

Working Toward Greater Prosperity in North Carolina: Effective Employment Strategies



Center for Child & Family Policy
Duke University

**Working Toward Greater Prosperity in North Carolina:
*Effective Employment Strategies***

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Background and Purpose

North Carolina Family Impact Seminars (NCFIS) convene annual seminars, publish briefing reports and facilitate follow-up activities on a topic of current interest to state policymakers. Each year, topic selection is guided by legislators and legislative staff based on their concerns and those of their colleagues and constituents, as well as their knowledge of what is likely to be addressed during current and future legislative sessions. NCFIS seminars, reports and activities are designed specifically for state policymakers from North Carolina, including legislators and legislative staff, the governor and executive branch staff, and state agency representatives.

The seminars provide objective, nonpartisan, solution-based research on the selected topic with an emphasis on how related policies and practices impact children and families. With materials made publicly available following each seminar, the reach of NCFIS extends to a wide range of organizations and individuals who are working on the topic in North Carolina and beyond.

Through NCFIS, research, information and insights related to policy, practice and programs are presented in two ways:

- By experts who present and interact with stakeholders at the seminars; and
- Through publication of briefing materials produced for the seminar.

NCFIS opens the door for ongoing engagement and interaction among stakeholders from diverse sectors and perspectives. These include the legislators and experts who speak at the seminars; researchers, faculty and staff of Duke University's Center for Child and Family Policy, which houses and convenes NCFIS; and a broad range of stakeholders concerned about each seminar issue. The stakeholder groups include members of the executive branch, directors of state and local government agencies, leaders of nonprofit agencies, and researchers and scholars from Duke and other institutions of higher education. The Center for Child and Family Policy disseminates the briefing materials widely and makes them available on the Center's Web site.

Considering Impact on Families

Family Impact Seminars encourage policymakers to consider what effects a proposed policy or program will have on families in the same way that they assess the economic and environmental impacts of proposed policies. Will it help or hurt? Will it strengthen or weaken families' circumstances?

The 2012 seminar focus – Effective Employment Strategies for Greater Prosperity in North Carolina – is a timely and critical topic for families for multiple reasons, including:

- The connection between unemployment and poverty is well documented and particularly affects North Carolina's rural population;
- The unemployment rate in North Carolina is among the highest in the country;
- The poverty rate in North Carolina, especially among children, is rising;
- The effects of unemployment, underemployment and poverty negatively impact families in North Carolina which in turn negatively impact the state's economic prosperity overall; and
- There are evidence-based employment strategies working in North Carolina and around the country that may be replicated or modified to reduce the unemployment rate.

Every day, policymakers make decisions based on information gathered from diverse sources. Family Impact Seminars strive to make the decision-making process grounded in nonpartisan, objective research and in policy options that take *family impact* into account.

Executive Summary

This report, *Working Toward Greater Prosperity in North Carolina: Effective Employment Strategies*, was prepared for distribution at the 2012 North Carolina Family Impact Seminar. It focuses on evidence-based job programs and policies from around the country that have successfully created employment opportunities. By examining job programs and policies that have a proven track record of success, policymakers can then help to implement and support similarly effective programs that can put North Carolinians back to work and help alleviate poverty in North Carolina.

In addition to the detailed descriptions of several evidence-based job programs, this briefing report provides an overview of the current state of unemployment and poverty in North Carolina, and looks carefully at how families are being impacted by poverty and job loss.

Unemployment in North Carolina

While the unemployment rate in North Carolina has been declining for the past few months, it is still among the highest in the United States – about 1.5 percentage points higher than the national average. Ironically, as a result of the recent “improvement” in the unemployment rate, North Carolina is no longer eligible to receive assistance from the federal Extended Benefits program, thereby cutting off extended unemployment benefits to the long-term unemployed. An estimated 17,000 out-of-work North Carolinians will lose their long-term unemployment benefits this month (May 2012). Long-term unemployment has a devastating impact on families. Especially troubling is recent research showing that employers are reluctant to hire workers who have been out of the work force for an extended period of time. North Carolina’s high unemployment rate, coupled with an increase in long-term unemployment, has resulted in the highest poverty rate in decades. Losing access to unemployment benefits may push more families into poverty.

The number of manufacturing jobs in North Carolina has decreased in recent years, eliminating many of the jobs that have traditionally provided employment to generations of North Carolina workers. While there has been some job growth in parts of North Carolina, these new jobs often require a set of skills different from those needed for jobs that have left the state. Research shows that available workers often lack the specific skills needed by many employers since training and education programs have not always been able to keep pace and train enough workers to fill the newly created jobs.

Why Focus on Jobs to Alleviate Poverty?

Only a robust job market that creates good jobs can raise household incomes well above the poverty threshold. A continued increase in poverty would lead to more educational failure; more child abuse; and more health and mental health problems. Increasing poverty will also lead to greater participation in safety net programs such as Medicaid, Food Stamps and food banks, putting a greater burden on local, state and federal resources. Increasing household income through better employment opportunities can help alleviate these conditions.

Championing evidence-based job programs and policies that are proven to work is a good first step to building prosperity for North Carolina.

Possible Solutions

The 2012 Family Impact Seminar has chosen to highlight several evidence-based job programs and policies:

- Manufacturing Partnerships;
- Career Academies;
- Sectoral Training and Employment; and
- Early Childhood Education.

This report also provides:

- Recent and historical data and maps pertaining to unemployment and poverty in North Carolina;
- Examples of evidence-based job programs in North Carolina and around the country;
- Evidence of the effects of unemployment and poverty on families and children;
- An overview of other states' legislation addressing unemployment and poverty;
- References to reports and academic articles related to the above topics.

The report includes the following briefs:

Brief 1 describes the current state of unemployment and poverty in North Carolina, mapping current and historical unemployment and poverty data.

Brief 2 summarizes a study examining how and why people move into and out of poverty in 13 communities across North Carolina, identifying key factors that lead to these changes.

Brief 3 highlights the effects of unemployment on family member's mental health, school performance and college enrollment, and discusses ways employers can help.

Brief 4 discusses several successful job creation programs from around the country, several of which are being utilized in North Carolina.

Enhancing and complementing the briefs are eight appendices. They include:

- An overview of North Carolina's Industrial Extension Service;
- An in-depth description of the Welfare Reform Liaison Project in Guilford County, North Carolina;
- An explanation of the federal definition of poverty;
- A list of other states' recent legislative work on unemployment and poverty reduction;
- A list of organizational resources related to employment and poverty;
- A glossary and list of acronyms relevant to employment and poverty topics; and
- A bibliography providing a list of research-based articles related to poverty alleviation and to the evidence-based employment strategies discussed in the seminar.

Brief 1

The State of North Carolina: Jobs, Poverty and Family

Jeannine Sato, Center for Child and Family Policy

The connection among jobs, poverty and family well-being is well established. Research shows that the majority of families rely on employment earnings for income. Therefore, as unemployment rises, so does poverty. This brief describes the historical, as well as current, conditions of employment and poverty in North Carolina, and where the intersection between unemployment and poverty lies. If we can better understand poverty trends and barriers to employment, we will be better equipped to find ways to reduce poverty.

North Carolina's History of Unemployment and Poverty

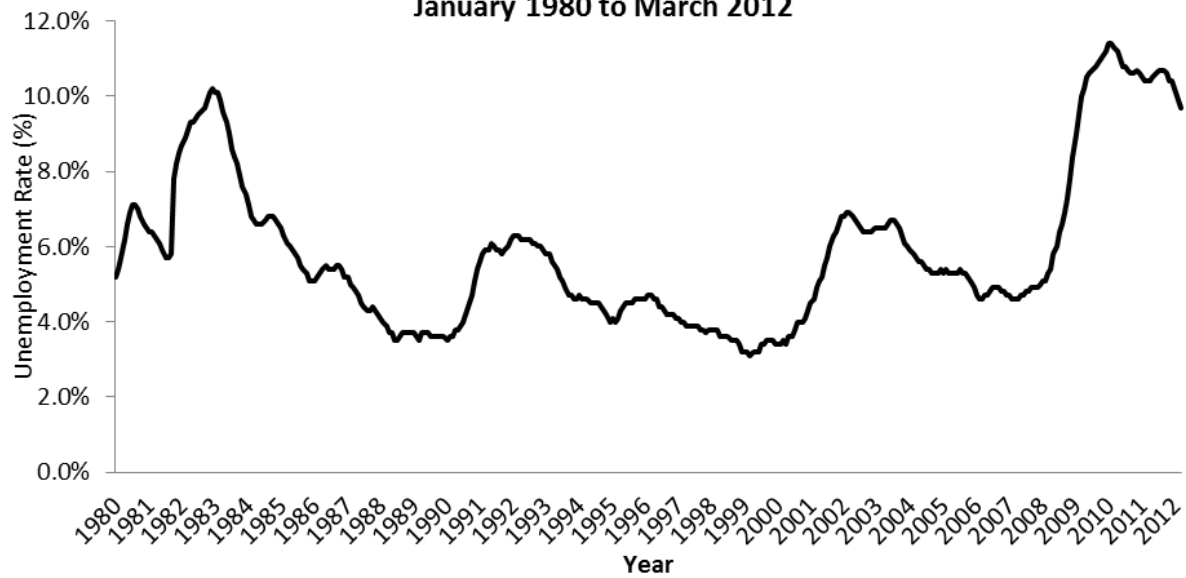
In 2012, North Carolina's economy has many strengths, but it faces many challenges. New opportunities in manufacturing are burgeoning. Farming exports are strong. The population is growing and housing is more stable than in many other states. However, the economic recession that began in 2007 has tested the state budget, stretched federal financial safety nets and destabilized family economic security. More troubling is the fact that unemployment remains high in North Carolina. The unemployment rate reached 11 percent in 2010. In March 2012, the rate stood at 9.7 percent, the fifth highest unemployment rate in the country. The good news is that unemployment in North Carolina has seen a significant drop in the first quarter of 2012.ⁱ The seasonally adjusted national average for March 2012 was 8.2 percent.

Historically, North Carolina's unemployment has followed the national trends of economic growth and contraction. Still, the rates have fluctuated wildly since the 1980s. At around 3 percent, the unemployment rate was low in 2000. It jumped to nearly 8 percent between 2002-2004, only to lower again and level off to about 5 percent until 2008, when the recent economic crisis led to a very rapid doubling of the unemployment rate.

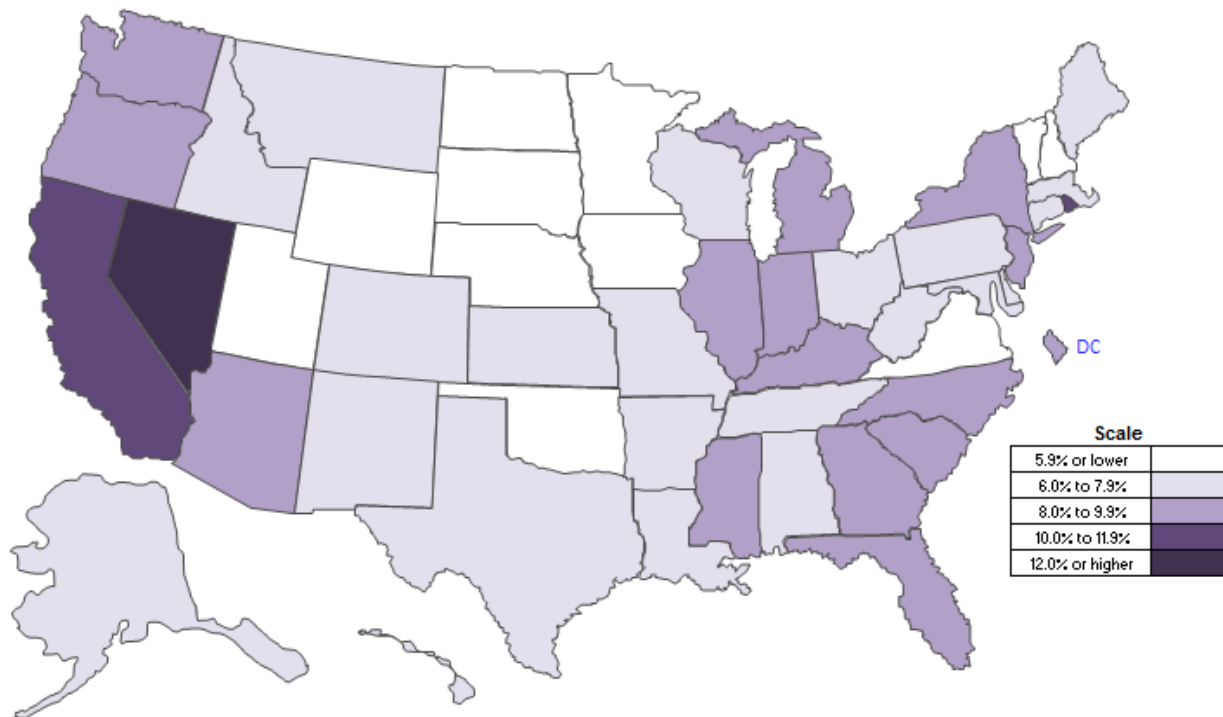
Since the recent recession, North Carolina has experienced high unemployment rates not seen since the mid-1980s. Between 2008 and 2011, unemployment in North Carolina grew from about 5 percent to its peak at about 11 percent in 2010 (see Figure 1). From there, the decline in unemployment has been steady but excruciatingly slow, causing the state's economic recovery to lag behind other states (see Map 1).

Figure 1

**North Carolina Seasonally Adjusted Unemployment Rate(%)
January 1980 to March 2012**



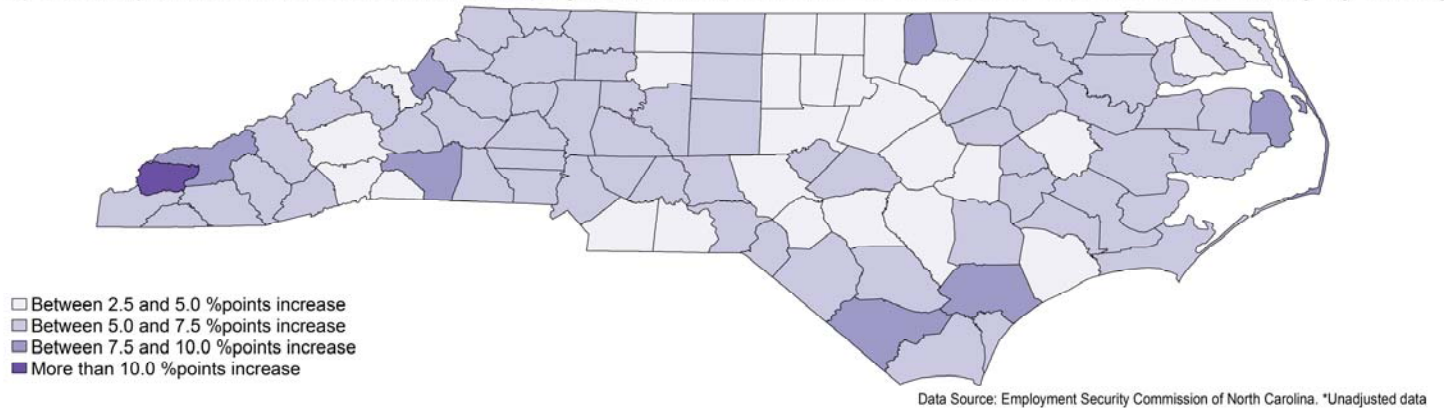
Map 1. Unemployment Rate Across the United States, March 2012



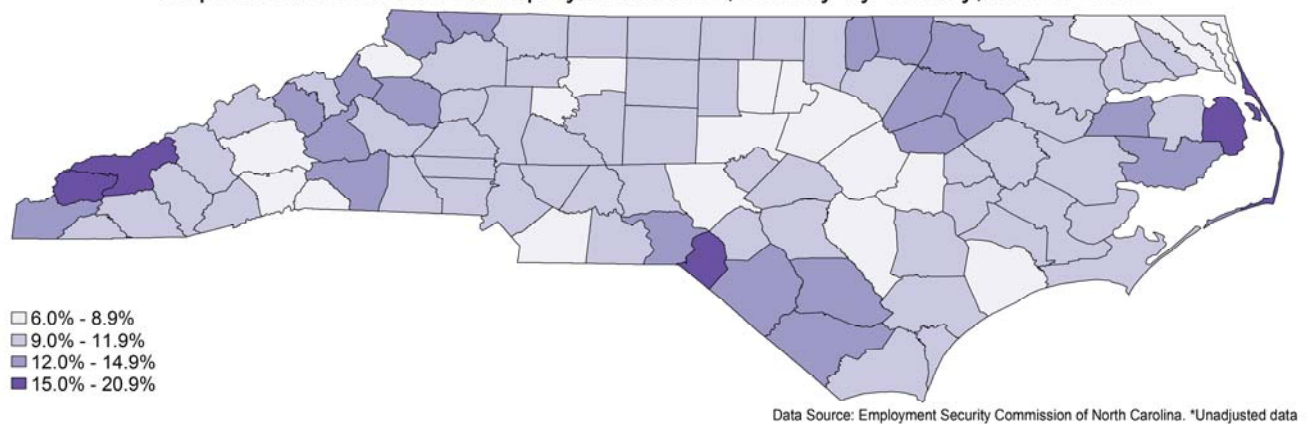
Source Data: United States Department of Labor, Bureau of Labor Statistics. *Seasonally adjusted

A comparison of unemployment rates in North Carolina counties between March 2007 and March 2012 shows that unemployment increased in all counties (see Map 2). However, urban counties saw more modest unemployment increases during this period (average of 2.5 to 5.0 percentage point rise.) Most non-urban counties saw more significant increases of five points or higher. Current unemployment rates show that most out-of-work North Carolinians reside in rural northeastern, southern and far western counties (see Map 3).

