

NEW YORK CITY'S WORKFORCE LANDSCAPE

A network of programs, providers, and
organizations foundational for catalyzing a
robust and equitable economic recovery

SEPTEMBER 2022



Center for
New York City
Affairs

ACKNOWLEDGEMENTS

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NYCETC supports the workforce & economic development community to ensure that every New Yorker has access to the skills, training & education needed to thrive in the local economy, and that every business is able to maintain a highly skilled workforce. Founded in 1997 as the membership organization for New York City workforce providers, NYCETC has played a vital role in the workforce community, focused on advancing policy priorities and convening the sector to build capacity by sharing information and best practices.

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The Center for New York City Affairs at The New School is an applied policy research institute that drives innovation in social policy. The Center provides analysis and solutions, focusing on how public policy impacts low-income communities, and striving for a more just and equitable city.

ACKNOWLEDGEMENTS

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EXECUTIVE SUMMARY

New York City relies heavily on nonprofit workforce development providers to connect New Yorkers, especially those who face barriers in the labor market – not only to jobs, but also to the services and training necessary for securing long-term, family-sustaining employment. The City of New York pays for approximately half of workforce development services offered within it.¹ What this means is that not only is the City a major funder of workforce activities, but also that the City relies on the workforce ecosystem to provide crucial services for its residents. The workforce ecosystem is, in effect, providing services to New Yorkers in need on behalf of the City government. The range of services that workforce development organizations provide – job training and placement, career exploration, internships and apprenticeships, adult education and literacy, college access and persistence programs, wage subsidies, employment retention and advancement services, and benefits access and tax preparation – has only increased since the onset of Covid-19.

As New York City copes with the social and economic tumult of the past two years, the role of workforce development providers is central to a full and equitable recovery. Tens of thousands of workers still suffer from pandemic-related employment dislocations. Populations usually facing barriers in the labor market due to age, education, criminal justice-involvement, or access to housing were among those hardest hit and are in the greatest need of being reconnected with opportunities for good jobs and career pathways. As the city emerges into a changed economic landscape, the mix of employer demand for workers has been altered, and many jobs that people had in February 2020 no longer exist.² But in addition to helping workers reconnect to work, today there is an opportunity to – as Mayor Eric Adams’ economic recovery blueprint underscores – “Rebuild, Renew, and Reinvent”³ to focus on helping job seekers acquire the skills needed to put them on a path toward a better-paying and more rewarding career, and to foster greater racial equity in the process.

Therefore, it is essential to understand the landscape of the City’s workforce development system now more than ever. A full picture of the rich New York City workforce development ecosystem is essential not only for City government, but also for workforce providers and philanthropic funders to understand the range of programs, services, and supports spread across the five boroughs and to begin making connections across organizations that will help this ecosystem function better given the critical and heightened need. Moreover, a clear review of the landscape of workforce programs and organizations is essential for the Mayor and City Council to integrate their thinking of workforce solutions into this already-existing workforce development ecosystem.

Mayor Adams⁴, the City Council⁵, past administrations⁶, workforce development providers⁷, advocates⁸, and philanthropic funders⁹ agree on the need for structural and organizational change that includes system alignment, coordination, innovation, and collaboration. In 2014, the Jobs for New Yorkers Task Force developed by the de Blasio administration concluded that “the system requires a profound change in both its basic orientation and how it functions...to

move away from a strategy of simple job placement to one that builds the skills that advance careers and increase earning potential for our city's working men and women."¹⁰ Similarly, in his March 2022 vision for the future of the city's economy, Mayor Eric Adams acknowledged that, "currently, New York City's talent development system is fractured – managed by more than two dozen City and State agencies and offices and executed by the City University of New York, the Department of Education, hundreds of nonprofit and for profit human service providers, intermediaries and associations, our three public library systems, and employers. The City will create a more effective talent development and delivery system to improve workers' access to services that qualify them for good jobs."¹¹

As the City has acknowledged the systemic barriers that the workforce development provider community faces in regards to government processes and structures and has committed to making sure our pandemic recovery is centered on equity and economic mobility, this report is structured as a resource and tool for stakeholders to be able to analyze and consolidate fractured systems toward our shared goal of ensuring that every New Yorker has access to the skills, training, and education needed to thrive in the local economy, and that every business is able to maintain a highly skilled workforce.

