\_ or the completion of the course of study within this period. As a requirement of the Grant, \_\_\_\_\_ must maintain a signatory file on those persons who have been designated to sign any and all reports and approve requests for payments. Please authorize the required person(s) to sign below.

**RELEASE OF INFORMATION**

\_\_\_\_\_ (Training Vendor) agrees to supply \_\_\_\_\_ with current

requested information regarding the training activities of enrolled participants. This information will be utilized by \_\_\_\_\_ and the \_\_\_\_\_ when monitoring participant and training activities.

The training vendor agrees to begin providing requested data upon receipt of a Release of Information form signed by he participant. Further, the training vendor understands that this information is mandated as a condition of continued \_\_\_\_\_ Program funding.

Approved for Subgrantee	
Typed Name	Title
Signature	Date

<b>SUBGRANT AGREEMENT</b> Classroom Training
---

**PURPOSE OF AGREEMENT**

This agreement outlines proposed training costs for \_\_\_\_\_ (Name of Participant), \_\_\_\_\_ (Social Security Number) to attend \_\_\_\_\_ (Name of Training Site) in \_\_\_\_\_ curriculum as a full-time student to begin \_\_\_\_\_ and end approximately \_\_\_\_\_. Reimbursement procedures and services by the subgrantee are detailed in the Memorandum of Agreement between the Grantee and \_\_\_\_\_ dated \_\_\_\_\_. Items not covered by this grant agreement or written amendment are ineligible for reimbursement.

The Grantee will reimburse \_\_\_\_\_ (Subgrantee) for costs incurred within the budget outlined below upon receipt of an approved invoice.

<u>BUDGET</u>	<u>Per Semester</u> <u>(or Quarters)</u>	<u># Semesters</u> <u>(or Quarters)</u>	<u>Total</u>
<b>A. Participant Training Costs</b>			
1. Tuition	\$ _____	_____	\$ _____
2. Books	\$ _____	_____	\$ _____
3. Other (Itemized Below)	\$ _____	_____	\$ _____
<u>Course Supplies Only</u>			
_____			
_____			
<b>Total Authorized Participant Training Costs for Program Year</b>			<b>\$ _____</b>

above is the maximum allowable training cost for this participant for program year \_\_\_\_\_ in most cases the cost may be less. Adjustments will be made upon receipt of invoices. Should training costs exceed he maximum allowable, a written amendment to this subgrant agreement will be executed.

**PERIOD OF AGREEMENT:** From: \_\_\_\_\_ to: \_\_\_\_\_

**Student Responsibilities**

The student will be responsible for the following:

- a. Contacting a ( \_\_\_\_\_ ) representative whenever experiencing any academic problems or difficulties.
- b. Keeping in constant contact with assigned advisor at training site.
- c. Utilizing job placement services at training site in addition to registering with the local job services.

Approved by Participant

\_\_\_\_\_  
Participant's Signature

\_\_\_\_\_  
Date

Approved for Grantee

Approved for Subgrantee

\_\_\_\_\_  
Typed Name

\_\_\_\_\_  
Typed Name

\_\_\_\_\_  
Program Director  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

### 2.3 PUBLIC TRAINING RESOURCES

As of the summer of 1997, new legislation affecting federal training programs is still under consideration by Congress. Proposed job training reform bills in both the House and the Senate would consolidate most existing federal job training into block grants and would merge the present programs into broad categories, eliminating, for example, the set-aside for older workers. JTPA adult employment and training programs are expected to be supplanted with a single program for all adults, including disadvantaged and dislocated workers.

#### FOR MORE ON PROPOSED CHANGES

The National Association of Private Industry Councils (NAPIC) has published an introductory guide to proposed job training consolidation and a review of existing legislation. Entitled, "Consolidation of Federal Job Training Programs," it is available from NAPIC; 1201 New York Ave., NW; Suite 350; Washington, DC 20005.

## **THE JTPA**

Currently SCSEP enrollees can access training under JTPA's 5% Older Workers Program or the Title II-A Adult Training Programs which provide training services to low income adults over 21. Dislocated workers of any age can obtain training under Title III of the Act.

## **THE PERKINS ACT**

The Carl D. Perkins Vocational and Applied Technology Act of 1990 funds vocational education in high schools and community colleges. Older workers are eligible for services under this Act.

