

Proposal Summary
Meeting Date: 3/1/2017

Search, Inc.
Request # 115307

Project Title:	Phase II of Career Services at the Planet Access Company
Duration:	24 months
Request Date:	1/18/2017
Request Amount:	\$135,000
Recommended Amount:	\$135,000
Program Area:	Human Services\Jobs program (not E)
Population Served:	Developmentally Disabled
Type of Support:	Salary Support\Program Staff
Grantee Location:	Chicago, IL
Primary Contact:	Ms. Beth Valukas

Project Abstract

The proposal is to build on a pilot program to advance efforts to identify job roles for individuals with intellectual and developmental disabilities (I/DD) in the third-party logistics (3PL) field. Participation by an academic partner will help to document the business case for employing this population.

Organizational Background

Annual Revenue Sources

Grants	1%	Government	71%	Earned Income	17%
Fees	9%	Private Support	1%	Other	1%

Finances

	Budget	Actual	Actual
	06/30/2017	06/30/2016	06/30/2015
Revenues	\$18,745,559	\$18,993,969	\$19,191,594
Expenses	18,245,085	18,515,047	18,513,220
Surplus (Deficit)	500,474	478,922	678,374
Net Assets	NA	\$10,919,301	\$10,440,380

Search, Inc. (Search) was founded in 1968 in the Cabrini Green neighborhood of Chicago to provide services to children with disabilities who, at the time, were generally excluded from the public school system. Over time, Search expanded its services to adults. Today, the organization’s mission is to empower persons with I/DD to achieve their full potential, accept a valued role in their community, and lead rich, rewarding lives. For over 45 years, Search has provided high quality services and supports for adults with I/DD. It operates 31 CILAs, has found residences for 76 individuals who have transitioned

from state institutions since 2007, runs adult day training programs for over 400 individuals and last year employed 126 individuals in employment programs including street cleaning, janitorial, foodservice, clerical and warehousing. Program locations range from the southwest side of Chicago to the northern suburbs of Waukegan and Mount Prospect.

Program Description

Planet Access Company (PAC) is a 3PL provider and social enterprise of Search that offers warehousing, inventory management, special handling and packaging services. PAC generates revenue to invest back into Search's programs and provides significant paid work experience for the individuals served by the organization. In July of 2015, PAC moved from a 34,000 ft² warehouse in Waukegan, IL to a 63,000 ft² warehouse in Des Plaines. This move relocated the warehouse to Search's primary service area, providing greater access to training and work opportunities as well as to partner agencies. In the time since, Search has led the significant expansion of the PAC training program (from an average of 6-8 students per year to 20+ students annually), the growth of paid work hours (from 9,500 hours annually to 16,900) and the full integration of the PAC workforce, achieving the goals of the first grant.

The overall goal of Phase II of Career Services at PAC is to expand competitive employment opportunities for individuals with I/DD both within the walls of the warehouse and through partnership with local businesses. This goal will be achieved through the following objectives:

1) Support the full integration of the PAC Warehouse by moving additional individuals from subminimum wage work into competitive positions, by developing opportunities for advancement and by expanding the role of individuals within the warehouse to additional functions.

Under Phase I of Career Services at PAC, Search successfully integrated the PAC workforce so that four individuals currently work competitively for an average of 20 hours each week (comprising approximately 28% of the permanent workforce at PAC). Over the next two years, the Career Services Program Manager will work to create appropriate movement from these positions, retaining successful employees and utilizing PAC as a springboard to community-based employment. This work will also include assessing the skills of individuals who are currently participating in subminimum wage work at Search in order to identify candidates for competitive employment at PAC. New opportunities will be developed for warehouse employees who are ready for advancement, such as training. Finally, this work will include additional training for existing employees to expand roles beyond current functions. Individuals with a high degree of ability will be considered for returns processing, order picking, inventory transfer, label production, complex production and receiving.

2) Transition individuals from subminimum wage work to competitive, community-based employment through further cultivation of relationships already established, with businesses where individuals can utilize the skills they have gained through warehouse fulfillment work in new settings.

Under Phase I, Search initiated outreach activities with local businesses where individuals could leverage their experience with the warehouse (either through subminimum wage work, competitive employment or the PAC Warehouse training program) to other businesses. Much of this work focused on relationships developed through membership in a local Chamber of Commerce as well as multi-chamber events in the north suburban area. Through these cultivation activities, Search established relationships with a variety of 3PL and other businesses where the experience and skills developed

through PAC training and employment can be easily transferred. Under Phase II, this work will include the continued cultivation of these relationships to achieve placement of individuals into community employment.

3) Continue the PAC Warehouse Training Program with students in transition and collaborate with school districts to move students into adult services with the goal of competitive employment.

In Phase I, Search provided hands-on training and direct work experience for a semester at a time (typically 12-16 weeks) to students transitioning from high school to adult services. Beginning in September of 2015, shortly after the re-location of the warehouse from Waukegan to Des Plaines, enrollment in the training program spiked from an average of 2-4 students per semester to an average of 10-12 students.