This report offers an extensive overview of the city's existing workforce development landscape using results from a survey developed by the New York City Employment and Training Coalition, Workforce Professionals Training Institute, and the Center for New York City Affairs at The New School. The data generated by the survey details the size, scope, and budget of the organizations that make up New York City's workforce ecosystem; outlines the areas of service, modes of program delivery, and range of certificates and trainings offered; and describes the current state of affairs for the sector in 2022, underscoring the top challenges, needs, and priorities of workforce providers.

The main goal of this report is to serve as a baseline overview and educational tool of the current state of the workforce development landscape in 2022 for elected officials, including the members of the Adams administration and the New York City Council, workforce development providers and philanthropic funders. At a rudimentary level, we are seeing distinct patterns emerge from the data including the profound impact of COVID on staff and job seekers, drastic budget cuts at the onset of the pandemic, and a pivot to digital service delivery due to pandemic-related health requirements, all while organizations were currently facing increased demand for services. This report explores the consequences due to those challenges with the intention that providers and elected officials can zero in to resolve these challenges and build a more robust, innovative and equity-centric system for New York's residents.

While this report does provide analysis on the survey results and data, it does not include recommendations for elected officials, or the field, on the workforce development sector. This report is setting a baseline for an in-depth analysis of the landscape in a secondary report to be published in Fall 2022.

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OVERVIEW

In his administration's plan for a citywide economic recovery from Covid-19, "Rebuild, Renew, Reinvent: A Blueprint for New York City's Economic Recovery," Mayor Adams highlighted the necessity of connecting New Yorkers to quality jobs and in-demand skills. The Mayor has pledged to "create a more resilient workforce, implement innovative talent development strategies that meet the needs of New Yorkers from all walks of life, and better prepare them for in-demand jobs in a post-pandemic economy. This includes improving the structure of the workforce system, addressing the impact that the future of work will have on training and education, and developing new tools to help workers find training and navigate the labor market."¹² Within its first few pages, the blueprint frames the administration's focus on "stronger gains and protections for workers in hardest hit and lowest wage industries."¹³ The Mayor's vision for an economic recovery includes:

- Removing barriers to economic opportunity where workers can participate in the labor force unconstrained by needs like childcare and broadband access;
- Ensuring young people graduating high school see career paths, and working adult New Yorkers are optimistic about their economic future; and
- Restoring New Yorkers' sense of opportunity, with new business starts, successful entrepreneurs, increased investment in local firms, and growth of the economy.

By making workforce development a core strategy of the City's pandemic recovery and a 21st century economy, the new administration has expressed a commitment and urgent necessity to invest in the workforce system and bolster the childcare system, to provide workers with the support and time to find high-quality jobs. But more is needed

– such as digital literacy, program stipends, wraparound supports, and labor-market informed training – to ensure that workers have the skills and financial security they need to access, launch, and grow into family-sustaining careers. Moreover, in promising to advocate for worker protections, wage support for low-paid workers, and long-term, holistic workforce strategies, the new administration's plans are ambitious and laudable, as they need to be to ensure that New York City's un- and underemployed workers are connected to fairly paid work and career opportunities in stable and growing sectors including tech, healthcare, and sustainability.

“

From crisis comes the opportunity to create a more resilient workforce, implement innovative talent development strategies that meet the needs of New Yorkers from all walks of life, and better prepare them for in-demand jobs in a post-pandemic economy.

– *Rebuild, Renew, Reinvest: A Blueprint for New York City's Economic Recovery (2022)*

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The current economic crisis in New York City underscores the urgency in the Mayor's message in the blueprint for elevating and buttressing the workforce development sector. In May 2022, New York City's seasonally adjusted unemployment rate was 6.2 percent, considerably higher than the 3.6 percent national rate. Moreover, unemployment is distributed unequally across the City's residents, with unemployed, discouraged,

and underemployed workers more likely to be workers of color. First quarter unemployment among White workers stood at 5.4 percent, compared to 11 percent for Black residents and 7.5 percent for Latinx residents. The rate of underemployment, including workers who were involuntarily employed part-time, was over 16 percent for Black workers and 15 percent for Latinx workers. Pandemic-era work disruption has also hit less-educated workers the hardest, with 11.5 percent of New York City residents with a high school education or less remaining unemployed and 18.6 percent underemployed.