Map 2. Comparison of North Carolina Unemployment Rates; March 2007 Compared to March 2012, County-by-County



Map 3. North Carolina Unemployment Rates, County-by-County, March 2012

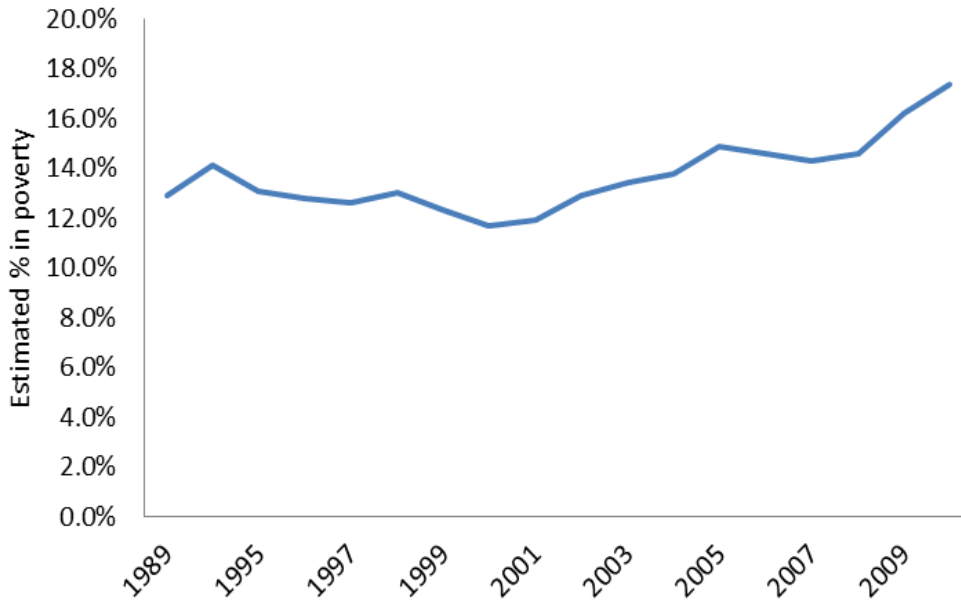


While recent decades have seen significant job growth in urban areas, poverty in North Carolina, especially rural poverty, has increased. Before the great recession, poverty peaked in North Carolina between 1993 and 1994 at about 14 percent. It reached a low point in 2000 at around 11 percent, corresponding to the low unemployment rate. However, after the recession, poverty spiked to 17.5 percent statewide in 2010 (see Figure 2).

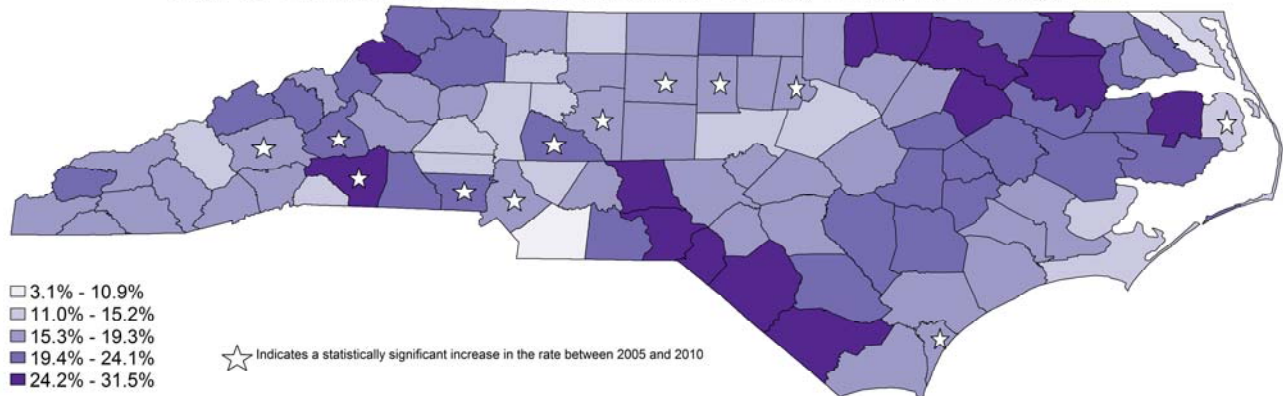
More telling are the poverty rates of individual counties. Rural counties in northeastern and southern North Carolina with the highest unemployment rates also have the highest poverty rates. Some counties, such as Rutherford in the west, Columbus in the south and Bertie in the east, have poverty rates of 24 percent or higher. In fact, there are 14 counties where, as of 2010, at least a quarter of the population was living in poverty (see Map 4). For 12 counties, poverty increased by a statistically significant amount (based on estimates with a 5 point margin of error).

Figure 2

Estimated Percent of People of All Ages in Poverty in North Carolina, 1989 to 2010



Map 4. Percent of All North Carolinians in Poverty, County-by-County, 2010



Data Source: U.S. Census Bureau, Small Area Income and Poverty Estimates (SAIPE).

Information about regional unemployment and how it correlates to poverty is useful in policymaking, especially in selecting job programs that are appropriate and sustainable in low- resource counties.

High Unemployment and Why It Matters

The correlation between unemployment and poverty is well documented. One study shows that the effect of unemployment is seven times higher than inflation in increasing the poverty rate.ⁱⁱ During an economic downturn, unemployment has the largest effects on low-wage earners who are already close to falling below the poverty level.ⁱⁱⁱ U.S. Census data shows that poverty increases as the number of weeks unemployed grows. In 2010, the poverty rate of the unemployed was double that of those who did not experience unemployment that year.

More distressing is the number of long-term unemployed. The prevalence of long-term unemployment

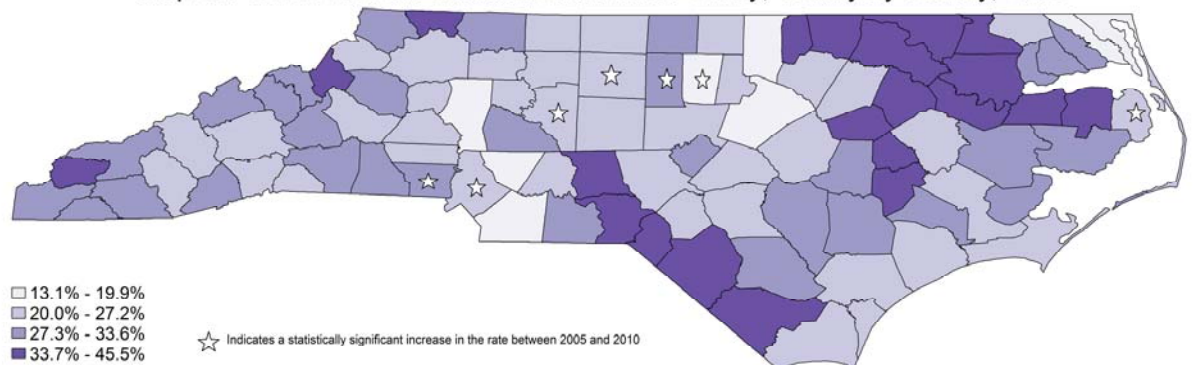
has become so common that the Current Population Survey (CPS), which tracks unemployment, changed its data collection method in January 2011. CPS previously asked individuals to report unemployment for up to two years, but has now extended this duration to five years. CPS states that there was “an unprecedented rise in the number of persons with very long durations of unemployment during the recent labor market downturn.” It approximates that 11 percent of those unemployed have been looking for work for more than two years.^{iv} In 2010, 30 percent of those who were long-term unemployed (unemployed 27 weeks or longer) were in poverty. Of course, unemployment affects not just the poor, but everyone in a community. As unemployment has risen and earned income has declined, the overall median household income has fallen. In 2010, the median household income in North Carolina fell by 12.3 percent to \$43,326.^v Many of these households may be just one job loss away from poverty, a circumstance discussed in Brief 2 of this briefing report.

Repercussions of Unemployment

For North Carolina families and families across the country, unemployment often means poverty, which may mean hunger, homelessness and other major challenges. Food insecurity is often an indicator of poverty. The United States Department of Agriculture (USDA) estimates that an average of 15.7 percent of households were food insecure in North Carolina between 2008 and 2010. Another 5.2 percent of households had very low food security during the same period. The food insecurity rate has increased significantly from the 2005 to 2007 average estimates of 12.6 and 4.0 percent respectively.^{vi} In essence, North Carolina families are struggling to pay bills, afford housing and even put food on the table. Thousands of families are going hungry because of unemployment and poverty.

All told, approximately 17.5 percent of households, or 1.6 million people, are now living below poverty in North Carolina.^{vii} That is up from 16.3 percent in 2009, approximately an 18 percent increase. More troubling is the trend of poverty growing among children. In 2010, the child poverty rate in North Carolina was 24.9 percent (see Map 5). That is up from 19.5 percent in 2007, a 21 percent increase. Of the 24.9 percent, about one out of ten were living in deep poverty, which is defined as half the household national poverty threshold.^{viii}

Map 5. Percent of North Carolina Children in Poverty, County-by-County, 2010



Past Policy Recommendations

In 2010, the Joint Legislative Study Commission on Poverty Reduction and Economic Recovery delivered its report to the North Carolina General Assembly. In the report, the bi-partisan committee considered four main areas of concern for North Carolina: tax issues, jobs, state programs and persistent poverty.

Across the four areas, the Commission developed 22 recommendations for policymakers to consider. In the area of taxation, the Commission recommended expansion of the Earned Income Tax Credit (EITC). With regard to jobs, the Commission reported that “if cuts to Medicaid were restored, some 40,000 jobs in the health care industry could be brought back to the state.” It also recommended that the General Assembly invest in child care so that more parents of young children could work outside the home. This recommendation was partially fulfilled in 2011, when a higher proportion of Smart Start funds were allocated to child care subsidies.

Other jobs-related recommendations included expanding Prison Education Programs in the Community College System and Work Opportunity Tax Credits. Regarding State programs, the Commission recommended improving housing programs, providing transportation services to rural areas and improving access to nutritional foods.

To address persistent poverty, the Commission cited the need for effective financial education and parenting education programs beginning in middle school. It also recommended the creation of more charter schools, another recommendation that was fulfilled in the 2011 session by lifting the state’s cap on charter schools.

Finally, the commission recommended the creation of standing committees on poverty reduction in both the House and Senate.^{ix}

Conclusion

The correlation between employment and poverty reduction is well documented. North Carolina is experiencing high rates of unemployment, which has led to an increase in poverty, especially in rural counties which have fewer resources. Poverty is detrimental to families and damaging to society. Policies that support job creation and job programs that get people back to work are essential to lowering North Carolina’s unemployment and poverty rates and supporting families. As discussed elsewhere in this report, policymakers may look to existing policy recommendations by the Joint Legislative Study Commission on Poverty Reduction and Economic Recovery and/or evidence-based jobs programs outlined in the Family Impact Seminar to reduce the unemployment rate, reduce poverty and help families get back on their feet.

ⁱU.S. Department of Labor, Bureau of Labor Statistics unemployment rate. (2012).
<http://www.bls.gov/cps/>

ⁱⁱPowers, E. T. (1995). Inflation, unemployment, and poverty revisited. *Economic Review - Federal Reserve Bank of Cleveland*, 31(3), 2-2.

ⁱⁱⁱNichols, A. & Callan, T. (2012). Urban Institute Research of Record: Unemployment and Poverty.

^{iv}U.S. Department of Labor, Bureau of Labor Statistics unemployment rate. (2012).
<http://www.bls.gov/cps/duration.htm>

^vNorth Carolina Budget and Tax Center (2010). 2010 Poverty and Deep Poverty Estimates based on U.S. Census Bureau Data.

^{vi}USDA (2012) Economic Research Service: Data Sets. State Fact Sheet: North Carolina.
<http://www.ers.usda.gov/StateFacts/NC.htm#PIE>

^{vii}U.S. Census Bureau (2011). Poverty: 2009 and 2010, *American Community Survey Briefs*.
<http://www.census.gov/prod/2011pubs/acsbr10-01.pdf>

^{viii}North Carolina Budget and Tax Center (2010). 2010 Poverty and Deep Poverty Estimates based on U.S. Census Bureau Data.

^{ix}The Joint Legislative Commission on Poverty Reduction and Economic Recovery (2010). Final Report to the 2010 General Assembly. Findings and Recommendations. pp. 19-24.

Brief 2

How Employment Links to the Fluidity of Poverty

Anirudh Krishna, Sanford School of Public Policy

Edited by Joel Rosch, Center for Child and Family Policy

This brief is based on a 2006 Sanford Institute working paper entitled “Escaping Poverty and Becoming Poor in Thirteen Communities in Rural North Carolina” by Anirudh Krishna, Christina Gibson-Davis, Liz Clasen, Milissa Markiewicz, and Nicolas Perez. The entire study can be found at <http://sanford.duke.edu/research/papers/SAN06-02.pdf>. More information on this approach to studying poverty called the Stages-of-Progress methodology can be found at: www.sanford.duke.edu/krishna.

In this study, interviews were conducted with the members of 312 randomly-selected households in 13 communities located in four geographically separate rural counties of North Carolina: Beaufort, Burke, Gates and Vance. The goal was to find out how families moved into and out of poverty between 1995 and 2005. Response from community members was enthusiastic with a total of 81 percent of all selected residents agreeing to participate in the interviews.

Each household provided its own account of the reasons for changes in the household’s economic movement during the ten year period. There were multiple similarities of these reasons across households, communities and counties, indicating that common factors are operating across the state. While not statistically representative of the entire state of North Carolina, this study is nevertheless indicative of several important trends, summarized below.

Over the ten-year period 1995 to 2005, a total of 23 percent of sampled households moved out of poverty; for instance, they were poor in 1995 and not poor in 2005. Conversely, 12 percent of households fell into poverty during the same period. Two opposite movements were simultaneously operating in every community that the study examined: some families were falling into poverty while others were moving out of poverty.

Relatively few households cycled into and out of poverty during the study period, 1995 to 2005. The majority who escaped poverty have remained out of poverty, while the majority who fell into poverty have remained poor. Spells of poverty have tended to be relatively long-lasting; descents into poverty were not commonly reversed.