## **THE WAGNER-PEYSER ACT**

The Wagner-Peyser Act established the Employment Service (ES) and Unemployment Insurance (UI) systems. The Employment Service's mission is to function as a labor exchange for employers and job seekers, matching applicants with available jobs. ES offices are responsible for the development of state and local market information, including unemployment statistics, occupational employment statistics, and estimates of employment by industry.

## **THE VOCATIONAL REHABILITATION ACT**

Through this Act, states can offer people with disabilities a wide range of job employment services, including general and vocational education, on-the-job training, assessment and placement services.

## **THE HIGHER EDUCATION ACT**

This Act supports higher education and authorizes student loans and the PELL Grants for low and moderate income students. These are both available to older workers who want to pursue education opportunities outside the SCSEP-specific offerings.

## **PUBLIC OR NONPROFIT TRAINING PROVIDERS**

**Community colleges or state universities** - These institutions offer certificate training programs or single courses. The American Association of Community Colleges (AACA) has completed a survey of courses and programs offered by community colleges across

the country. This data base can be accessed through the Department of Labor's Training Technology Resource Center, 1-800-488-0901.

**Service Delivery Areas (SDAs)** - There are 640 SDAs across the U.S. which are responsible for the operation of the adult portion of JTPA. They often contract with other local organizations -- community colleges, one-stop centers and community-based organizations -- to provide training. They are a good source of information on local resources.

**Public School Systems** - Many local and regional public schools offer basic adult education and vocational education for adults.

**Community-Based Organizations** - Many community agencies offer training. The State Department of Employment and Training or SDA will have a list of these organizations.

For-profit or proprietary training organizations are also found in many communities. Each area will be different. The better your relations are within the employment and training network, the easier it will be to locate training opportunities in your community.

#### **RESEARCH THE FUNDING RESOURCES**

Money for training can come from various sources within the community. Most localities offer access to JTPA services. Every SCSEP project can use budgeted training funds and can offer experimental private sector training projects under 502 (e) of the Older Americans Act. In some communities Small Cities Block Grants are available in partnership with area Community Development Corporations. Some community colleges waive tuition for persons sixty and over. Many host agencies allow enrollees to take the same training offered to their employees. This training, especially when used to update computer skills, enhances productivity at the workplace and increases the enrollees chances of finding unsubsidized employment.

## **2.4 HOW TO USE TRAINING RESOURCES**

**With a written agreement, all applicants eligible for the Senior Community Service Employment Program are automatically eligible for JTPA services. This means that SCSEP enrollees can access free training while being paid SCSEP wages. Enrollees can also use other services**

**offered by JTPA. In some areas, project directors design training using JTPA services.**

**USING JTPA AND OTHER TRAINING PROGRAMS**

SCSEP projects differ in their structures and have differing relationships with JTPA providers. Some SCSEP projects are also JTPA providers; some have close working relationships with JTPA providers; some do not interact at all.

**EXAMPLES OF HOW SOME SCSEP PROJECTS INTERACT WITH JTPA**

**Where the SCSEP Provider Is Also the JTPA Provider** - In one project, all SCSEP applicants begin with a three-day, twelve hour JTPA orientation and assessment. At this time, all applicants are informed of available services and tested for academic levels. Their eligibility is then determined. The JTPA intake specialist determines all eligibility, collects all necessary documents, then forwards the applicant to the appropriate counselor. In this location, all JTPA counselors interact with each other to inform the entire office of available employment opportunities. All employees constantly update computer data on available job orders, starting wages, contact person, skills desired, etc. All co-workers are active members of various local employment and training committees.

JTPA has provided the funding for various types of training for enrollees including computer training, two- and four-year college degree programs, specialized career training and typewriter and keyboard training. It has also assisted with many supportive services, JTPA has purchased hearing aids, equipment, tools and uniforms for enrollees.

**Where the SCSEP Provider Uses JTPA Services** - Currently and historically, project directors have used JTPA 5% set-aside funds to provide training for low-income persons 55 years or older. These funds have been more accessible than those under Title II-A which provides services to low-income persons over the age of 21 and Title III funds for dislocated workers. Creative use of JTPA funding through co-enrollment can open up a wide use of training opportunities for enrollees.

You can access these opportunities by becoming actively involved with other employment and training professionals and organizations. Becoming familiar with the availability of community resources requires taking the time and making the effort to get to know the local JTPA staff and arranging periodic meetings to discuss mutual concerns and services.

