



# CONNECT

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**NATURE OF THE INNOVATION:** A network of six institutions—Bunker Hill Community College, Career Source, Centro Latino, Metro Credit Union, Metropolitan Boston Housing Partnership, and The Neighborhood Developers—sharing space and data in Chelsea, MA to provide coordinated services across four buckets: employment, housing, education, and financial literacy.

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## Key Features

**Co-Location Driving Increased Service Utilization:** CONNECT's managing partners—representing each of the six institutions—meet monthly and core services staff weekly. Close quarters and communication has built social capital and increased collaboration between partners. A client visiting Career Source seeking employment but needing to improve their English first can be referred to an ESOL program at Centro Latino in the same building, resulting in the client receiving “bundled services” across multiple buckets. Because these providers deliver services at CONNECT, the jobseeker will not have to visit multiple locations or duplicate intake processes to follow-up on a referral. About 20 percent of CONNECT clients utilize bundled services.

Having all of the partners already at the table is a facilitator for collaborating with employers as well. Two local banks who need bilingual staff are working with CONNECT partners Metro Credit Union, Career Source, and Bunker Hill Community College to create a training pathway into financial services.

**Shared Case and Data Management:** The CONNECT partners share a Salesforce database that allows staff to refer clients across programs and partners. Services clients use, such as financial coaching, are captured in the database, allowing partners a holistic view of client engagement with CONNECT providers. Project leaders speak to a collective sense of efficacy. Staff are grounded in their knowledge of how clients are using services and confident about which combinations of services are offering the highest return. Staff can see, for example, that clients utilizing financial coaching and multiple services are making progress on raising their income, net worth, or credit score at higher rates than clients using fewer services.



### PROJECT FOCUS

Integrated Case and Data Management

### GRANTEE

MetroNorth REB

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“When staff saw the outcomes from bundling services, commitment to the CONNECT model soared; they said, “I want my clients to do that... I might not be getting paid for increasing credit scores, but I know that’s going to help someone get a job.” —Ann Houston, Executive Director, The Neighborhood Developers

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**One-on-One Coaching and Peer Support Groups:** Clients interested in having a coach support them as they work to, for example, repair their credit score or attain a better job, commit to an 18 to 24 month relationship. CONNECT's financial and life coaches work with clients to formulate action plans, which are intended to be long-term cycles of goal setting and attainment: once a client makes necessary revisions to their resume, coaches might direct them to ESOL training as the next step to a better job. The CONNECT coaching model is light touch, with clients typically dropping down to monthly check-ins after six weeks. Clients are wholly responsible for actions such as enrolling in and attending programs. Coaches also facilitate group "Success Teams," which provide a space for clients to share their stories and challenges, network, and alleviate isolation. Success teams have been paired with financial education and employment search assistance to more comprehensively help clients reach their goals.

### ADVICE TO PRACTITIONERS

**Find a Great Database Administrator:** Creating systems and processes for intake, referral, and data sharing were necessary for CONNECT to unify multiple service providers as one entity. Intake, in particular, provided a host of obstacles—such as assigning staff to register clients for CONNECT based on their entry point (e.g., CareerSource) and determining whether walk-ins were registered—that managing partners worked collaboratively to address. CONNECT utilized a Database Administrator to take the lead in working with each partner to translate their intake requirements to fields in Salesforce, automating referrals, and ensuring staff were able to view clients' use of services across providers.

### OBSTACLES OVERCOME

**Resistance to Change:** Staff at the various partners were initially resistant to the CONNECT model. One point of tension was the significant differences in organizational cultures and services. Another was that staff are asked to do work for CONNECT—in the form of data entry and regular meetings to coordinate services, review referrals, and troubleshoot emerging issues—in addition to the work they were hired to do. To create buy-in, project leaders held retreats and cross trainings where one agency trained others on the services they provide. Over time, many staff came to embrace the model organically, motivated by outcomes for clients receiving bundled services as demonstrated through shared data.

## Future Outlook

**Building Career Pathways:** Continuing the work partners initiated with two local banks, CONNECT plans to work with employers to build career pathways. Project leaders are currently working with area employers to create pathways in the hospitality industry.

## Interested in Learning More?

To learn more, visit [www.connectnow.org](http://www.connectnow.org).  
Grantee contact: Stefanie Shull, [sshull@tndinc.org](mailto:sshull@tndinc.org).

- Bundled services lead to stronger job placement outcomes: 14% of 1 bucket clients (464/3253) attained employment; 25% of 2 bucket clients (219/891) did.
- As of July 2015, 522 customers received 1:1 coaching, 166% of CONNECT's grant goal.