Falling Into Poverty

Rather than any characteristics of the families or individuals concerned, the study found that discrete events led to descents into poverty. Health-related issues, such as illness, medical expenses and prescription drug costs were responsible for the largest number of movements into poverty. These health-related factors were associated with about one-third of all descents into poverty in the first five-year period, 1995 to 2000. During the second five-year period, 2000 to 2005, this percentage rose to 40 percent, indicating that the importance of health as a precipitator of descents into poverty may be increasing.

As one might expect, job loss was another common factor associated with descents into poverty. During the second five-year period, 2000-2005, this factor was associated with the largest number of descents. Job loss was associated with nearly 60 percent of all descents occurring during the second five-year period, compared to 16 percent during the first five year period, 1995 to 2000. Communities studied in

Burke and Vance counties were particularly hard hit by job losses. Burke County faced severe job losses due to declines in the manufacturing industry during the period 2000 to 2005, and Vance County experienced large numbers of descent into poverty on account of factory closings occurring between 1995 and 2000.

In multiple cases, health-related issues and job loss worked in tandem to cast households into poverty. Most households that mentioned job loss as a reason for downward movement also mentioned at least one health-related problem, such as illness, accident, disability or medical/prescription costs. Beyond the impact on income, job loss often implies loss of health insurance, which in turn increases the probability of falling into poverty. It is reasonable to suggest that if those who lost jobs had been protected by health coverage, the likelihood of their falling into poverty would have decreased significantly.

Family-related factors helped accentuate the effects of other factors, such as health effects and job loss. In general, being single, divorced or widowed tended to make one more vulnerable to descent into poverty, but these conditions alone did not precipitate a descent into poverty. Many households that suffered job loss or experienced severe health concerns were able to ward off poverty because of the help provided by family members and friends. Conversely, a loss of family networks was associated with a greater likelihood of falling into poverty.

No particular individual characteristic, such as race, gender or age, is significantly associated with falling into poverty. The same factors are responsible for descents within different population groups, and the same kinds of protections can help to stave off poverty for all.

Moving Out of Poverty

Employment was the primary factor associated with moving out of poverty. A total of 56 percent of all households escaping poverty between 1995 and 2000 did so on account of finding a full-time job or, more often, on account of taking up a second or third job. Beyond having a full-time job, households moving out of poverty often worked in more than one job, started a side business or benefited from a spouse's employment. Additional employment was especially important during the second five-year period, 2000 to 2005, when more than half of all households that escaped poverty had a member working more than one job.

Careful money management and budgeting were also associated with households who had employment and were able to move out of poverty. These factors tended to strengthen the safety nets that held these people out of poverty.

Preventing descent into poverty is as important as escaping poverty. Adverse shocks, such as severe health incidents, can happen in any household, and these incidents can have long-lasting effects. People who have one or more support networks – based in employment, family or the community – are less likely to fall into poverty. Individuals and households that lack these supports are more vulnerable.

Safety nets in the form of health coverage are particularly important. However, safety nets, jobs, health care access, budgeting and family assistance are not equally available in all communities.

Isolating the different reasons for movement into and out of poverty is a crucial step in formulating locally-appropriate responses to poverty. Additional studies in other parts of North Carolina could help determine more precisely the range of trends and reasons. These findings could be a crucial step in

beginning a dialogue about how to reduce the number of households falling into poverty – and increase the ability of households to escape it. Such focused, thoughtful work can increase and strengthen overall community well-being.

How this study was done

This study used the *Stages of Progress Methodology* developed by Dr. Anirudh Krishna, professor at Duke University, to answer questions about how people understand the *material* aspects of poverty.ⁱ First applied in rural areas of India, the *Stages of Progress Methodology* has been used in a number of countries around the globe as well as in rural North Carolina. Dr. Krishna has also used this method to ask questions about the strategies poor households use as they try to escape poverty; what leads households to fall into poverty; and how these strategies and causes change over time. (A detailed field manual on the *Stages of Progress Methodology* is available at <http://sanford.duke.edu/krishna/SoP.pdf>.)

Using the *Stages of Progress Methodology*, Dr. Anirudh Krishna and his research team asked people in 13 North Carolina communities to identify where, along a continuum, a family would no longer be poor in their estimation. Community members then agreed on a cut-off line below which they would consider a household to be in “extreme poverty,” and above which a household would be considered “poor.” Similarly, a second cut-off line was also agreed upon which signified that a household was “not poor.” Table 1 presents a typical stages-of-progress yardstick developed in a rural North Carolina community.

Table 1. Stages of Progress		
Stage 1	Obtain basic shelter	
Stage 2	Obtain food	
Stage 3	Some form of transportation – used car; money for gas to pay neighbor for a ride	
Stage 4	Clothing	
<i>Poverty cut-off:</i> Beyond this line, households are no longer considered in poverty		
Stage 5	Phone – land line or cell phone	
Stage 6	In-home entertainment, usually a TV	
Stage 7	Buy own car/better car	
Stage 8	Savings/Pay off debt	
<i>Prosperity cut-off:</i> Beyond this line, households are considered relatively well-off		
Stage 9	Buy a house	
Stage 10	Save for children’s education	
Stage 11	Vacation	

In this example, community members considered a household to be in “extreme poverty” if it was at or below Stage 4; for instance, if it was unsuccessful in obtaining shelter, food, transportation and clothing. Above “extreme poverty,” was a middle category defined as “poor.” Households were considered “poor” until they crossed past Stage 8 into Stage 9; for instance, until they were able to purchase a home (often a mobile or starter home), after which the household was said to be “not poor” or “doing alright” or “not struggling anymore.”

Not only did communities actively participate in the study, but they also revealed a solid understanding of the *Stages of Progress Methodology*. During community meetings, participants resonated with and quickly understood the process of creating such a yardstick. After a careful initial introduction to the exercise, relatively little probing was required by the researchers because community members carried on the conversations quite confidently among themselves: “No, I think someone would buy a telephone before they would buy a television.” “I think we forgot about transportation. How can someone get a job if they don’t have a car?”

The yardsticks created by each community are quite revealing. The first four stages are nearly identical across all 13 communities. In order, they are: food, shelter, clothing and some form of transportation. Based on the placement of these four items and discussions in the community meetings, we understood these four items to be the basic necessities in rural life. In the analysis of the data, a household was labeled in “extreme poverty” if it could not provide these four basic items for itself.

Once the yardsticks move beyond the first four stages, there is more variety in the stages. Large commonalities still exist, however. Though the order of obtainment might differ, most communities agree that after the first four basic necessities, a typical household obtains a telephone, a television, and a more reliable car, and can also meet basic health care needs. In all but two communities, “homeownership” or “ability to save” indicated that a family had moved out of poverty.

While it would have been feasible to construct a unified definition of poverty, it was also important to ensure that these community distinctions were captured. Accordingly, for the purpose of analysis, Krishna’s team defined a household as “poor” or “not poor” based upon the definition of poverty generated by the household’s particular community. For the definition of “extreme poverty,” however, Krishna’s team relied upon the unified definition of being unable to provide food, shelter, clothing and/or transportation.

ⁱThe *Stages of Progress Methodology* acknowledges that poverty has many dimensions – economic, psychological, social, etc. Attempting to capture all of these dimensions with a simple tool is perhaps impossible. For this reason, the *Stages of Progress Methodology* has as its focus the material aspect of poverty.

Brief 3

Unemployment: How it Effects Family Behavioral Health

Amy Finnegan, Center for Child and Family Policy

Job loss does not only affect family income. Job loss impacts family stability and child development. Long-term job loss also makes it much harder for people to re-enter the job market.

This brief focuses on the behavioral implications of involuntary job loss – feelings of losing self-control and identity and possible resulting depression. It also highlights strategies for identifying and addressing negative behaviors before they become severe and hold people back from being active and engaged members of their communities and from being involved in their children’s lives.

The Impacts of Job Loss on Children and Families

Research shows that involuntary job loss affects both mothers and fathers of all children and can have negative consequences for children’s academic achievement, behavior in school and college aspirations.

Children whose fathers were involuntarily unemployed (for example, lost their jobs due to structural changes in the economy) experience a higher likelihood of repeating grades in school and of being suspended/expelled from school compared to children whose mothers were involuntarily unemployed, and compared to those whose parents were employed. Much of the negative impacts on children are due to family dynamics that are exacerbated by male head of household unemployment.ⁱ

A 2007 study found that parental job loss can derail a child’s college aspirations.ⁱⁱ Middle-class white children whose parents became unemployed during the time period of the study were six percentage points less likely to enroll in college, and middle-class black children were nineteen percentage points less likely to enroll in college than children of the same race whose parents did not lose their jobs during the time period of the study.

Involuntary job loss remains a problem even though the Great Recession ended in 2009.

Impacts of Long-term Joblessness on Re-employment

Long-term unemployment, which the Bureau of Labor Statistics defines as being out of work for 27 weeks or longer, often makes it harder for people to re-enter the job market. This is evident in the trends of individuals in their thirties to fifties returning to live in their parents’ homes. It is also evident from the number of highly educated workers, even some with advanced degrees, who are taking jobs below their skill level.ⁱⁱⁱ Some employers are choosing not to even consider long-term unemployed individuals by issuing job announcements informing the unemployed that they need not apply.^{iv} This raises concerns about whether long-term unemployed individuals will be able to find new jobs.

There is now research indicating that people who are unemployed for more than six months will have an especially hard time re-entering the labor market.^v A 2010 Pew Research Center survey reports that long-term unemployed people become less optimistic about finding jobs as meaningful and high-paying as the ones they lost and are less likely to report that the jobs they found are as good as the ones they lost.^{vi} This could be because those unemployed for longer periods of time eventually take jobs they are over-qualified for in order to make ends meet. Feelings of a loss of self-worth can occur for the long-

term unemployed who must choose between no job and a loss of pride in taking a job for which they are over-qualified.

The Link Between Job Loss and Depression

"Spouses are fighting more often, people may turn to drugs or alcohol, smoking, overeating," says Dr. Sudepta Varma, Psychiatrist at New York University Medical Center. "...the anxiety and the depression and the substance abuse [that can follow]... are often extremely more damaging than the job loss."^{vii} Not all job loss leads to substance abuse and other negative behaviors. People cope with loss in their own ways and job loss can be more stressful for one individual if that individual also faces other stressors. Stress can increase as the time between job loss and finding a new job lengthens. According to the Pew study, those who experienced long-term unemployment were twice as likely to experience depression and seek professional help as those unemployed for six months or less.^{viii}

Depression related to job loss can strain individuals, relationships and entire communities. While they may have more time, depressed individuals who lose their jobs usually invest less time and resources in community and family activities. This may include helping less with events at their children's school, engaging less in homework with their children, participating less in community activities such as civic clubs, or being less able to maintain their homes in good condition. Personal relationships suffer when spouses blame one another for not foreseeing job losses, not saving enough income in good times and not cutting spending during bad times.

Stress in parental relationships can cause arguments and have negative impacts on children. Individuals, both men and women, may suffer severe negative consequences from job loss when their identity is tied to providing economic stability for themselves and their families. Depression can spill over into an individual's physical health, leading to worsened physical health and chronic conditions. Even re-employment can fail to ameliorate the negative impacts of job loss if new jobs have lower salaries, less opportunity for advancement and do not allow employees to use their educational achievements to the fullest extent possible.^{ix}

It is not just those who are unemployed that experience depression and anxiety. Those who remain at work can take on a form of "survivor's guilt," wondering why they were not laid off and whether they will be next. Moreover, remaining employees often are asked to take on the work their former colleagues had been doing, which adds stress to the still-employed.^x

Strategies for Identifying and Addressing Job Loss Related Depression

Job loss negatively affects children and families through both financial and behavioral channels. Preventing, identifying and treating individuals at risk of job loss related depression is a key first step in mitigating these negative impacts. Proven strategies for employers and policymakers are outlined below.

Employers

Employers can help employees transition to unemployment by connecting them with financial and emotional support services found at the 95 JobLink Career Centers across North Carolina or with online job loss resources available through federal One Stop Career Centers. (<http://www.careeronestop.org/>). Most important in softening the blow of unemployment is providing all employees with accurate and timely information on the events preceding and following a layoff. This is important not only to dispel any rumors that may fuel heightened anxiety in the workplace but also to allow employees to plan ahead

as much as possible.^{xi} The federal Department of Labor has Rapid Response teams in every state that can be called in for layoffs involving 50 or more workers. Rapid Response teams help employees cope with job loss by connecting them with workshops on stress management, financial planning and other challenges. Rapid Response teams provide information on local job markets and focus on returning employees to work.^{xii} One way to show support for employees experiencing job loss is for employers to allow Rapid Response teams and other support services to provide their information and assistance on company time. This can help ensure that the job loss coping process begins as quickly as possible and keeps employees from having to take time off, possibly unpaid, to benefit from the support opportunities.

Policymakers

Identifying children whose parents have experienced job loss related depression is possible without tapping into significant additional resources. Teachers, health professionals and other community members can constantly be on the lookout for children displaying aggressive behaviors or withdrawing from activities. Teachers are especially valuable resources because they see children frequently and are likely to notice even slight changes in those children; they are therefore able to refer children to available services quickly.

Policymakers and employers can support funding for workshops that help professionals develop the skills needed to identify depression and individuals at-risk for depression. Mental Health First Aid courses and webinars sponsored by the National Council for Community Behavioral Healthcare are examples of some of the workshops currently available. This training enables professionals to identify behavior changes in children and adults more quickly, which allows faster referrals to services thereby mitigating spells of depression before they become deep and lingering. Evidence shows that such workshops are valuable for people who work in a range of fields.^{xiii}

Furthermore, policymakers can pass legislation prohibiting companies from discriminating against unemployed persons in job advertisements. Oregon, New Jersey and Washington, D.C. have banned discrimination based on employment status, and other states have pending legislation.

Workforce development programs that focus on skill development and enhancement can be instrumental in helping unemployed persons regain their self-worth through learning new skills and increasing their marketability for jobs outside of their current skill range. Learning new skills and securing a job can boost the confidence of unemployed persons and help them become active, contributing members of society.

Conclusion

Job loss is highly stressful, but employers, policymakers and employees can prepare for job loss in ways that help soften the blow. Employers can help employees prepare for job loss by connecting them with federal programs such as Rapid Response and county JobLink centers. Among other roles, policymakers can provide funding to ensure that a range of professionals who interact with children receive training on how to identify the early warning signs of the negative impacts on children of parental job loss.

ⁱKalil, A., & Ziolo-Guest, K. M. (2008). Parental employment circumstances and children's academic progress. *Social Science Research*, 37(2), 500-515. doi: 10.1016/j.ssresearch.2007.08.007

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ⁱⁱⁱMotoko, Rich. (2011). For the jobless, little hope of full recovery. The New York Times. <http://www.nytimes.com/2011/12/02/business/for-jobless-little-hope-of-full-recovery-study-says.html?pagewanted=2&r=1>

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^{vi}Pew Research Center. (2010). The impact of long-term unemployment.

^{vii}CBS News. (2009). Job loss and depression. http://www.cbsnews.com/2100-3455_162-4814655.html

^{viii}Pew Research Center. (2010). The impact of long-term unemployment.

^{ix}Greenberg, Melanie. (2011). Preserving mental health during unemployment. Psychology today. <http://www.psychologytoday.com/blog/the-mindful-self-express/201110/preserving-mental-health-during-unemployment>

^xKviat, Barbara. (2009). After layoffs, there's survivor's guilt. TIME. <http://www.time.com/time/business/article/0,8599,1874592,00.html>

^{xi}University of California Human Resources. (No date). Job loss and transition. Retrieved online 4/16/2012. http://ucsfhr.ucsf.edu/index.php/layoffguide/article/2499/?parent_entry_id=2491

^{xii}North Carolina's Rapid Response manager is Russell Doles (ph. 919-329-5284). Mr. Doles works out of the NC Chamber of Commerce and is based in Raleigh.

^{xiii}Worrall-Carter, L., Ski, C. F., Thompson, D. R., Davidson, P. M., Cameron, J., Castle, D., & Page, K. Recognition and referral of depression in patients with heart disease. *European Journal of Cardiovascular Nursing* (0). doi: 10.1016/j.ejcnurse.2011.04.005. See also Gerrity, M. S., Williams, J. W., Dietrich, A. J., & Olson, A. L. (2001). Identifying Physicians Likely to Benefit From Depression Education: A Challenge for Health Care Organizations. *Medical Care*, 39(8), 856-866.