JTPA providers differ by location. You need to establish relationships with one-stop centers, private industry councils, community colleges or a wide range of profit and nonprofit agencies, depending upon the community. The training, of course, needs to be tailored to the enrollees' needs as related to their IDPs and the local job market. Some training that has helped enrollees throughout the U.S. find jobs:

Introduction to Computers	Home Health Care
Intermediate and Advanced Computers	Early Childhood Education
Adult Day Care	Medical Technology
General Office Procedures	Geriatric Homemaking
General Repair	Electrical Repair

JTPA training has also helped enrollees obtain the skills needed to start their own small business ventures by offering courses in marketing, financial management, time management, financing, one-on-one counseling and workshops with successful entrepreneurs.

**Where the Project Director Uses No JTPA Training** - In some communities where JTPA training is not accessible or JTPA funds are diminishing, project directors have to find other training opportunities. In some rural areas, for example, providers are not geographically convenient and transportation services are inadequate. There are a variety of reasons that may require project directors to develop training services for enrollees without using JTPA services.

### **AN EXAMPLE OF A TRAINING PROGRAM USING OTHER THAN JTPA RESOURCES**

**One project director designed the following programs to provide training without using JTPA funds. Enrollees are paid SCSEP wages while training; training is paid for out of the project's budgeted training funds.**

**Basic Skills Training:** The project director advises persons who have not finished high school to enroll in GED classes, especially if they wish to work in child or adult day care. The particular state where the project is located requires workers in these fields to have a high school diploma. If they do not enroll, they have no chance of getting caregiver jobs.

**Computer Skills Training:** If enrollees wish to upgrade their keyboarding/computer skills, the project director refers them through the Adult Education Department of the local school system for semester long classes or through a community college for eight-week sessions. Courses through the community college cost more than the adult education classes.

**Developing New Courses:** The project director has contacted the Adult Education Department of a local vocational technical college to develop courses to benefit enrollees with hands-on learning of office machine skills, phone operation, receptionist duties, light bookkeeping, and child care development courses. She has also contacted a nonprofit agency which promotes educational classes for older adults in the community to develop a class in job search skills.

**Intergenerational Training:** The project director also contacted the director of curriculum in the local school system about training and hiring SCSEP enrollees as paraprofessionals with 36 district schools to work as teachers' aides, tutors and lunchroom monitors. They will assist with phones, in the library and media rooms, act as greeters, and provide assistance with child care, maintenance and security. Ten enrollees are now assigned to six schools and are gaining training and experience in area schools.

**Combination Supervisor/Enrollee Meetings:** These meetings are held annually. Last year the project director offered a combined meeting with a professional instructor from a local university. A five and one-half hour session was held on the campus of the university on the subject of "customer service." The training this year will be only two hours long and will be conducted by a trainer from the local vocational college. It will be on goal setting, self esteem, attitude, motivation, humor in the work place and the changing job market.

The project director also has a resource library in her office with books and videos that enrollees can take home, review in the office or review in their host agencies (which is considered training at the agencies).

**USING SECTION  
502(e) OF THE  
OLDER  
AMERICANS ACT**

Many project directors find the experimental private sector training [ Section 502(e)] to be beneficial to their enrollees. In some cases the majority of the project's unsubsidized placements have occurred as a direct result of this training.

Section 502(e) concerns a pool of SCSEP funds that is targeted specifically for training older persons for unsubsidized employment in the private sector. This section of the Older Americans Act mandates that these training projects should emphasize second career opportunities and training for placement in growth industries or jobs needing new technological skills. The funds may also be used for training for jobs that experiment with new types of work modes, such as flex time, job sharing, including jobs with reduced physical exertion. National SCSEP grantees must distribute 502(e) funds in accordance with the state allocation in their grant.

502(e) participants must meet the same age, income and resident requirements as those required for enrollees in the Senior Community Service Employment Program.

**Differences Between SCSEP Training and 502(e) Training**

**SCSEP Training**

Has a 500-hour training limitation

**502(e) Training**

Has no limit on training hours.



Can not pay for training in the private sector.

Pays for training in the private sector.

Pre-assignment and additional training is designed to enhance performance in host agency assignments, build self-esteem or improve the general marketability of enrollees. For example, an introduction to computers course for 15 enrollees should be done through an SCSEP budget.

502(e) funds are designed to give capable, job-ready individuals the specific knowledge or credentials needed to be hired for actual jobs in their communities. A 502(e) training course might include Lotus or Peach Tree Accounting for three persons with bookkeeping backgrounds and basic computer skills who want bookkeeping jobs.