As of May 2022, New York City has recovered only 77 percent of its pandemic job losses, with a residual jobs shortfall likely to persist for months to come. The City has consistently lagged behind other major cities and states in its recovery; the nation overall has recovered over 96 percent of its pandemic job loss. Meanwhile, the economic landscape has changed since the onset of Covid and will continue to change, with high-quality jobs increasingly requiring training in tech, health care, and non-sector skills such as effective communication, problem solving, listening, digital fluency, resilience and flexibility.¹⁴ Reconnecting workers to jobs and helping workers train for high-quality jobs is at the heart of an equitable recovery. This is the crucial role that the City relies on workforce organizations to fulfill.

The New York City Employment and Training Coalition (NYCETC), the Workforce Professionals Training Institute (WPTI) and the Center for New York City Affairs at The New School (CNYCA) sent a survey to approximately 170 providers in the workforce development community in Spring 2022, and 143 organizations responded. The intention of

the survey was to gather information about the sector across a variety of touchpoints: general and programmatic information and operational challenges to illustrate how individual providers and the ecosystem as a whole are faring two years into a global pandemic. These self-reported survey responses have been bolstered through a series of focus groups with executive leadership, program directors, and staff at workforce development and multi-service human service providers, with the goal of gaining a deeper understanding of the impact of the pandemic and the broader economic crisis on jobseekers, dislocated workers, and employer partners.



“As of May 2022, New York City has recovered only 77 percent of its pandemic job losses, with a residual jobs shortfall likely to persist for months to come.”

Workforce development providers are powerful actors, who provide vital services to a large swath of New Yorkers, which is particularly critical during the City's efforts to recover from the Covid-19 pandemic. The ecosystem that drives workforce development in New York City is very broad, encompassing City and State agencies, philanthropy, the City University of New York (CUNY) system, free-standing nonprofit and for profit service providers and intermediaries, labor/management training and education funds, portions of the K-12 system, the New York City library system, and employers. There are hundreds of programs across the five boroughs that are currently serving hundreds of thousands of New Yorkers, from college

graduates and current high school students, to incumbent workers looking to change careers, to justice-involved individuals, immigrants, and those who suffer housing instability.¹⁵ New York City's workforce ecosystem offers programs and services for every New Yorker, including public housing residents, parents, persons with disabilities, youth in foster care, veterans, retirees, and LGBTQIA+ youth and adults. It is populated by organizations and individuals with a breadth of program experience and years of involvement in their neighborhoods and communities.

THIS REPORT:

- Offers a map of the New York City workforce development provider landscape based on a recent survey of 143 workforce organizations¹⁶, detailing the size, scope, funding sources, and constituencies served by these organizations
- Serves as an educational tool about the sector for the Mayor, City Council, government agencies and leadership, workforce development providers, and philanthropic funders of the sector
- Outlines constituencies served, programs offered, and methods used for covering costs
- Analyzes current challenges, priorities, and needs, placing them into the context of the unique challenges of New York City's economy as it emerges from the pandemic
- Brings forth preliminary insight on patterns emerging from the survey data reported by providers, which include:
 - **Impact of Covid-19:** The pandemic emphasized and brought to the fore the structural access gaps to training programs and the sector as an entity.
 - **"Pressure Cooker" environment:** In tandem with the stress brought by the pandemic, providers' budgets have been drastically cut, leaving some (or many) struggling to survive.
 - **Under capacity in training programs:** In line with Covid-related budget cuts, individuals do not have enough wrap-around support to successfully participate in training.

Due to a tumultuous two years for workforce development providers exacerbated by a decrease in funding, but an increase in demand for services and adaptation of digital infrastructure, providers are reporting existing issues that have compounded over the years as well as unique challenges specific to the pandemic. The main goal of this report is to be a resource for elected officials and members of the workforce development sector - including providers and funders - to explore those challenges and fix them.