Brief 4

Creating Evidence-Based Jobs Programs: What Works? What Doesn't?

Ron Haskins, Co-Director, Center on Children and Families, Brookings Institution, and staff at Duke University's Center for Child and Family Policy

Governments fund a wide variety of social programs, but many of them fall short. In this time of fiscal austerity, policymakers often turn to evidence of program effectiveness to guide their decisions. One of the main motivations for evidence-based policymaking is to build a foundation for economic prosperity. This brief covers several evidence-based jobs programs (career academies, preschool education, sector strategies) that help equip workers with the skills to meet current labor force needs and help businesses improve productivity (e.g., manufacturing extension programs). If policymakers use evidence to eliminate programs that do not work and expand programs that do, government will be more efficient, and individuals, families and the nation will be better off.

Both the federal government and state governments have enacted a host of social programs designed to make individuals, families and communities better off, but many of them fall short. Research shows that while a number of these programs are either ineffective or only marginally effective, there are several programs that have been shown by research to be effective. When implemented properly, they help make individuals, families and the communities where they are located better off.¹

In the current age of fiscal austerity, cuts in social programs are inevitable and opportunities for new programs are limited. It is far better if policymakers cut programs that have negligible or even negative impacts, and instead focus their efforts to save money on programs that either have been shown to be effective or show promise for producing successful outcomes.

In this brief, I will define evidence-based programs and give four examples of jobs programs that have been shown to work through rigorous evaluations. I will conclude with steps that the federal government has taken to implement evidence-based jobs programs, and will discuss the implications this approach may have for state policymakers.

What are Evidence-Based Programs?

Rigorous program evaluations have produced strong evidence of effectiveness for a range of social programs. The best evidence comes from programs studied in typical community settings using well-designed experiments. In experiments, subjects are randomly assigned to a condition that receives the treatment and then compared to a no-treatment condition. Experiments of this sort provide evidence of cause-and-effect, verifying that the social program actually causes a change in an important life outcome. Effective social programs show sizeable impacts on important life outcomes that are sustained over time.²

In the field of medicine, evidence-based programs have led to remarkable improvements in human health over the past 50 years and more. Evidence-based programs have overturned previously accepted practice. For example, stents to open clogged arteries have been shown to be no better than drugs for most heart patients. Randomized trials can be credited for most of the major medical advances of the past half century including vaccines for polio, measles and hepatitis B, as well as effective treatments for hypertension, high cholesterol and many cancers.³

Examples of proven effectiveness in social policy are less abundant than in medicine, in part because rigorous evaluations are still not common in most areas of social policy. If more evidence-based

programs are developed and used, they could improve the lives of millions of Americans.⁴

Examples of Evidence-Based Jobs Programs

Evidence-based jobs programs include those that have been shown to increase the quantity or quality of labor demand or labor supply. In this brief, I highlight four such programs:

- Manufacturing Extension Programs;
- Career Academies;
- Preschool Education; and
- Sector Strategies.

Evidence-based programs improve labor demand by helping businesses create jobs and improve their productivity. Evidence-based programs can improve labor supply by giving preschoolers a solid foundation and by helping prepare youth and disadvantaged workers to qualify for and fill available jobs.

Manufacturing Extension Programs

Manufacturing extension programs (MEPs) help small manufacturers find new markets and improve productivity or product design.⁵ Free or highly subsidized advice is provided on modern manufacturing technology, process improvement, employee training, information technology and so forth.⁶

These programs are funded, in part, by the U.S. Department of Commerce along with state government and business user fees.⁷ MEP staff provide consultation or serve as an honest broker to private firms or faculty at universities or local community colleges.⁸ Studies show that manufacturing extension programs help create jobs and improve business productivity.

MEPs seem to be more cost-effective in creating jobs than even the best-designed business tax incentive programs. Some studies suggest that for every dollar invested, manufacturing extension programs increase the present value of local per capita earnings by as much as \$30; this return on investment is much greater than the return on business tax incentives.⁹ Studies show that manufacturing extension programs produce these remarkable outcomes by helping businesses create jobs and improve their productivity. One rigorous study of eight extension centers in two states compared participating and nonparticipating businesses; the labor productivity of participating businesses grew between 3.4 percent and 16 percent from 1987 to 1992.¹⁰ Not surprisingly, business clients are satisfied with the program. In surveys of 4,891 businesses, almost two-thirds (64%) report that MEPs led to productivity improvements.¹¹

These services benefit small- and medium-size businesses that are less productive than larger businesses due to barriers of information, expertise and financing of needed services. By helping overcome these barriers, public policy can help the economy by having a high impact on smaller manufacturers who increasingly are serving as suppliers to larger manufacturers.^{12, 13}

Career Academies

Career Academies help high school students find a trade that leads to a decent job.¹⁴ In a gold standard study, Career Academies produced major impacts on male employment and earnings and, surprisingly, on marriage rates as well.¹⁵

Career Academies have three distinguishing features. First, to compensate for the disadvantage of attending a large high school, Career Academies operate as a school-within-a-school with 150 to 200 students who attend classes together, have the same teachers, and have the same counselors and administrators. Second, the curriculum combines regular academic courses and technical courses related to employment. Third, and perhaps most important, the Career Academies conduct employer-sponsored activities that help students better understand the world of work. Activities include field trips about careers, job shadowing (in which students have the opportunity to accompany an adult to his or her job for a day) and mentoring about personal and professional issues related to employment. In a study that followed participants for 8 years after leaving high school, males who participated in Career Academies earned an average of nearly \$3,700 more each year (or around \$30,000 more over the 8 years of the study) than their male peers who attended regular high schools. This earnings gain is even larger than the earnings increase from two years of enrollment in a community college. Despite predictions that enrollment in career-oriented high school programs would reduce the probability of college attendance, students enrolled in the Career Academies were just as likely to continue their education at postsecondary institutions as students in the control group.

Equally remarkable, boosting economic prospects promoted the transition of these young men into family roles. Males who participated in the Career Academy group were 33 percent more likely to be married, 46 percent more likely to be a custodial parent and 36 percent less likely to be a noncustodial parent. Career Academies is one of the few social programs shown to increase marriage rates and decrease the incidence of fathers living apart from their children. Earnings appear to be a key factor in making young males attractive marriage partners.¹⁶

Preschool Education

No human capital program is so widely believed to be effective as preschool education for children from low-income families.¹⁷ Well-evaluated preschool programs including two small scale programs (The Perry Preschool Program in Michigan and the Abecedarian program in North Carolina) and a public program that operated in 20 schools (the Child-Parent Centers in Chicago) have produced remarkable long-term impacts. All three programs used a formal curriculum and featured well-trained and supervised teachers. These and similar programs have been shown to produce both immediate and long-term impacts on the development of poor children.¹⁸ The impacts include:

- Improved school readiness;
- Reduced grade retention and special education placement;
- Increased high school graduation rates;
- Increased college enrollment;
- Reduced delinquency and crime;
- Reduced rates of teen pregnancy; and
- Increased adult employment and earnings.

Some of the cognitive gains fade over time. Still, all three programs reduced the likelihood of school dropout by 24 percent to 32 percent, and the Abecedarian program increased enrollment in 4-year colleges.¹⁹

Thirty-nine states have established their own pre-Kindergarten programs.²⁰ Recent evaluations of state pre-K programs show that they produce impacts at the end of the preschool years and, in a few cases, a year or two after the programs ended. These studies provide rigorous evidence that even large-scale preschool programs can have broad effects that boost human capital.²¹ States benefit from these programs because over three-fifths of preschool participants stay in the state they grew up in, thereby improving the quantity and quality of their state's labor supply.²²

Sector Strategies

There is strong evidence of the effectiveness of training programs that help low-income people build skills that are needed in particular industry sectors. The key elements of sector programs are:

- Focusing on a particular industry or set of industries;
- Recruiting potential workers with an interest and aptitude for success in that industry;
- Providing training on the range of skills needed to be successful in the sector; and
- Providing a range of social supports such as transportation, housing and financial assistance.²³

One example of a state-sponsored sector program is the Wisconsin Regional Training Partnership (WRTP) in Milwaukee. WRTP was designed to meet industry needs for short-term, job-specific training. WRTP is a membership organization founded in the 1990s by employers and unions with funding from public, philanthropic and private investors. The construction industry contributes two cents per hour worked to a workforce development and diversity fund that helps finance the program (see www.wrtp.org/why-we-succeed.php).

Initially, WRTP focused on the construction and manufacturing sectors, but recently has included training in road construction, lead abatement/hazardous materials and commercial driver's license preparation.²⁴ Training is short term, ranging from 40 to 160 hours spread over 2 to 8 weeks. Industry experts, local technical colleges, or community colleges provide the training, and agencies and community-based organizations provide the support services. In a rigorous study, WRTP guided disadvantaged workers into higher-quality jobs than they might otherwise have secured. When compared to nonparticipants, WRTP participants earned significantly more, worked in higher-wage jobs, and secured jobs that were more apt to include benefits. Participants were also more likely to obtain certifications in construction and the trades. In addition, several types of disadvantaged workers benefited from earnings gains including women, African Americans and ex-offenders; however, the program did not affect the earnings of young adults and welfare recipients.²⁵

How Could Policymakers Build Evidence-Based Policy?

The federal government has made a sweeping and groundbreaking effort to use rigorous program evaluation to guide policy decisions. In interviews of key officials and advocates involved in the initiatives, we have identified five steps for building evidence-based policy that may also have implications for state policymakers:

1. Select an important social problem that, if remedied by social policy, would make individual citizens and the nation better off;
2. Identify evidence-based programs to remedy the problem;
3. Obtain funds to attack the problem by scaling up only program models supported by rigorous evidence of success;
4. Make the funds available to government or private entities with a track record of effective implementation that agree to implement the successful program models; and
5. Continuously evaluate the programs to assess how well they are being implemented and whether they are producing the intended results.

Conclusion

Government can increase its effectiveness by using rigorous evidence about what works in tackling important social problems. Investing in evidence-based jobs programs can help policymakers build the foundation for economic prosperity.

Manufacturing Extension Programs can improve labor demand by helping businesses create jobs and improve productivity. Evidence-based programs can also improve the quantity and quality of labor supply by getting kids started on the right foot with preschool education, and by helping high school students get work experience that leads to a decent job. As a bonus, good jobs appear to make young males more attractive marriage partners. For disadvantaged workers who have trouble finding good jobs, employer-based sector strategies can train workers with the skills that industry needs.

Even when budgets are tight, policymakers are confronted with decisions about funding programs that attack important social problems. Policymakers can turn to evidence about what works to help make tough budget decisions. If policymakers use evidence to eliminate programs that don't work, and expand programs that do, government will be more efficient and the nation will be better off.

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Haskins was the editor of the 1996, 1998 and 2000 editions of the "Green Book," a 1,600-page compendium of the nation's social programs that analyzes domestic policy issues including health care, poverty and unemployment.

Haskins is a senior editor of "The Future of Children," a journal on policy issues that affect children and families. He has published widely on child care, child protection, child support enforcement, family composition and marriage, and welfare reform. In 2009, he published the book "Creating an Opportunity Society," and in 2008, he published "Getting Ahead or Losing Ground: Economic Mobility in America."

Haskins was named one of the 100 most influential people in the federal government by the "National Journal." He received several other awards including Lifetime Achievement Award from the Federal Office of Child Support Enforcement (2000), the President's Award for Outstanding Contributions to the Field of Human Services from the American Public Human Services Association (2005), and the Lion Award from the Grantmakers for Children, Youth, and Families (2010). Previously, he was a senior university researcher, a high school social studies teacher and a noncommissioned officer in the Marines.

This brief was adapted from the following publications:

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Appendix I: North Carolina Industrial Extension Service

The Industrial Extension Service of North Carolina (IES)ⁱ provides education and technical assistance to businesses and industries across the state. IES works one-on-one with small and medium sized manufacturersⁱⁱ to help them stay competitive and, in the process, save jobs and increase profits. The IES staff helps companies with process improvements, with implementing modern practices, and with incorporating new technology. Since 2000, IES has helped create \$2.28 billion in economic value for the state of North Carolina.

IES brings research and expertise from North Carolina State University's College of Engineering to the workplace, to help businesses and organizations thrive. IES works across North Carolina, with all industries, to solve problems and deliver results including lower costs, better products, and higher efficiencies. In 2011, 159 client companies responded to National Institute of Standards and Technology (NIST) – Manufacturing Extension Partnership (MEP) surveys about the economic impact of IES partnerships. Respondents reported \$313 million in economic impact from IES activities.

Since 1996, IES has served as the North Carolina center for the federal Manufacturing Extension Partnership (MEP). The MEP program is a federal network of manufacturing development centers that work with businesses to disseminate information on cutting-edge technology to improve their businesses. The North Carolina MEP includes IES, the Polymers Center of Excellence (<http://www.polymers-center.org/>) in Charlotte, and the Manufacturing Solutions Center (<http://www.manufacturingsolutionscenter.org/index.html>) at Catawba Valley Community College in Hickory.

Who Funds IES?

As the budget breakdown below illustrates, about a third of the IES budget comes from client fees for services. As the state center for the federal MEP, IES receives another 21 percent of funds through the National Institute of Standards and Technology. The state of North Carolina matches the MEP funds and, since FY06-07, has increased its contribution beyond the required match. The remaining 3 percent of the IES budget is split about equally between gifts and supplemental and other state receipts.

The 2011-12 IES budget totaled \$11.24 million from various sources:

- Receipts (Fee-For-Service): \$3.55 million
- State Appropriated Funds: \$3.17 million
- MEP Federal Funds: \$2.35 million
- State and Industry Contracts: \$1.76 million
- Gifts and Other Supplemental Receipts: \$0.41 million

For 2011, IES produced a return on investment of \$27:1 on its total budget.

Where Is IES?

IES headquarters is on the Centennial Campus of N.C. State University, and its service territories reflect the state's Economic Development Partnership Regions. IES has 12 offices, including:

Albemarle
Asheville
Dobson
Fayetteville
Greensboro
Hickory

Kannapolis
Raleigh (2)
Rocky Mount
Wilkesboro
Williamston

IES has 80 employees, half of whom work in the central office at N.C. State in areas including client services, accounting, human resources, information technology, marketing, and administrative support. The remainder work outside Raleigh, either within regional offices, from home offices, or at the Minerals Research Lab in Asheville.

IES Technical Assistance Programs

Technology Incubator: IES manages the N.C. State Technology Incubator (<http://techincubator.ncsu.edu/>) on Centennial Campus, where more than 24 technology-based companies at a time may be nurtured until they transition into self-sufficiency. A 2007 Research Triangle Institute report credited the Technology Incubator with creating 894 jobs and \$75 million in economic benefit since its inception in 1999.

Minerals Research Lab, Asheville: IES manages the Minerals Research Lab (MRL) in Asheville, which is equipped with mineral processing equipment and an analytical support facility for mineral characterization. Most of MRL's research efforts are conducted for corporate sponsors.

North Carolina is fortunate to be home to a range of services that support the manufacturing sector, of which IES is one example. Policymakers seeking to advance the state's prosperity through evidence-based innovative manufacturing strategies and enhanced employment options can look further into such options with IES and its counterparts throughout the state.

More information on IES can be found at <http://www.ies.ncsu.edu/ncmanufacturing/> or by contacting Gray Rinehart (gray_rinehart@ncsu.edu).

ⁱAdapted by Amy Finnegan, Duke Center for Child and Family Policy, from IES material and online resources produced by Gray Rinehart, IES.

ⁱⁱThe U.S. Small Business Administration (SBA) considers any business with fewer than 500 employees to be a "small" business; IES uses 500 as the working limit for "small to medium."

Appendix II : Welfare Reform Liaison Project

Welfare Reform Liaison Project, Inc., OIC – Community Action Agency

The information in this document comes primarily from a Case Study conducted by the Community Action Partnership in Washington, DC, with information updated through May 2012.