## **Some Ways of Using 502(e) Funds**

On-the-job training is training provided by a private for-profit or private nonprofit employer where 502(e) funds are used to reimburse the employer for 50 percent of the wages paid to the trainee for a specified period of time. The employer pays all FICA and fringe benefits. The trainee becomes an employer's employee at the start of the training.

Work experience is training provided by a private for-profit employer where all the wages and fringe benefits of the trainee for a specified period of time are paid by 502(e) funds. The trainee does not become an employee until after the training period.

Classroom training (general) includes educational courses that teach skills in demand in today's economy but does not result in licensure or certificates of accreditation.

Classroom training (occupational) includes courses of study that result in accreditation for a particular job (nurses aide, commercial driver, paralegal, child care aide) where certification is required.

Job club/job search is employment search training including resume writing and interviewing where job-ready individuals learn how to approach employers and use community resources to locate job openings. This is usually done in combination with one of the trainings discussed above.

Transitional services are support services provided to unemployed persons to help them transition to the workplace. These services may include counseling, motivational training, assessment and job development services.

In one national contractor's experience, the most common use of these funds has been for on-the-job training in private businesses, occupational classroom training and practicums. Less common uses include work experience, job development and job search, counseling and other transitional services in places where the services were not available elsewhere

in the community. The best results occur when combinations of training types are used.

502(e) funds may be used to pay tuition, participant wages, instructor/counselor costs, mileage, book/material fees, uniforms and other costs related to training. JTPA can cover the cost of assessment and job development while 502(e) funds cover on-the-job training.

### **HOW TO ORGANIZE A 502(e) PROJECT**

Proposals for 502(e) funds and proposed budgets are submitted at the end of the annual grant proposal for approval by the U.S. Department of Labor. Some of the actions you can take in preparation for your request for funding and after USDOL approval are:

1. Talk to your enrollees. Find out what they want to learn to increase their chances of being hired.
2. Talk to community employers. Determine the types of skills they want in new employees. In the most successful 502(e) projects, project directors have received hiring commitments (even written agreements) from the employer before the training begins.
3. Locate training resources and find out if they are offering the training you want.
4. If training is being offered, arrange for enrollees to participate. If training is not being offered explore options to establish a curriculum for your enrollees.
5. Call the 502(e) coordinator to discuss ideas and the availability of funds.
6. Write a proposal and submit it with a proposed budget.
7. Begin training activities after receiving a 502(e) authorization.
8. Monitor progress of 502(e) participants.
9. Prepare Quarterly Progress Reports.

To the extent feasible, projects funded under Section 502(e) should be coordinated with projects under JTPA II-A.

## 2.5 HOW TO MEASURE CUSTOMER SATISFACTION

Customer satisfaction is measured by your customers' standards, whether or not their standards make sense to you. The U.S. Department of Labor's *Simply Better!* project is an initiative of employment and training professionals and agencies committed to continuously improving the quality of their services and their performance by uncovering and acting on what satisfies their primary customers - job seekers and employers. As part of this technical assistance project, the USDOL is producing six publications to help employment and training program professionals improve their services. *The Voice of the Customer* offers practical help in measuring satisfaction with employment and training programs.

### WHAT IS CUSTOMER SATISFACTION?

Customer satisfaction is the degree to which your training meets or exceeds the expectations of the individual training participants and employers with whom you interact. Some expectations include:

- Availability of service
- Responsiveness of service
- Timeliness of service
- Comprehensiveness of service
- Pleasantness of service
- Reliability of service
- Overall satisfaction with service.

What really determines satisfaction is the customer's perceived value of the services rendered.

### USING THE VOICE OF THE CUSTOMER

This publication will help project directors understand the importance of customer satisfaction. It suggests ways to reach customers and gather their opinions and ways to translate customers' opinions into operational improvements by using research techniques. *The Voice of the Customer* contains an appendix that lists other sources of information about customer satisfaction, focus groups, surveying and data analysis. It includes copies of survey instruments used by the employment and training community.

**WHERE TO GET  
SIMPLY BETTER!  
PUBLICATIONS**

To order the publications or learn more about the services, call the regional office of the Employment and Training Administration and ask to speak with the ***Simply Better!*** representative or call:

- William Janes, ETA Seattle Regional Office,  
206-553-7700
- Barry Bridge, ETA Philadelphia Regional Office,  
215-596-6353, or
- Ric Larisch, ETA National Office,  
202-219-5229.

The ***Simply Better! Continuous Improvement Project*** is a response to the nation's move toward a more customer-focused and quality-oriented approach to the delivery of services.