I. MAPPING NEW YORK CITY'S EXISTING WORKFORCE ECOSYSTEM

New York City is recommitting to supporting workforce development and Mayor Eric Adams has made workforce and economic development a pillar of his administration's economic recovery plan. Aligning policies, rightsizing investments, and increasing resources to support the already vibrant ecosystem of workforce development providers is essential. Moreover, as workforce development organizations seek to partner and cooperate with other providers, a detailed map of the New York City workforce landscape will enrich their program offerings and mechanics and their ability to serve their constituents.

A fundamental challenge of the City's workforce ecosystem is that there is no holistic census of the field as a whole that captures the totality of service providers, let alone individual programs and services. While there have been a number of efforts that have examined portions of the system through various lenses – such as City funded programs¹⁷ and technology skills trainings¹⁸ – a complete and in-depth mapping of the field has yet to be fully achieved. This survey and landscape report are a snapshot that captures a significant portion of the ecosystem but nowhere near the whole, and acts as a strong representation of the depth and breadth of the field.

SIZE, SCOPE, AND BUDGET

The 143 survey respondents ranged from small neighborhood-focused organizations to large multi-service organizations with national presences. Similarly, organizational budgets ranged from less than \$250,000 annually (12 respondents), to more than \$20 million annually (46 respondents), with just over a third of organizations falling into the budgetary range between \$1 and \$10 million annually (52 organizations). While a majority of the respondents were multi-

service organizations (61 percent), nearly a third focused exclusively on workforce development (32 percent), and an additional 9 respondents fit neither profile. Both multi-service and workforce-only organizations spanned a range of budgetary categories, with neither type of organization tending to be exclusively small or large. See *Figure 1*.

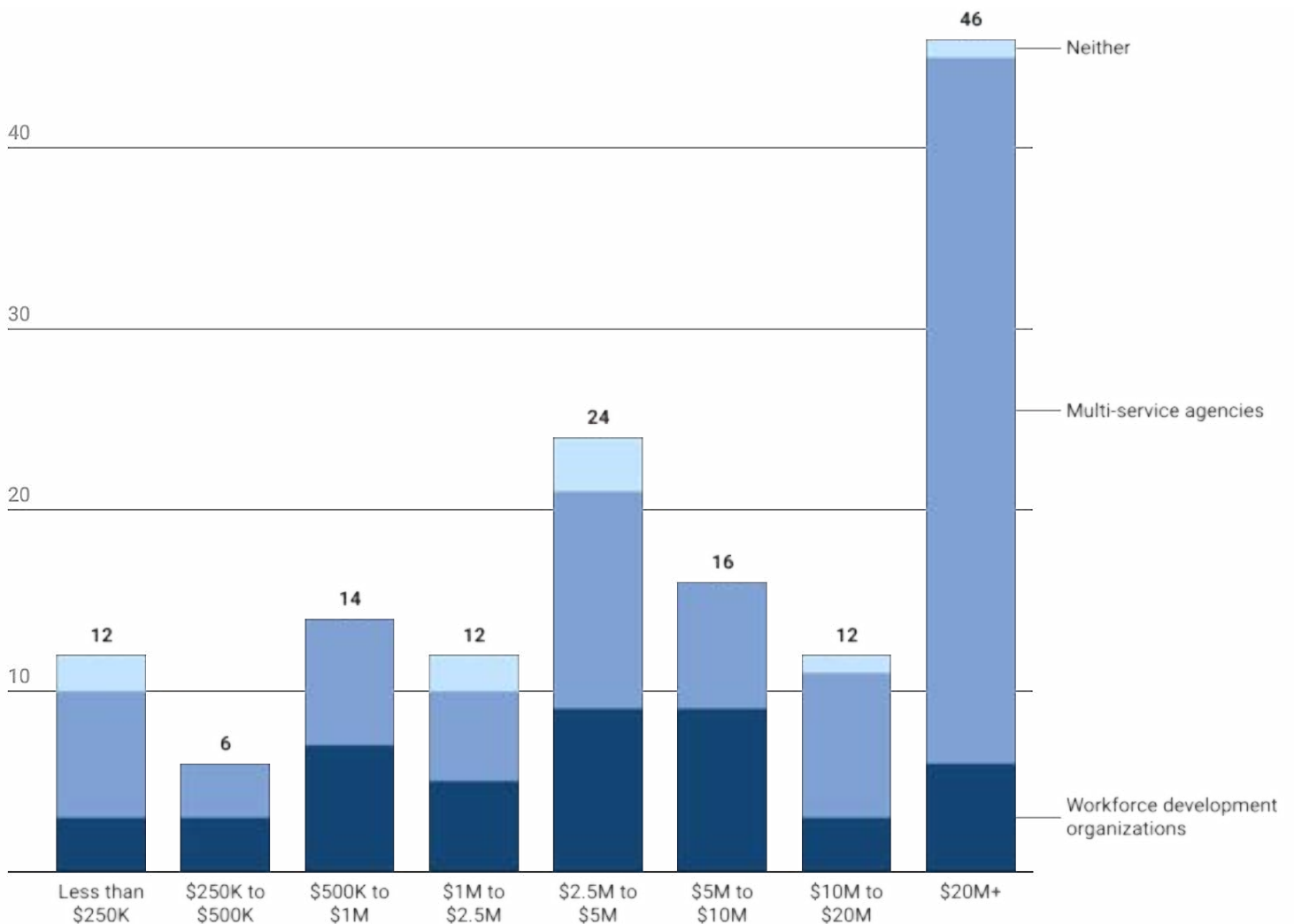
Historically, it has been difficult to provide specificity and hard data on the totality of the workforce system (including its providers, clients, programs, and outcomes) due to its sheer size, administrative diversity, and an overall lack of a shared information infrastructure. Currently, there are at least 75 funding streams administered by 21 City agencies that support workforce development programming with approximately \$678 million in annual funding.¹⁹ This system is supplemented by approximately \$75 million in private funding. As a whole, the system has no shared definition of success; no uniform data; very limited capacity to monitor and assess data; few incentives that reward effective long-term, holistic outcomes such as skills gains and career growth, and provides no one place that workforce providers and other stakeholders can approach with system-wide proposals.²⁰