Agency Background

The Welfare Reform Liaison Project (WRLP) is a nonprofit organization that provides job training and placement services to unemployed or underemployed individuals, including ex-offenders, in Guilford County, North Carolina. The agency's mission is to move people out of poverty. Since its inception in 1996, WRLP has trained low-income workers and individuals with criminal records and helped more than 250 of them get jobs. WRLP has developed successful programs that they believe other organizations can replicate in other parts of the state.

WRLP operates several programs that are connected to its primary goal – to help people get and keep jobs. All of the programs involve workforce development and all use the basic components of the WRLP model:

1. Trainees develop the basic habits, social skills, values and general attitudes that are needed for any job.
2. WRLP seeks employment opportunities for program participants and identifies the specific skills, knowledge and abilities employer partners are seeking.
3. WRLP places trainees in internship positions where they put their new skills to use.
4. A number of the internships turn into jobs.
5. Trainees gain the skills, confidence and references that help them succeed in job searches.
6. WRLP works with former trainees on job retention.
7. Satisfied employers seek additional trainees from WRLP.

WRLP is located in Greensboro, North Carolina. The organization began in 1996 as the result of a challenge that Bishop George W. Brooks, the Pastor of Mt. Zion Baptist Church in Greensboro, made to Odell Cleveland. Cleveland was completing his thesis at Hood Theological Seminary and had written a response from the Black church to The Personal Responsibility and Work Opportunity Reconciliation Act of 1996, known as the Welfare Reform Act of 1996. Bishop Brooks challenged Cleveland to develop a program to respond to the Act, and the Welfare Reform Liaison Project began. We are “out in the community, making a difference,” said Reverend Cleveland.

Just one year after the agency officially began, it received a grant from the United Way of Greater Greensboro for \$20,000 to assess how religious congregations were responding to welfare reform. The grant led to a formal relationship between WRLP and the United Way in which WRLP managed the United Way's Gift-in-Kind program. This program distributes consumer goods from corporations to nonprofit organizations that assist low-income families.

WRLP used this experience to build programs to help people get jobs and move out of poverty. While Reverend Cleveland had the vision to carry out the agency's mission, a partnership with Dr. Robert Wineburg and other researchers from the University of North Carolina at Greensboro helped

develop WRLP's outcome driven model. Wineburg and Cleveland later co-authored *Pracademics and Community Change - A True Story of Nonprofit Development and Social Entrepreneurship During Welfare Reform*, which promotes the WRLP model.

On a typical day of training, WRLP president Odell Cleveland works with trainees, in part by using the books, *Who Moved My Cheese?*, by Spenser Johnson and *The Seven Habits of Highly Effective People*, by Stephen Covey. Cleveland teaches the trainees to embrace change and adopt successful habits. "We recycle lives by providing job skills and (by) giving people one of the most important characteristics they will need in life, which is their dignity," said Odell. "We want our participants to feel valued, so that they take that (value) to their jobs, their families and wherever they go in the community."

WRLP's Training Model

WRLP maintains a four step training system. The first step (Level 1) consists of six weeks of core classes that focus on basic skills such as computer use, money management, human resource development (including resume development and interviewing) and personal development. The Personal Development course, taught by Cleveland, uses the lessons learned in *Who Moved My Cheese?* to assist students who are struggling with life changes. One of the major purposes of Level 1 courses is to vet students in order to determine whether they are committed to high work performance. Level 2 consists of content level courses designed for specific career tracks and internships within the career tracks. Internships last between three and 12 weeks, depending on the career area. As internships finish, students enter Level 3, which consists of job search and employment application assistance provided by a WRLP Job Developer and other WRLP staff. Once employed, WRLP may provide trainees with support for up to 90 days (Level 4).

Examples of WRLPs Workforce Development Projects

With its workforce development focus, WRLP operates several programs that are all connected to its primary goal – to help people get and keep jobs. The following are examples of WRLP's partnerships with local businesses. These partnerships are designed to benefit the trainee as well as provide cost-effective, skilled labor for employers.

Digital Imaging

The agency's largest training program is in digital imaging. WRLP offers comprehensive classroom training in this area. The course reviews all aspects of digital imaging: document preparation, the scanning process, indexing information into a database and performing a quality control check at the conclusion of the process. The course is followed by an off-site internship.

WRLP actively recruits local businesses for developing job opportunities in digital imaging. For example, two program graduates obtained employment with the HF Group, a national company that does conservation work for customers such as the U.S. Supreme Court, The National Archives and The Library of Congress. The HF Production Manager who was involved with hiring the WRLP graduates expressed the benefits of getting "pre-vetted" job applicants, such as those from WRLP.

Another digital imaging training program customer is the Guilford County Department of Social Services (DSS). DSS was directed by the county to begin digitizing all of its records. Prior to contracting with WRLP, DSS was losing client documents and was so overloaded with paper that the Fire Marshall had fined them for unsafe practices. As a result of the DSS partnership, WRLP trainees who work at DSS under an internship agreement have scanned and cataloged over 1.5 million sheets of

paper since July 2010. Over the past two years, Guilford County DSS has hired 11 former interns, and eight other former interns have secured digital imaging jobs in other organizations.

Recycling Mattresses

A further example of WRLP's approach to workforce development is its partnership with an entrepreneurial venture, Mattress Go Round, which started in June 2011. Mattress Go Round developed a patented process for recycling old mattresses. To succeed, the business needed trained and reliable employees. It developed a relationship with WRLP to help meet this need.

During the first year of the training partnership, Mattress Go Round employed ten individuals who graduated from the WRLP employment training program. They earn an average of \$9.00 per hour and receive full company benefits. With the cohort of employees trained by WRLP, Mattress Go Round now refurbishes nearly 3,000 mattresses per year.

Mattress Go Round's founder had never envisioned hiring ex-offenders to work at his company. However, because WRLP's training program includes developing integrity and good character, he gained trust in his new employees. Over time, Mattress Go Round gave more and more responsibility to its WRLP workers until they were independently loading vehicles; handling keys, cash and credit cards; and traveling over state lines – something the company had not done previously with any employees.

Hotel Work

The WRLP partnership with Quaintance-Weaver Hotels involves helping the hotel maintain its Leadership in Energy and Environmental Design (LEED) certification. The Quaintance-Weaver Hotel company owns the Proximity Hotel in Greensboro, North Carolina, one of the first LEED Platinum Hotels in the United States. In 2010, Reverend Cleveland and his team examined the potential of the hotel and hospitality industry and saw an opportunity to connect job trainees to a stable for-profit industry. Students from WRLP now receive onsite, hands-on training and orientation by the hotel. According to the onsite trainer, the entry-level jobs are a platform from which employees can move up in the company and build a career in hospitality.

Product Distribution Activities

WRLP has also built a robust product distribution program. Companies such as Wal-Mart, Kayser-Roth and Men's Wearhouse donate returned, damaged or slow moving merchandise to WRLP, with the understanding that WRLP processes the product according to the standards provided by the donor. WRLP distributes this product to low-income individuals and organizations that meet the donor's defined needs. WRLP averages about two tractor-trailer loads of merchandise from Wal-Mart each week and four to five tractor-trailer loads a year from Men's Wearhouse.

The Wal-Mart business agreement stemmed from Cleveland contacting Wal-Mart in 2000 to inquire about whether Wal-Mart would be interested in having WRLP redistribute the retailer's damaged goods. As a result, the WRLP warehouse is stocked with merchandise ranging from toiletries to household items. Through WRLP's processing and distribution partnerships, these items now go to organizations and individuals in need instead of into landfills. WRLP also uses the processing and distribution system to develop job skills and a work ethic for its participants, including developmentally disabled adults who work at the warehouse repackaging and sorting merchandise.

In addition, WRLP recycles materials through other partnerships. Through its management of the

Guilford County Teacher Supply Warehouse (TSW), and in partnership with the Guilford Education Alliance and the Guilford County School system, WRLP collects corporate merchandise donations that now benefit over 1,000 teachers a year.

Agency Outcomes

The Welfare Reform Liaison Project's programs and enterprises are replicable. The organization's leadership believes the key to its success is in its training approach described above, which anticipates and addresses the possibility of job attrition due to the multiple obstacles many low-income job seekers face. The program involves a wide range of skills that trainees need in order to get and hold on to jobs.

WRLP program evaluations are conducted by the Sociology Department of North Carolina A&T State University and the Social Work Department of UNC Greensboro. One study noted that WRLP graduates' income tends to rise during their third year of employment. The study determined that individuals began earning promotions to positions such as crew leader or assistant department manager within that time frame. This suggests that WRLP is successful in its efforts to help individuals maintain jobs that lead to long-term prosperity.

WRLP has also documented successes by monitoring the income of almost 250 graduates who have obtained employment. Earnings from January 2000 through March 2012 totaled over \$10,290,000. All income information is verified through pay stubs, tax returns or Employment Security Commission earnings reports.

Between July 2011 and April 2012, 77 program participants obtained employment and 34 WRLP participants' family incomes rose above the poverty level. WRLP uses the United States Department of Health and Human Services Poverty Guidelines, which are based on U.S. Census data for household income, to determine the number of WRLP graduate households moving above poverty.

WRLP provides a proven model for sectoral employment and job training that policymakers can help support and replicate to benefit hard-to-employ workers and provide trained, ready-to-work employees to local businesses in the interest of greater prosperity throughout North Carolina.

Appendix III: Federal Definition of Poverty

How the Federal Government Defines Poverty¹

This appendix summarizes how the federal government currently defines poverty and how it determines whether a household is considered poor. The federal government determines who is in poverty by comparing a household's "*money income*" (explained below) to a set of "*poverty thresholds*" determined and updated annually by the Census Bureau.

Poverty Thresholds

The Census Bureau uses *poverty thresholds* to determine poverty status. Poverty thresholds are dollar amounts that take into consideration family size and composition (the age of family members) to determine who is in poverty in a given household (see Tables 1 and 2). The same thresholds are used throughout the United States. They do not vary geographically and do not take into account cost of living differences or other differences throughout the country. The national thresholds are updated annually for inflation using the CPI-U (Consumer Price Index for All Urban Consumers) for all adjustments. As the Tables illustrate, there is a different poverty threshold for individuals who live alone or with unrelated others in a household.

Money Income

The Census Bureau uses *money income* to set the poverty thresholds. Money income *includes*:

- Pre-tax wages and other earnings;
- Unemployment compensation;
- Workers' compensation;
- Social Security;
- Supplemental Security Income;
- Public assistance that comes to the family as cash;
- Veterans' payments;
- Survivor benefits;
- Pension or retirement income;
- Interest, dividends, rents, royalties;
- Income from estates, trusts;
- Educational assistance; and
- Alimony, child support, other miscellaneous sources that come as cash.

Money income *does not include*:

- *Income from capital gains;*
- *Noncash benefits such as public housing;*
- *Housing subsidies;*
- *Medicaid;*
- *Food stamps;*
- *Unreported income; and*
- *Any other noncash benefits.*

¹The primary source for this appendix is the U.S. Census Bureau. The document also uses a sample household poverty calculation from the National Poverty Center at the University of Michigan.

Table 1. 2010 Poverty Thresholds, Selected Family Compositions

Single Individual	Under 65 years	\$ 11,344
	65 years & older	\$ 10,458
Single Parent	One child	\$ 15,030
	Two children	\$ 17,568
Two Adults	No children	\$ 14,602
	One child	\$ 17,552
	Two children	\$ 22,113
	Three children	\$ 26,023

Example

Family A has four members: a mother, a father and two children, all living in the same household. The family's poverty threshold, based on family size and age composition, was \$22,113 in 2010. Suppose the members' incomes in 2010 were:

Mother	\$10,000
Father	\$17,000
First Child	\$0
Second Child	\$0
Total Family Income	\$27,000

If a family's *money income* is less than the threshold for that family's size and composition, then every individual in the family is considered in poverty as long as they are living in the same household. Since Family A's income (**\$27,000**) was *greater* than their threshold (**\$22,113** – see Table 1), Family A is not "in poverty" according to the official definition.

At times, the federal government uses two additional terms: ***Ratio of Income to Poverty*** and ***Income Deficit/Income Surplus*** to describe the degree to which an individual or a group of individuals are living in poverty.

Ratio of Income to Poverty is computed by dividing money income by the poverty threshold. Family A's ratio of income to poverty was **1.22**. $\text{Income/Threshold} = (\$27,000 / \$22,113 = 1.22)$. In this case the family income is **22 percent above the poverty threshold**.

Income Deficit/Income Surplus is the difference in dollars between a family's money income and the family's poverty threshold. **Income Deficit** applies to families in poverty. **Income Surplus** applies to families not in poverty. Family A's income surplus was **\$4,887**. $\text{Income surplus} = (\$27,000 - \$22,113 = \$4,887)$. In this case the family income is **\$4,887 above the poverty threshold**.

Some state and federal programs use the *Ratio of Income to Poverty* to determine eligibility for various programs like Medicaid and other kinds of assistance. Government assistance programs, however, do not have to use the official poverty measure as eligibility criteria. Many use it as a benchmark for eligibility. For example, in North Carolina, a pregnant woman seeking Medicaid is not eligible if her monthly family income is over 185 percent of the federal poverty level (<http://www.ncdhhs.gov/dma/medicaid/families.htm>).

People Whose Poverty Status Cannot Be Determined

It is not possible to determine the poverty status of certain individuals. This is important for North Carolina and other states because poverty measurement data may not capture all poor people in areas where certain conditions apply. As a result, the poverty rate in a particular area may be higher or lower than the data indicates. Situations where an accurate measure of poverty may not be possible to determine are institutional group living quarters such as prisons, nursing homes, college dormitories and military barracks. Moreover, since the Census Bureau does not ask people under age 15 questions about income, if they are not living with a family member (such as foster children), the government excludes them from poverty calculations.

A Note About Supplemental Poverty Measures

The federal government established the current official poverty measure in the 1960's. Since then, experts inside and outside government have discussed and examined the appropriateness of the original measure and whether it accurately reflects poverty. The most recent developments include the 2009 formation of the Interagency Technical Working Group on Developing a Supplemental Poverty Measure and the Supplemental Poverty Measure Initiative, which proposed a supplemental measure. This measure would consider a household's income and resources differently than the current measure and would be an alternative to, not a replacement for, the current official measure. Additional information is available at <http://www.census.gov/hhes/povmeas/>.

While there is debate about whether the current, long-standing official measure of poverty in the U.S. is appropriate given today's household and family conditions, there is agreement about the overall

importance of measuring poverty. This is true for a range of reasons linked to critical policymaking decisions at the federal, state and local levels. Knowing whether individual households are poor, as well as knowing the extent of poverty in larger areas, contributes to knowledge about those areas' resources and needs, which in turn have impacts on policy.

For a brief history of the poverty measure, see *The Development and History of the U.S. Poverty Thresholds – A Brief Overview* by Gordon M. Fisher (<http://aspe.hhs.gov/poverty/papers/hptgssiv.htm>).

Table 2. Poverty Thresholds for 2010 by Size of Family and Number of Related Children Under 18 Years										
Size of Family Unit	Weighted Average	Related children under 18 years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or more
One person (unrelated individual)	11,139									
Under 65 years	11,344	11,344								
65 years and over	10,458	10,458								
Two people	14,218									
Householder under 65 years	14,676	14,602	15,030							
Householder 65 years and over	13,194	13,180	14,973							
Three people	17,374	17,057	17,552	17,568						
Four people	22,314	22,491	22,859	22,113	22,190					
Five people	26,439	27,123	27,518	26,675	26,023	25,625				
Six people	29,897	31,197	31,320	30,675	30,056	29,137	28,591			
Seven people	34,009	35,896	36,120	35,347	34,809	33,805	32,635	31,351		
Eight people	37,934	40,146	40,501	39,772	39,133	38,227	37,076	35,879	35,575	
Nine people or more	45,220	48,293	48,527	47,882	47,340	46,451	45,227	44,120	43,845	42,156

Source: U.S. Bureau of the Census. Accessed April 26, 2012. <http://www.census.gov/hhes/www/poverty/data/threshld/index.html>.