In Phase II, Search would serve an average of 10-12 students each semester with heightened collaboration with school districts to identify those students who are both aging out of transition services but also displaying an aptitude for community based 3PL work. Search will conduct outreach to students and families and make its services available to those interested in job development and placement services.

4) Secure an academic partner to develop and implement an evaluation process that looks at such data as productivity, quality, endurance/stamina, attendance and longevity to help make the business case for employing individuals with intellectual and developmental disabilities.

As a social enterprise of Search, PAC is uniquely positioned to collaborate on a research and evaluation project to examine the business case for employing individuals with intellectual and developmental disabilities. In Phase II, Search would secure an academic partner to design and implement an evaluation process to help make the business case for employing individuals with intellectual and developmental disabilities. Search has two avenues to explore in order to secure an academic partner. Search's parent organization, the Keystone Alliance, has a relationship with the Social Enterprise Initiative at the University of Chicago Booth School of Business. In addition, Search would explore Northwestern's Kellogg School of Management which assisted with a similar research and evaluation project funded by the Coleman Foundation at Have Dreams. Search would work with the academic partner to identify appropriate metrics, which will likely include productivity (units produced versus productive norm), quality (error rate versus baseline) and endurance and stamina. Additional indicators including attendance, absenteeism and longevity will be considered, with the potential to extend this particular set of metrics to all individuals working in competitive positions (both at PAC and in the community) with support from Search. Once the data has been collected, Search will collaborate with the academic partner to analyze the data and draw conclusions for use in the business case presented to prospective employers.

Expected Outcome

By the end of the 24-month grant period, a minimum of 50 individuals will have participated in the Warehouse training program, 4 individuals will be newly competitively employed by the PAC Warehouse, 4 individuals will have advanced in some capacity at the PAC Warehouse and an additional 8 individuals will have obtained competitive placements at external businesses by leveraging their experience at PAC. In addition to monitoring the outcomes noted above, Search has a broader goal of developing, in partnership with an academic institution, the "business case" for employing individuals

with developmental disabilities based on the successful integration of the workforce at the Planet Access Company.

Program Budget

Grant funding would support:

- Salary and benefit costs for two years of the full-time Career Services Program Manager who will have primary responsibility for goals and objectives of the project (\$125,000 or 93% of request)
- Evaluation consulting from a university partner (\$10,000 or 7% of request)

Prior Grants

Last Grant Date:	1/19/2016	Number of Prior Grants:	3
Last Grant Amount:	\$14,000	Total Amount Granted:	\$149,000

Recommendation

This proposal is aligned with our Disabilities Impact Plan strategy to fund efforts to expand job opportunities and prepare individuals for workplace success. In CFI’s first grant for Phase I of the Career Services program, Search established that individuals with I/DD can be trained in skills and work tasks relevant to the 3PL sector and make meaningful contributions in such a setting. This request is to build on the results of the first phase, continue to document the business case in order to convince private 3PL firms to employ this labor resource.

The approach Search is taking in this proposal is informed by efforts which were undertaken by CFI grantee Have Dreams in its work with entrepreneur Jean Kroll at her commercial bakery in Evanston. CFI funded similar program development as well as an MBA summer intern from the Kellogg School of Management who helped document the economic case. Such a research project would help strengthen the business case for further integrating individuals with I/DD in the 3PL sector in a way, we hope, that is similar to how it converted Kroll into a strong advocate of employing individuals with autism in light manufacturing settings.

We recommend approval of this request.

Search, Inc.			
Phase II of Career Services at the Planet Access Company			
1.18.17			
Total 24-Month Project Budget			
Revenue	Funds Needed	Funds Requested	Funds Committed
Coleman Foundation	135,000	135,000	
Private donations/grants	85,000		
Organizational contribution (revenue from PAC)	60,000		
Program Revenue	90,000		
Revenue Total	\$370,000	\$135,000	
Expense	Project Budget	Coleman Funds	Other Sources
<i>Personnel</i>			
Executive Director (.10 FTE)	20,000		20,000
Division Manager for Adult Learning and Career Services (.20 FTE)	26,000		26,000
Career Services Program Manager (1 FTE)	110,000	110,000	
Production Coordinator (.5 FTE)	45,000		45,000
Community Employment Specialist (.5 FTE)	37,000		37,000
Benefits (calculated at 27%)	64,260	15,000	49,260
<i>Other Expenses</i>			
University Evaluation Consultant	10,000	10,000	-
Program Expenses/Consumable Supplies	5,000		5,000
Transportation	6,520		6,520
Occupancy	22,982		22,982
Other/Misc.	5,000		5,000
Administrative Services (Keystone Alliance @ 4.9%)	17,236		17,236
Total	\$368,998	\$135,000	\$233,998