# ACKNOWLEDGEMENTS

This resource manual resulted from the Motivation and Training Workshops at the National Senior Citizens Education & Research Center's 1997 Annual Senior AIDES Project Directors Training Conference held in Orlando, Florida on January 7-10. These two workshops were part of eight conference workshops on successful strategies for obtaining unsubsidized placements.

The conference planning committee was chaired by Dorinda Fox, deputy director of the Senior AIDES Program. Senior AIDES staff serving on the committee were: Senior Program Representative E. Joan Kirk; Regional Program Representatives/Information Specialists Emily Reid and Theresa Reynolds; Regional Program Representative/Health Insurance Specialist Jodi Imel; and Regional Program Representative Craig Morant.

Dorothy Thomas, regional program representative and trainer, was the coordinator for the eight unsubsidized placement workshops. Senior AIDES Program Deputy Director Dorinda Fox facilitated the Motivations Workshop; Regional Program Representative Celeste Felsberg facilitated the Training Workshop.

Presentations at the Motivation Workshop were made by Senior AIDES Project Directors Vera Mitchell, St. Louis, MO; Amy Forst, Wausau, WI; and Dewey Graham, Wilmington, NC. Presenters at the Training Workshop were Senior AIDES Project Directors Jackie Boynton, South Bend, IN and Dave Fish, Ashtabula, O.

Recorders were: Dorothea Gross, Senior AIDES Program consultant (Motivation) and Senior AIDES Project Directors Dorene Lewis, Galveston, TX and Tracie Patterson, Milwaukee, WI (Training).

Others who participated in the workshops and contributed to their success were:

## MOTIVATION WORKSHOP

Allen, Kathryn; US Forest Service  
Amaral, Ernest; Bridgeport, CT  
Andrews, Curt; Dayton, OH  
Bunting, Patricia; Salisbury, MD  
Burns, Robert; Bristol, MA  
Colson, Eartha; Austin, TX  
Daniels, Clara; Denver, CO  
Doran, Rochelle; Pueblo, CO  
Falls, Sara; Evansville, IN  
Fisher, Charles, Jr.; Towson, MD  
Fredericks, Ronald; Kenosha, WI

## TRAINING WORKSHOP

Adrian, Raymond; Miami, FL  
Boynton, Jackie; South Bend, IN  
Clegg, Sofia; Hayward, CA  
Dailey, Maryanne; Charlotte, NC  
Dodd, Victor; Chicago, IL  
Fish, Dave; Ashtabula, OH  
Gerken, Richard; Chattanooga, TN  
Kelley, William; Turner Falls, MA  
Larish, Ric; USDOL  
Lee, Charlotte; Springfield, MA  
Lewis, Dorene; Galveston, TX

Forst, Amy; Wausau, WI  
Graham, Dewey; Wilmington, NC  
Hampton, Gwen; Fayetteville, NC  
Jackson, Raymond; Ft. Myers, FL  
Krevolin, Daniel; New Haven, CT  
Langevin, June; Warwick, RI  
Mack, Jayrene; Jensen Beach, FL  
Maki, Margaret; Minneapolis, MN  
McKoy, Maryeileen; Allegheny Co, Pa  
Mitchell, Vera; St. Louis, MO  
Moore, Caryll; Daytona Beach, FL  
Nunez, Javier; Oxnard, CA  
Parker, Gloria; Jefferson Co., AL  
Silva, Angela; El Centro. CA  
Stearns, Carolyn; Memphis, TN  
Strickland, Bettye; Tallahassee, FL  
Turner, Carol; Duluth, MN

Lockwood, Harryette; Danbury, CT  
Luna, Maritza; Perth Amboy. NY  
Lyons, Betty; Gary, IN  
McGarry, John; Flint, MI  
Mulligan, Thomas; Ft. Lauderdale, FL  
Mullin, Helen; Ft. Lauderdale, FL  
Patterson, Tracie; Milwaukee, WI  
Peterson, Ruth; Washington, DC  
Rotella, Kenneth; Providence, RI  
White, Linda; San Diego, CA

The manual was written by Dorothea Gross, Senior AIDES Program consultant.

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Mack, Jayrene; Jensen Beach, FL  
Maki, Margaret; Minneapolis, MN  
McKoy, Maryeileen; Allegheny Co, Pa  
Mitchell, Vera; St. Louis, MO  
Moore, Caryll; Daytona Beach, FL  
Nunez, Javier; Oxnard, CA  
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