Appendix IV: Recent Legislative Work

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Summary of Policies Addressing Employment and Poverty at the State Level

In 2011-12, state legislatures across the United States initiated and continued to support a wide variety of policies related to job creation and poverty alleviation. For example, several of North Carolina’s regional neighbors have implemented policies related to workforce development and career academies (Tennessee, Georgia and Mississippi). The legislature in Mississippi, a state with some of the highest county-level poverty rates in the nation, has been particularly active in developing legislation intended to create jobs and alleviate poverty. Also of note is Massachusetts’ Pathways Out of Poverty Grant Program, which supports job training programs through strategies such as career coaching.

In addition to implementing policies that address employment and poverty, several state legislatures have commissioned task forces to study the nature of poverty in their state and offer specific policy recommendations (Mississippi, Hawaii and Colorado). Recently, several legislatures have debated who qualifies for poverty related programs.

The tables below provide a brief overview of policies implemented by state legislatures in the past year that have some bearing on those in poverty. As there are many policies that impact the impoverished, this list of state-level policies is meant to be foundational, not exhaustive, and supports the other ideas discussed in this briefing report. Policy categories include, in the order that they appear below:

- Workforce development;
- Career academies;
- Early education; and
- Other legislation related to poverty and employment.

WORKFORCE DEVELOPMENT			
State	Sessions	POLICY: LEGISLATIVE ACTION	Status
IL	2011-2012	HOUSE BILL 2927: WORKFORCE DEVELOPMENT This bill amends the Emergency Employment Development Act, which provides that specified programs serve the economically disadvantaged, including a list of child care providers. It provides that an employer may not terminate, lay off or reduce the working hours of an employee in order to hire an individual with funds available under the Act.	Signed into law August 26, 2011

MA	2011-2012	HOUSE BILL 2871: GED PROGRAMS AND WORKFORCE DEVELOPMENT This bill relates to investment in programs that support youth employment and provide disadvantaged youth with job skills and training, as well as remedial education or placement in a GED program.	Sent to committee
MS	2011-2012	HOUSE BILL 222: DISADVANTAGED SMALL BUSINESSES This bill establishes the Opportunities for Diversity in Contracting (ODC) program administered by the Mississippi Development Authority. It serves to increase the number of socially and economically disadvantaged small businesses that do business with the state by facilitating and improving access to government contracts.	Sent to committee

CAREER ACADEMIES			
State	Sessions	POLICY: LEGISLATIVE ACTION	
GA	2011-2012	SENATE BILL 161: CAREER ACADEMIES This bill relates to technical and adult education at colleges and career academies. It establishes an Office of College and Career Transitions and encourages partnerships with postsecondary institutions to establish college and career academies as charter schools. The bill provides funding for certification, data collection, eligibility criteria management, operational procedures and annual reporting.	Signed into law May 11, 2011
MS	2011-2012	HOUSE BILL 199: CAREER ACADEMIES IN GRADES 9-12 This bill requires the State Department of Education and the Board of Trustees of State Institutions of Higher Learning to establish and implement a program known as the Health Careers Academy for Public School Students in grades 9 through 12. The purpose of the academies is to stimulate interest in science, mathematics, language arts, critical thinking and health care professions. It requires academies to conduct six-week nonresidential summer programs at the University of Mississippi.	Sent to committee
NE	2011-2012	LEGISLATIVE BILL 58: CAREER ACADEMIES STUDY This bill requires a study of dual-enrollment courses and career academies.	Indefinitely postponed
TN	2011-2012	HOUSE BILL 2415: CAREER ACADEMIES PILOT PROGRAMS This bill continues the career and technical class size extension pilot project in the Metro Nashville public schools. It requires that the pilot only be used in schools or programs implementing a career academy.	Signed into law March 22, 2012

EARLY EDUCATION			
State	Sessions	POLICY: LEGISLATIVE ACTION	
AZ	2011-2012	<p>HOUSE BILL 2010: EARLY INTERVENTION PROGRAMS FOR THOSE IN POVERTY</p> <p>This bill relates to early intervention programs for children and toddlers with developmental delays. It also requires a parent/guardian to pay a percentage of the costs if family income is above the federal poverty guidelines.</p>	Sent to committee
CT	2011-2012	<p>HOUSE BILL 5004: SCHOOL READINESS PROGRAM FOR CHILDREN BELOW THE POVERTY LEVEL</p> <p>This bill increases the number of children who are prepared for kindergarten by allowing poor children to attend prekindergarten programs at no cost.</p>	Sent to committee
MA	2011-2012	<p>HOUSE BILL 2675: PRESCHOOL PROGRAMS FOR DISADVANTAGED FAMILIES</p> <p>This bill encourages low-income disadvantaged families to make progress toward long-term economic success. It enables shared databases between public and private support services, including monitoring of eligible participants such as Head Start and afterschool programs.</p>	Sent to committee
MA	2011-2012	<p>SENATE BILL 54: CHILDREN IN POVERTY ASSESSMENTS</p> <p>This bill requires that agencies serving children and families conduct an annual child assessment on the impact of the public welfare system on the health and well-being of the children and youth being served (birth through age 18).</p>	Sent to committee
VT	2011-2012	<p>SENATE BILL 218: PREKINDERGARTEN EDUCATION FOR CHILDREN IN POVERTY</p> <p>This bill proposes to increase state subsidies to child care programs offering high-quality, non-school-based prekindergarten education for children in poverty.</p>	Sent to committee

LEGISLATION RELATED TO POVERTY AND EMPLOYMENT			
State	Sessions	POLICY: LEGISLATIVE ACTION	
HI	2011-2012	HOUSE BILL 1317: RELATIONS WITH CONTRACTORS This bill requires that the wage employees of a contractor providing services to the State of Hawaii be paid no less than the prorated hourly equivalent of the annual income necessary to meet or surpass the poverty threshold.	Postponed until 2012 session
MS	2011-2012	HOUSE BILL 547: INFRASTRUCTURE PROJECTS AND POVERTY This bill requires the Mississippi Development Authority (MDA) to conduct a yearly study and provide a legislative report that identifies the public infrastructure conditions and needs of certain counties with the highest percentages of poverty within the state.	Sent to committee
MS	2011-2012	HOUSE CONCURENT RESOLUTION 37 This bill acknowledges the state of poverty in the state of Mississippi and recognizes the state's 20 poorest counties and their impact on the overall status of the state. It encourages the improvement of their economic viability through increased awareness and creation of opportunity by emphasizing the importance of the inter-relationships between all 82 counties as it relates to the social and economic conditions in the state of Mississippi.	Passed
NM	2011-2012	SENATE BILL 126: EDUCATION FUNDING AND HIGH POVERTY SCHOOLS This bill makes an appropriation to the Public Education Department to provide teaching support in schools with high concentrations of poverty.	Action postponed indefinitely
NY	2011-2012	ASSEMBLY BILL 1117: MICRO-ENTERPRISES FOR THOSE IN POVERTY This bill establishes the Micro-Enterprise Development Act to assist very small businesses and low-income business people in economically distressed communities. It establishes a grant program for micro-enterprise technical assistance; mandates an annual appropriation of no less than one million dollars; and establishes that the organizations receiving funding shall use the grants to provide training and technical assistance to micro-enterprise entrepreneurs with incomes that are not more than 150% of the poverty line.	Sent to committee

NY	2011-2012	<p>ASSEMBLY BILL 2555: FAMILY LITERACY PROGRAMS FOR THOSE IN POVERTY</p> <p>This bill establishes family literacy programs for economically disadvantaged families living areas with high poverty or areas with low-performing public schools. It provides for competitive matching grants to establish comprehensive literacy programs. It also requires the commissioner of education to submit an annual report to the governor and legislature.</p>	Sent to committee
NY	2011-2012	<p>ASSEMBLY BILL 4890: PROPERTY TAX CAP FOR THOSE IN POVERTY</p> <p>This bill provides a real property tax cap for qualifying retired senior citizens living on a fixed income that is below 300% of the federal poverty guidelines. It requires that, as of the qualifying date, real property taxes shall not increase.</p>	Sent to committee
NY	2011-2012	<p>ASSEMBLY BILL 7236: AUTOMOBILE RESOURCE LIMITS</p> <p>This bill enables a tax exemption to be given to applicants and recipients of public assistance who own an automobile. The tax exemption is meant to be practical and fair to those individuals who depend on their cars to lift themselves out of poverty.</p>	Sent to committee
OK	2011-2012	<p>SENATE BILL 103: INCOME TAX EXEMPTIONS FOR IMPOVERISHED WIDOWS</p> <p>This bill provides an income tax exemption for certain surviving spouses whose income is at or below 200% of the federal poverty level.</p>	Sent to committee
PA	2011-2012	<p>SENATE BILL 85: INCOME TAX MODIFICATIONS FOR THOSE IN POVERTY</p> <p>This bill amends the Tax Reform Code of 1971 regarding personal income tax. It provides for special tax provisions for those in poverty.</p>	Sent to committee
RI	2011-2012	<p>HOUSE BILL 5206: CHILD CARE ASSISTANCE CONDITIONED ON EMPLOYMENT</p> <p>This bill allows people initially eligible for child care assistance to remain eligible as long as their income does not exceed 255% of the federal poverty level, and as long as child care is necessary in order to maintain employment.</p>	Sent to committee
RI	2011-2012	<p>SENATE BILL 323: INCOME FLUCTUATION AND PAID EMPLOYMENT</p> <p>This bill would prevent the interruption in paid employment for parents receiving child care subsidies whose income fluctuates between 180% and 225% of the federal poverty level.</p>	Sent to committee

UT	2011-2012	<p>SENATE BILL 37: DATA MONITORING OF INTERGENERATIONAL POVERTY</p> <p>This bill modifies the Utah Workforce Services Code by enacting the Intergenerational Poverty Mitigation Act to monitor data related to intergenerational poverty. It requires the Department of Workforce Services to establish and maintain a system to track intergenerational poverty related data to identify at-risk children and other groups, identify trends, and to assist case workers, social scientists and government officials to study and develop plans and programs to assist individuals and families.</p>	Signed into law March 19, 2012
VA	2011-2012	<p>HOUSE BILL 1811: TANF RECIPIENTS</p> <p>This bill directs the Department of Social Services to identify strategies to increase reimbursement rates for child care services for TANF recipients and families whose incomes are at or below 185% of the federal poverty level to an amount comparable to the goal identified by the U.S. Department of Health and Human Services. It directs the Department to develop criteria for determining an appropriate local match for funds available for child care services for such TANF recipients and families.</p>	Sent to committee
VA	2011-2012	<p>SENATE BILL 241: TAX CREDIT FOR DONATIONS RELATING TO EDUCATION IMPROVEMENT SCHOLARSHIPS</p> <p>This bill relates to assistance provided to low-income families and scholarships for K-12 students attending private schools. It establishes a tax credit beginning in 2012 for businesses making donations to non-profit organizations that offer scholarships to students in poverty.</p>	Sent to committee

Appendix V: Organizational Resources

The resources included here complement the bibliography found in Appendix VIII. They reflect the wide range of employment-related poverty alleviation resources and efforts in North Carolina and beyond. This listing is not comprehensive and inclusion in this report does not signal endorsement by the North Carolina Family Impact Seminar. All information comes from the organizations' websites with minimal editing for clarity and consistency.

Action for Children NC: Action for Children NC is a statewide, independent, nonpartisan, nonprofit child advocacy organization dedicated to educating and engaging all people across the state to ensure that children are healthy, safe, well-educated and have every opportunity for success. It provides news, reports and resources on issues affecting the well-being of *North Carolina's children* with special emphasis on child abuse, health care, education and economic security. <http://www.ncchild.org/issue/economic-security>

Brookings Institution: The Brookings Institution is a nonprofit public policy organization based in Washington, DC. Its mission is to conduct high-quality, independent research and, based on that research, provide innovative, practical recommendations that advance three broad goals:

- Strengthen American democracy;
 - Foster the economic and social welfare, security and opportunity of all Americans; and
 - Secure a more open, safe, prosperous and cooperative international system.
- <http://www.brookings.edu>

Bureau of Labor Statistics (BLS): BLS is part of the U.S. Department of Labor. It collects, processes, analyzes and disseminates data relating to employment, unemployment, the labor force, productivity, prices, family expenditures, wages, industrial relations, and occupational safety and health. Data released by the BLS include: the Consumer Price Index, the Producer Price Index, the unemployment rate, and nonagricultural employment levels.

<http://www.bls.gov/>

Bureau of the Census (BOC): The BOC is part of the U.S. Department of Commerce. This agency conducts the censuses of population and housing every ten years and of agriculture, business, governments, manufacturers, mineral industries and transportation every five years. The Census Bureau also conducts the monthly Current Population Survey (CPS) in cooperation with the Bureau of Labor Statistics (BLS). Data from this survey are the source of unemployment statistics. <http://www.census.gov/>

Center for Employment Security Education and Research (CESER): CESER is an education, research and information technology center focused on workforce development and unemployment insurance issues. CESER offers its broad range of research, training, consulting and information technology services to a diverse group of stakeholders with an interest in workforce issues, most notably state workforce agencies and their federal partners. CESER products help promote and strengthen workforce development activities, which are critical components of our nation's economic development efforts. <http://www.workforceatm.org/about/index.cfm?action=cesper>

Current Employment Statistics (CES): The Bureau of Labor Statistics produces CES statistics based on a monthly survey of nonfarm business establishments. The numbers include wage and salary employment, worker hours and payroll by industry, and area statistics. Through a federal/state cooperative effort, these data are used to compute current monthly employment, hours and earnings estimates (by industry) for the nation, the 50 states and the District of Columbia, and over 250 Metropolitan Areas. <http://www.bls.gov/ces/home.htm>

Current Population Survey (CPS): The Census Bureau conducts the CPS, a monthly household survey of the civilian noninstitutional population of the United States. The survey provides monthly statistics on employment, unemployment and related subjects. The data are analyzed and published each month by the Bureau of Labor Statistics. <http://www.census.gov/cps/>

North Carolina Dislocated Worker Program (DWP): The North Carolina DWP program is funded through the Workforce Investment Act. It provides skills upgrading and retraining. Training services may include:

- Occupational skills training, including non-traditional training;
- Workplace training with related instruction, which may include Cooperative Education Programs;
- Skills upgrading and retraining;
- Entrepreneurial training;
- Adult education and literacy activities in combination with training activities listed;
- On-the-job training; and
- Career Readiness Certification.

<http://sectc.nc.gov/Training/DislocatedWorkerProgram.aspx>

Fair Labor Standards Act (FLSA): The FLSA establishes minimum wage, overtime pay, recordkeeping and youth employment standards affecting employees in both the public and private sectors. Covered nonexempt workers are entitled to a minimum wage of not less than \$7.25 per hour effective July 24, 2009. Overtime pay at a rate not less than one and one-half times the regular rate of pay is required after 40 hours of work in a workweek. <http://www.dol.gov/whd/flsa/>

Georgetown Center on Poverty, Inequality, and Public Policy at Georgetown University: The Georgetown Center on Poverty, Inequality, and Public Policy provides a forum in which researchers, policymakers and others can explore and develop effective public policy responses to poverty and inequality in the United States. Specifically, the Center seeks to promote workforce development policies and programs as an anti-poverty strategy. The Center's workforce development policy efforts focus on identifying promising state and federal policies, programs and practices, and on promoting the evaluation, continuation and expansion of such efforts. The Center is also working to expand public discourse on career and technical education pathways that will prepare workers for middle-skill, well-paying jobs. <http://www.law.georgetown.edu/povertyandinequality/index.htm>

Industrial Extension Service (IES) at N.C. State University: The IES is the arm of North Carolina State University that supports North Carolina business in the workplace – in the office, on the factory floor or in the hospital. It helps companies stay abreast of the latest technologies and best practices in both engineering and business management. It aims to help businesses increase productivity, efficiency, quality and, as a result, profits. Its toolbox includes lean enterprise and quality initiatives such as ISO management systems and Six Sigma and environmental, safety and health management. In an independent survey, clients reported that IES services have been worth more than \$500 million to North Carolina. By the end of 2009, IES claimed \$1 billion in wealth generation for the state in a campaign

called 1B4NC. In 2010, it celebrated manufacturing with the *Manufacturing Makes It Real* tour, a statewide bus tour with a tractor trailer full of donated "Made in NC" items. <http://www.ies.ncsu.edu/>

Institute for Research on Poverty (IRP): IRP is a center for interdisciplinary research into the causes and consequences of poverty and social inequality in the United States. It is nonprofit and nonpartisan and is based at the University of Wisconsin-Madison. As one of three National Poverty Research Centers sponsored by the U.S. Department of Health and Human Services, it has a particular interest in poverty and family welfare in Wisconsin as well as the nation. <http://www.irp.wisc.edu/aboutirp.htm>

Local Area Unemployment Statistics (LAUS): A program of the federal Bureau of Labor Statistics, LAUS is a federal/state cooperative program which produces employment, labor force and unemployment estimates for states and local areas. <http://www.bls.gov/lau/home.htm>

Manufacturing Extension Project (MEP): The National Institute of Standards and Technology's Hollings Manufacturing Extension Partnership (MEP) works with small and mid-sized U.S. manufacturers to help them create and retain jobs, increase profits, and save time and money. The nationwide network provides a variety of services, from innovation strategies to process improvements to green manufacturing. MEP also works with partners at the state and federal levels on programs that put manufacturers in position to develop new customers, expand into new markets and create new products. <http://www.nist.gov/mep/about.cfm>

Mass Layoff Statistics Program (MLS): The MLS program is a federal/state cooperative statistical effort of the Bureau of Labor Statistics that collects reports on mass layoff actions that have resulted in workers being separated from their jobs. Monthly mass layoff numbers are from establishments which have at least 50 initial claims for unemployment insurance (UI) filed against them during a five-week period. Extended mass layoff numbers (issued quarterly) are from a subset of such establishments where private sector nonfarm employers indicate that 50 or more workers were separated from their jobs for at least 31 days. <http://www.bls.gov/mls/>

MDRC: MDRC is a nonprofit, nonpartisan policy education and social policy research organization dedicated to learning what works to improve programs and policies that affect the poor. It designs and studies new approaches to problems confronting public education: low-income children, families and community; and low-wage workers and people with serious barriers to employment. <http://www.mdrc.org>

National Association of Manufacturers (NAM): NAM is an association of U.S. manufacturers and is the nation's largest industrial trade association. It represents small and large manufacturers in every industrial sector and in all 50 states. Manufacturing in the U.S. employs nearly 12 million workers. <http://www.nam.org/About-Us/About-the-NAM/US-Manufacturers-Association.aspx>

National Association of State Workforce Agencies (NASWA): NASWA was founded in 1935 in the early years of unemployment insurance and employment service programs. It is an organization of state administrators of unemployment insurance laws, employment services, training programs, employment statistics and labor market information. NASWA strives to strengthen the workforce system through information exchange, liaison and advocacy. <http://www.naswa.org/about/index.cfm?action=home>

National Association of Workforce Boards (NAWB): NAWB represents business-led Workforce Investment Boards (WIBs) that coordinate and leverage workforce strategies with education and economic development stakeholders within their local communities to ensure that state and local workforce development and job training programs meet the needs of employers. NAWB works closely

with policymakers in Washington, DC, to inform national strategy as it relates to WIBs and NAWB's partners in education, economic development, labor and business. http://www.nawb.org/about_us.asp

National Poverty Center at The University of Michigan (NPC): The NPC, located at the Gerald R. Ford School of Public Policy at the University of Michigan, was established in the fall of 2002 as a university-based, nonpartisan research center. It is one of three national poverty centers. It conducts and promotes multidisciplinary, policy-relevant research, mentoring and training of emerging scholars, and it informs public discourse on the causes and consequences of poverty. The NPC:

- Awards research grants to emerging scholars;
- Conducts large-scale research projects, including the Michigan Recession and Recovery Study (MRRS);
- Mentors visiting scholars and postdoctoral fellows;
- Trains individuals on poverty research and data analysis;
- Engages nearly 200 research affiliates from institutions across the country;
- Coordinates and presents at national seminars, conferences and policy forums;
- Disseminates over 200 working papers and policy briefs; and
- Publishes edited volumes highlighting NPC-supported poverty research.

<http://www.npc.umich.edu/>

North Carolina Community Development Initiative (NCCDI): The nonprofit NCCDI was created in 1994 to serve as a knowledgeable intermediary to strategically invest funds from many sources in the work of community development organizations across the state. The Initiative collaborates with public, private, academic and nonprofit partners to create economic growth in the state's poorest and most distressed communities. By strengthening and revitalizing these communities, NCCDI strives to strengthen the state's economy overall. The Initiative and its lending subsidiary, Initiative Capital, catalyze community development through the strategies of financial investments, innovation and leadership development. <http://ncinitiative.org/>

North Carolina Division of Workforce Solutions (NCDWS): NCDWS is the state administrative entity that receives grant funds under the federal Workforce Investment Act. Comprised of partner organizations including the Department of Commerce and the Community College System, the Division's responsibilities include staffing and support of the N.C. Commission on Workforce Development. <http://www.nccommerce.com/wf/about-us>

North Carolina Industrial Commission (NCIC): The NCIC administers a number of state acts, including the Workers' Compensation Act. <http://www.ic.nc.gov/>

North Carolina Justice Center: The North Carolina Justice Center is an advocacy and research organization. Its mission is to end poverty in North Carolina by ensuring that every household has access to the resources, services and fair treatment it needs to achieve economic security. The Justice Center works to improve the lives of low- and moderate-income North Carolinians through five main strategies: litigation, analysis, advocacy, community education and communication. The Center is a 501c3 nonprofit organization that is funded through private donations and grants. <http://www.ncjustice.org/?q=node/1>

North Carolina Rural Economic Development Center (The Rural Center): The Rural Center's New Generation Initiative is a three-year, \$3.6 million effort to transform rural communities through youth and young adult engagement. Encompassing four distinct programs, it offers opportunities in entrepreneurship development, on-the-job training, leadership development and community service.

The Rural Center has awarded 53 grants totaling \$8.6 million to create jobs, provide clean water and assist with economic development in rural NC counties. The grants will create 894 jobs and aid projects in 31 counties. Its mission is to develop, promote and implement sound economic strategies to improve the quality of life of rural North Carolinians. It serves the state's 85 rural counties, with a special focus on individuals with low to moderate incomes and communities with limited resources. The Rural Center is a private, nonprofit organization funded by both public and private sources and led by a 50-member board of directors. <http://www.ncruralcenter.org/>

Policy Institute for Family Impact Seminars (PINFIS): PINFIS aims to strengthen family policy by connecting state policymakers with research knowledge – and researchers with policy knowledge. The Institute provides nonpartisan, solution-oriented research and a family impact perspective on issues being debated in state legislatures. The North Carolina Family Impact Seminar initiative is part of the national PINFIS network of over twenty states.

Recent Family Impact Seminars pertaining to jobs and poverty include:

North Carolina Family Impact Seminar 2012
Working Toward Greater Prosperity in North Carolina: Effective Employment Strategies
<http://www.childandfamilypolicy.duke.edu/engagement/ncfis.php>

Iowa Family Impact Seminar 2012
Bringing Families Out of Poverty
<http://www.familyimpactseminars.org/index.asp?p=2&page=seminar&seminarid=224&siteid=16>

Wisconsin Family Impact Seminar 2011
Positioning Wisconsin for the Jobs of the Future
<http://www.familyimpactseminars.org/index.asp?p=1&page=seminar&seminarid=218&siteid=50>

Louisiana Family Impact Seminar 2011
Evidence-Based Solutions to Poverty: Nurse-Family Partnership Home Visitation Program
<http://www.familyimpactseminars.org/index.asp?p=1&page=seminar&seminarid=219&siteid=19>

Illinois Family Impact Seminar 2009
Helping Illinois' Families in Economic Crisis
<http://www.familyimpactseminars.org/index.asp?p=1&page=seminar&seminarid=187&siteid=14>

Spotlight on Poverty and Opportunity: A nonpartisan initiative, Spotlight on Poverty and Opportunity brings together diverse perspectives from the political, policy, advocacy and foundation communities to find genuine solutions to the economic hardship confronting millions of Americans. Through the ongoing exchange of ideas, research and data, the organization seeks to inform the policy debate about reducing poverty and increasing opportunity in the United States. Spotlight on Poverty and Opportunity was launched in October 2007 by major U.S. foundations to foster nonpartisan debate about policy approaches for addressing poverty and opportunity during the 2008 campaign season. <http://www.spotlightonpoverty.org/>

The Stanford Center on Poverty and Inequality (CPI): CPI is one of three National Poverty Centers sponsored by the U.S. Department of Health and Human Services. It is a nonpartisan research center dedicated to monitoring trends in poverty and inequality, explaining what is driving those trends, and developing science-based policy on poverty and inequality. CPI supports research by new and established scholars, trains the next generation of scholars and policy analysts, and disseminates research

on poverty and inequality. <http://www.stanford.edu/group/scspi/>

The UNC Center for Poverty, Work and Opportunity: The Center is a nonpartisan, interdisciplinary institute designed to study, examine, document and advocate for proposals, policies and services to mitigate poverty in North Carolina and the nation. The Center has four goals:

- To address the pressing needs of those currently living at or below the poverty level in North Carolina;
- To provide an interdisciplinary forum to examine innovative and practical ideas to move more men, women and children out of poverty;
- To raise public awareness of issues related to work and poverty; and
- To train a new generation to combat the causes and effects of poverty and to improve the circumstances of working people.

<http://www.law.unc.edu/centers/poverty/default.aspx>

U.S. Census Bureau Poverty Maps: The U.S. Census Bureau, with support from other federal agencies, created the Small Area Income and Poverty Estimates (SAIPE) program to provide more current estimates of selected income and poverty statistics than those from the most recent decennial census.

Estimates for 2010 were released in November 2011. These estimates combine data from administrative records, intercensal population estimates and the decennial census with direct estimates from the American Community Survey to provide consistent and reliable single-year estimates. These model-based, single-year estimates are more reflective of current conditions than multi-year survey estimates. <http://www.census.gov/did/www/saipe/data/statecounty/data/2010.html>

Welfare Reform Liaison Project (WRLP): The WRLP is a nonprofit faith-based organization located in Greensboro, North Carolina. WRLP promotes self-sufficiency for low-income families through employment training, product distribution, skills development and placement. <http://www.wrlp.net/>

Appendix VI: Glossary and Relevant Terms

This glossary includes definitions of terms related to jobs, workforce development and poverty, as well as other terms used in this briefing report. This list has been developed in conjunction with the 2012 Family Impact Seminar and is not comprehensive.

Unless otherwise indicated, the terms and definitions included here are adapted from the Pittsburgh Partnership Workforce Development Glossary, which itself stems from multiple sources.¹

Alternative Measures of Poverty: In 2010, an Interagency Technical Working Group issued a series of suggestions to the Census Bureau and Bureau of Labor Statistics regarding how to develop a Supplemental Poverty Measure. The official federal government poverty measure estimates poverty rates by looking at a family's cash income. The new measure is a more complex statistic incorporating additional items such as tax payments and work expenses in its family resource estimates. Thresholds used in the new measure are derived from Consumer Expenditure Survey data on expenditures involving basic necessities (food, shelter, clothing and utilities) and is adjusted for geographic differences in housing costs. The new measure serves as an additional indicator of economic well-being and provides a deeper understanding of economic conditions and policy effects. (Source: Census Bureau) See Appendix III.

Apprenticeship: A structured approach for entering a skilled occupation in most of the major trade industries. Apprenticeship combines on-the-job training with related supplemental classroom instruction.

Assessment: A systematic process of measuring the strengths and weaknesses of workforce development clients. A wide range of assessment instruments and methods is available, from structured interviews to computerized tests.

Basic Skills Training: Training offered individually or in groups to help individuals improve fundamental academic skills, such as reading, writing and basic math.

Career Academies: Career Academies are career preparation programs operating in high schools. They offer career-related curricula tied to a specific career path, including academic coursework, as well as work experience through partnerships with local employers.

http://ies.ed.gov/ncee/wwc/pdf/intervention_reports/WWC_Career_Academies_100506.pdf

Career Development: Career development refers to “the outcome of actions on career plans as viewed from both individuals and organizational perspectives.” The outcomes desired by individuals range from increased status to job flexibility to monetary rewards, depending on the situation. Organizations’ desired outcomes include achieving the best match between people and jobs.

Census: A complete count of a specified population or some measurable characteristics in a given area (e.g., housing, industry, etc.).

Civilian Labor Force: The sum of *civilian* individuals who are 16 years old or older and are either employed or counted as unemployed. This category does not include individuals serving in the military.

Consumer Price Index (CPI): A Bureau of Labor Statistics program which measures the average change in prices of a fixed set of goods and services purchased by households. It is the most commonly recognized measure of inflation. <http://www.bls.gov/cpi/home.htm>

County: The largest territorial division for local government.

Covered Employment and Wages (ES-202) Program: This program produces employment and wage data for workers covered by state unemployment insurance laws and federal workers covered by the Unemployment Compensation for Federal Employees Program. The Employment and Wages (ES-202) Program in North Carolina summarizes data compiled from the Employer's Quarterly Contribution Reports (QCR), Multiple Worksite Reports (MWR) and related sources. Breakouts of employment and wage data are provided by major industry divisions, as well as by two-digit Standard Industrial Classification (SIC) codes, for all industries in the private and public sectors at both the state and county levels. SIC code assignments were created using the 1987 edition of the Standard Industrial Classification Manual that became effective January 1, 1988. <http://www.bls.gov/cew/cewover.htm>

Cyclical Unemployment: A temporary downturn in the job market. The most common form of cyclical unemployment occurs when workers are temporarily laid off.

Demand: In labor market information this term is usually used in reference to the need for workers in a particular occupation, or workers with specific skills.

Demographics: The characteristics of a population such as age, income, ethnicity, etc.

Dislocated Worker: An employee who has been laid off from his/her job because of a business cutback or plant closure.

Discouraged Workers: Individuals who had no employment during the survey week, who want a job, have looked for work during the past year, and are available to work, but did not look for work in the last four weeks because they believed that no jobs were available to them. Discouraged workers are not counted as being part of the labor force. They are not counted as unemployed because they have not made specific efforts to find work during the survey week.

Duration of Unemployment: The length of time during which a person classified as unemployed has been continuously looking for work.

Earned Income Tax Credit (EITC): A federal program which helps to make working more attractive than welfare by offsetting or reducing the federal payroll and income tax burden for low- and moderate-income workers – primarily those with children. For families with incomes so low they do not pay taxes, EITC provides a wage supplement. For eligible families with very low earnings, EITC can increase a family's income from wages by 34 to 40 percent. Workers may either file for a tax refund at the tax filing deadline or select the EITC Advance Payment Option to have a portion of the credit added to each paycheck and receive the remaining lump sum (usually half or more of the credit) at the end of the year. <http://www.irs.gov/individuals/article/0,,id=96456,00.html>

Economic Development: (1) An effort by government or community-based organizations to improve the economic health of an impoverished area through job creation. Typically, such programs aim to entice businesses to relocate in an economic development zone, to improve the occupational and academic skills of local residents and to encourage formation of new businesses. A wide variety of tax credits, hiring subsidies and other incentives may be used. (2) The entire array of activities, some

conducted by government and some by the private sector, often in partnership with government, which are intended to expand the economy of a designated area to increase the number of jobs available to the population of that area.

Economic Indicator: A set of data that serves as a tool for analyzing current economic conditions and future prospects. Usually classified according to their timing in relationship to the ups and downs of the business cycle; that is, whether they lead, coincide with, or lag behind general business conditions.

Emerging Occupations: (1) Occupations newly created as a result of technological innovation, shifting markets or new regulations; or (2) Existing occupations that have undergone substantial modification in skill requirements; or (3) Existing occupations with new opportunities created by changes in legislation, social concerns, demographics, industry or the marketplace.

Employed: Persons aged 16 years or older who are working.

Employer Outreach: An organized effort by a job placement service provider to place its clients in a job with a particular employer. This may involve clients applying for jobs identified by the service provider or service providers who either encourage employers to list job openings with the employment agency or who advocate on behalf of individual clients. Also called "Job Development."

Employment: Jobs, or a measure of the number of people who are working.

Employment Tax Credit: Refers to any of several (mostly state) initiatives designed to entice employers to hire low-income people by reducing corporate or other taxes.

Entry-Level: Jobs or occupations for which employers hire workers with little or no previous work experience or with relatively minimal training or education. Occupations that require more education or training may have specific entry-level classifications such as "apprenticeship" or "internship."

Essential Job Functions: Fundamental job duties of an employment position that an individual with a disability holds or desires.

Extended Benefits: Unemployment benefits payable for up to 13 additional weeks during periods of high unemployment. Extended benefits are payable to individuals who have exhausted their entitlement to regular benefits.

Forecast: To calculate or predict some future event or condition, usually as a result of study and analysis of available pertinent data.

Frictional Unemployment: Occurs when a person voluntarily leaves one job and has not yet begun another job. The worker is voluntarily unemployed and is utilizing his/her right to change jobs.

Full-Time Equivalency (FTE): Full-time equivalent employees equal the number of employees on full-time schedules plus the number of employees on part-time schedules converted to a full-time basis. The number of full-time equivalent employees in each industry is the product of the total number of employees and the ratio of average weekly hours per employee for all employees to average weekly hours per employee on full-time schedules. An industry's full-time equivalent employment will be less than the number of its employees on full- and part-time schedules, unless it has no part-time employees. http://bea.gov/faq/index.cfm?faq_id=368&searchQuery=&start=200&cat_id=0

Full-Time Employment: A person employed 35 or more hours per week (Source: Bureau of Labor Statistics, Current Population Survey).

Hard-to-Employ: Denotes a specific population of individuals with occupational, academic, personal and other barriers that make it particularly difficult for them to find jobs. Examples include people with very low reading skills, people with physical and mental disabilities, long-term welfare recipients, ex-offenders, the homeless, substance abusers and the long-term unemployed. Many workforce development programs directly target such individuals.

Household: A household consists of all the people who occupy a housing unit. A house, an apartment or other group of rooms, or a single room is regarded as a housing unit when it is occupied or intended for occupancy as separate living quarters; that is, when the occupants do not live with any other persons in the structure and there is direct access from the outside or through a common hall. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household (Source: Census Bureau).

Income: Income before taxes is the total money earnings and selected money receipts of all consumer unit members aged 14 years or older during the 12 months prior to the interview date. It includes the following components: wages and salaries; self-employment income; Social Security, private and government retirement; interest, dividends, rental income and other property income; unemployment, workers' compensation and veterans' benefits; public cash assistance, supplemental security income and food stamps; regular contributions for support (including alimony and child support); other income (including cash scholarships, fellowships or stipends not based on working, and meals and rent as pay) (Source: Bureau of Labor Statistics).

Income Deficit: Income deficit is the number of dollars that the income of a family in poverty (or an unrelated individual) falls below its poverty threshold. If income is negative, the deficit equals the threshold (Source: Census Bureau).

Income Surplus: Income surplus is the difference in dollars between the income of a family or unrelated individual above the poverty level and its poverty threshold (Source: Census Bureau).

Job Bank: A list of available job openings.

Job Search Assistance: A category of employer outreach that includes (1) offering training to help clients find their own jobs (self-directed job search); (2) providing job leads for clients; and (3) offering on-the-job training.

Job Training Partnership Act (JTPA): JTPA is a job training program that is federally funded. The purpose of JTPA is to prepare youth and adults facing serious barriers to employment by providing job training and other services that will result in increased employment. Many JTPA locations exist across North Carolina.

Labor Market Area (LMA): An economically integrated geographic area within which individuals can reside and find employment within a reasonable distance or can readily change employment without changing their place of residence (Source: U.S. Department of Labor, Bureau of Labor Statistics-January 2001).

Labor Force: The sum of individuals who are 16 years old or older and are either employed or counted as unemployed, including persons in the military.

Life Skills Training: A form of pre-employment training that prepares job seekers who have few job skills or little workplace experience. It provides job seekers with information on what it takes to be hired and to keep a job. Typical components in this training include the importance of a strong work ethic, punctuality and reliability, a positive attitude, dressing for success, effective interview techniques, budgeting, conflict resolution and how to get along with supervisors and co-workers.

Long-Term Unemployment: Persons who have been unemployed for 27 or more consecutive weeks.

Manufacturing Extension Partnership: In North Carolina this is referred to as Industrial Extension Service. The Hollings Manufacturing Extension Partnership (MEP) works with small and mid-sized U.S. manufacturers to help them create and retain jobs, increase profits, and save time and money. As a program of the U.S. Department of Commerce, MEP offers its clients a wealth of unique and effective resources centered on five critical areas: technology acceleration, supplier development, sustainability and workforce improvement. MEP also works with partners at the state and federal levels on programs that put manufacturers in position to develop new customers, expand into new markets and create new products. <http://www.nist.gov/mep/about.cfm>

Mean Income: Mean (average) income is the amount calculated by dividing the total income of a group by the number of units in that group (Source: Census Bureau).

Median Income: Median income is the income level which divides the income distribution into two equal groups: half having incomes above the median; half having incomes below the median (Source: Census Bureau).

Not in the Labor Force: All persons in the civilian noninstitutional population who are neither employed nor counted as unemployed are considered "not in the labor force."

Occupational Skills: Skills needed to practice a particular occupation or career. Typically these are "hard skills" (such as welding) rather than "soft skills" (such as punctuality). Also called "Vocational Skills."

On-The-Job Training: A type of vocational training in which the trainee learns skills at the work site while earning a wage. Often, employers are offered cash training reimbursements or other incentives to hire hard-to-employ people and train them on the job.

Poverty: Following the Office of Management and Budget's (OMB's) Directive 14, the Census Bureau uses a set of money income thresholds that vary by family size and composition to determine who is considered to be poor. If a family's total income is less than that family's threshold, then that family, and every individual in it, is considered to be poor. The poverty thresholds do not vary geographically, but they are updated annually for inflation with the Consumer Price Index (CPI-U). The official poverty definition counts money income before taxes and excludes capital gains and noncash benefits (such as public housing, medicaid and food stamps) (Source: Census Bureau). For a more in-depth discussion of poverty, see Appendix III.

Poverty Thresholds: Poverty thresholds are the dollar amounts used to determine poverty status. Each person or family is assigned one out of 48 possible poverty thresholds. Thresholds vary according to the size of the family and ages of the members. The same thresholds are used throughout the United States.

Thresholds are updated annually for inflation using the Consumer Price Index for All Urban Consumers (CPI-U) (Source: Census Bureau).

Part-Time Employment: A person employed less than 35 hours per week.

Post-Placement Follow Up: An effort to increase client job retention and productivity by means of regular contact by staff and the provision of supportive services such as transportation and child care.

Retention: In the context of employment, this means keeping clients involved in a program or employed with an agency over an appropriate period of time.

Salary: Fixed compensation paid in exchange for labor or services. Most salaries are paid for a fixed periods of working hours.

Seasonal Adjustment: A process whereby normal seasonal changes in employment are removed or discounted. In doing so, the underlying employment trends are easier to identify.

Sectoral Employment: Employment by major industry sector.

Shortage of Workers: A situation in which there are too few applicants with the required experience and abilities to fill openings within a reasonable amount of time.

Situational Barriers: Barriers to employment caused by "situations" in an individual's personal life. These include such things as an ill child, an alcoholic spouse, homelessness, substance abuse, or mental or emotional problems.

Size of Family: The term "size of family" includes the family householder and all other people in the living quarters who are related to the householder by birth, marriage or adoption (Source: Census Bureau).

Size of Household: The term "size of household" includes all the people occupying a housing unit.

Supplemental Security Income: The Supplemental Security Income (SSI) program pays benefits to disabled adults and children who have limited income and resources. SSI benefits also are payable to people aged 65 and older without disabilities who meet the financial limits.

<http://www.ssa.gov/pgm/ssi.htm>

Staffing Pattern: Each business employs workers with different types of skills in order to produce a good or provide a service. A staffing pattern summarizes the array of workers needed for a particular industry. The costs of labor and equipment in a local area will largely determine the mix of workers that a business will employ to remain competitive. Industry staffing patterns are often used to determine the ability of a local area to support economic development by being able to provide a skilled workforce.

Static Labor Market: Unchanging labor market conditions resulting from the development of few openings coupled with a correspondingly low number of applicants.

Structural Unemployment: This type of unemployment occurs when the basic nature of the economy changes over time – when employers no longer demand skills that unemployed workers possess. Structural unemployment is involuntary unemployment and typically requires retraining or education of displaced workers to bring their skills in line with demand.

Subsidized Employment: Subsidized jobs or subsidized employment includes paid work experience (including summer jobs for youth), internships, externships and community service employment. States may use federal TANF and state funds for community service employment (i.e., publicly funded, wage-paying jobs designed to provide employment for individuals and to address unmet community needs).

Supply/Demand: In labor market information this term usually refers to the supply of workers in relationship to the demand for workers.

Supportive Services: Assistance provided by an agency other than academic or occupational skills training to help clients overcome barriers of employment. Common examples include providing bus tokens to reduce transportation costs or vouchers to cover child care expenses.

Surplus of Workers: A situation in which the number of applicants ready and willing to work is larger than the number of job openings.

Trainee: An individual hired for a job, which may or may not require previous experience or education. A trainee could start in an entry-level, apprenticeship-level or internship-level position.

Transitional Employment: Job seekers with few skills or little workplace experience who have multiple barriers to employment are often placed in subsidized employment that allows them to gain life skills and confidence, combined with education and vocational skills training. This type of temporary employment environment can increase self-esteem and can often motivate individuals to achieve permanent employment and self-sufficiency.

Turnover: The rate of replacement of employees.

Under-Employment/Employed: A condition which exists when the full potential of labor is not being utilized.

Unemployed: Persons aged 16 years or older who are not working but are able to work, are available for work, and are seeking either full-time or part-time work.

Unemployment Insurance Program (UI): A national program administered by the U.S. Department of Labor under the Social Security Act. Provides temporary weekly payments to workers who lose their jobs through no fault of their own. The payments are financed by contributions from employers based on the wages of their covered workers. Eligibility for benefits requires that the claimant be able to work, be seeking work, and be willing to accept a suitable job.

Unemployment: Comprises all civilians 16 years and over who did not work during the survey week, who made specific efforts to find a job within the past four weeks, and who were available for work (except for temporary illness) during the survey week. Also included as unemployed are those who did not work at all but were available for work and (a) were waiting to be recalled to a job from which they had been laid off for a specific time; or (b) had a new job to go to within thirty days.

Unemployment Rate: The unemployment rate is derived by dividing the number of unemployed by the labor force. The result is expressed as a percentage.

U.S. Department of Labor, Employment and Training Administration (DOLETA): The mission of the Employment and Training Administration is to contribute to the more efficient functioning of the U.S. labor market by providing high quality job training, employment, labor market information and

income maintenance services primarily through state and local workforce development systems.
<http://www.doleta.gov/etainfo/mission.cfm>

Wages: A payment, usually of money, for labor or services performed. All remuneration paid for personal services from whatever source (salaries, commissions, bonuses, drawing accounts, fees, vacation pay and wages in lieu of notice) are considered "wages" for unemployment insurance purposes. Payments made to employees in a medium other than cash are also considered "wages," except for meals, lodging and clothing when furnished for the employer's convenience and on his/her premises.

Workforce Development: A general term to describe various efforts to improve the academic and occupational skills of all citizens. This term became popular in the mid-1990s, eclipsing "employment and training programs," which usually refers only to government programs benefiting laid-off workers and the poor. Workforce development efforts are still often referred to generically as "Job Training" or "Jobs" programs.

Workforce Development Areas: Geographic areas defined by the Workforce Development Council for implementation of the Workforce Investment Act.

Workforce Development Board: A Workforce Development Board is a group of community leaders appointed by local elected officials and charged with planning and oversight responsibilities for workforce programs and services in their area. In North Carolina there are 23 local Boards.
<http://www.nccommerce.com/wf/workforce-professionals/workforce-development-boards>

Work First: North Carolina's Temporary Assistance for Needy Families program. This term refers to the philosophy and operating concept of the new federal welfare reform initiative and also to the restrictions on the use of welfare-to-work funds. These funds can only be used for activities that directly promote, encourage and place welfare recipients into jobs (as opposed to classroom training). The concept is based on the idea that the best way for individuals to succeed in the labor market is to join it first and that new workers develop strong work habits, marketable skills and essential workplace experience on the job, not in the classroom.

Work-Readiness Training: Training provided to help clients get and keep jobs. "Job-getting" skills include such things as interviewing, grooming and resume-writing. "Job-keeping" skills include attendance, punctuality, getting along with others and resolving conflicts.

¹Pittsburgh Partnership Workforce Development Glossary. (2004)
<http://www.pittsburghpartnership.org/resource.html>

Appendix VII: Relevant Acronyms

Acronym	Full Name
ACS	American Community Survey
ASEC	Annual Social and Economic Supplement
BLS	Bureau of Labor Statistics
BOC	Bureau of the Census
CES	Current Employment Statistics
CESER	Center for Employment Security Education and Research
CPI-U	Consumer Price Index for All Urban Consumers
CPS	Current Population Survey
DOLETA	Department of Labor, Employment & Training Administration
DWP	Dislocated Worker Program
EITC	Earned Income Tax Credit
ES-202	Covered Employment and Wages Program
ETC	Employment Tax Credit
FIS	Family Impact Seminar
FLSA	Fair Labor Standards Act
FPG	Federal Poverty Guidelines
FPL	Federal Poverty Line
FTE	Full Time Equivalency
GED	General Equivalency Diploma
IES	Industrial Extension Service at NC State University
IRP	Institute for Research on Poverty at Wisconsin
JTPA	Job Training Partnership Act
LAUS	Local Area Unemployment Statistics
LMA	Labor Market Area
MEP	Manufacturing Extension Partnership
MLS	Mass Layoff Statistics Program
MWR	Multiple Worksite Reports
NAM	National Association of Manufacturers
NAPC	National Anti-Poverty Commission
NAPS	National Anti-Poverty Strategy
NASWA	National Association of State Workforce Agencies
NAWB	National Association of Workforce Boards
NCCCS	North Carolina Community College System
NCDHHS	North Carolina Department of Health & Human Services
NCDWS	North Carolina Division of Workforce Solutions
NCIC	North Carolina Industrial Commission

OMB	Office of Management and Budgets
OPM	Official Poverty Measure
QCR	Employer's Quarterly Contribution Reports
RIB	Retirement Insurance Benefits
SAIPE	Small Area Income and Poverty Estimates Program
SIC	Standard Industrial Classification Codes
SIPP	Survey of Income and Program Participation
SPM	Supplemental Poverty Measures
SSD or SSDI	Social Security Disability Insurance
SSI	Supplemental Security Income
TA	Technical Assistance
TANF	Temporary Assistance for Needy Families
UI	Unemployment Insurance Program
USDHHS	United States Department of Health and Human Services
USDOL	United States Department of Labor
WDA	Workforce Development Area
WDB	Workforce Development Board
WFFA	Work First Family Assistance
WFB	Work First Benefits
WIC	Special Supplemental Nutrition Program for Women, Infants and Children
WRLP	Welfare Reform Liaison Project
WRTP	Wisconsin Regional Training Partnership
WWC	What Works Clearinghouse

Appendix VIII: Bibliography

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The following is a list of publications relevant to the 2012 Family Impact Seminar, *Working Toward Greater Prosperity: Evidence-based Employment Strategies*, related to the topics of jobs, poverty and family. This list includes academic publications as well as government and foundation reports.

These publications are intended to provide objective facts and reference on the above subjects and are not an endorsement of any one policy. The list is not intended to be comprehensive. The order of the section reflects the order of material throughout this report.

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