Despite these systemic challenges, the variety in size, scope, and impact seen within the survey results demonstrates the overall strength and diversity of the workforce field, and underscores the need for consistent surveying and a shared data infrastructure. Because workforce organizations work at dramatically different organizational (from small, community-based organizations to borough-wide multi-service providers and community colleges) and programmatic scales (ranging from short-term programs like bootcamps and job placement services to long-term apprenticeships and career

advancement programs), organizations can serve anywhere from dozens to 50,000 workforce clients per year. The mean number of workforce clients served by the 123 organizations that responded to questions regarding the number of clients served was 2,200 clients annually, with an estimated total of 300,000 workforce clients served overall. As discussed above, the 123 organizations that provided data on their workforce clients

represent a significant portion of the field, but not the field in its entirety, making it difficult to extrapolate an estimate of how many clients are served per year by the full system. However, it is clear that the workforce field serves significantly more than the 300,000 New Yorkers represented by the survey respondents alone, and further study is needed to reach a full accounting.

FIGURE 1. ANNUAL ORGANIZATIONAL BUDGETS OF WORKFORCE AND MULTI-SERVICE ORGANIZATIONS IN NYC BY NUMBER



Organizations are located across the five boroughs. Though the past two years have created enormous disruption for offices, with many organizations shifting to remote or hybrid workplaces, most respondents reported retaining physical office locations. As of May 2022, half of organizations said they retained at least one physical office space, and their workers divided their time between on-site and remote work (53 percent). More than a third of organizations reported their employees were working entirely on site in an office (37 percent). Fewer than 1 in 10 of those organizations had no office space at all, with their employees working entirely remotely (nine percent). Of those organizations that had physical locations, nearly half maintained multiple sites (46 percent reported more than one location).

While some organizations provide workforce service only, others (such as settlement houses and libraries) provide a multitude of human services, of which workforce is only one component. This variability means that the total number served annually, including those seeking workforce services as well as constituents that receive other services is an estimated 2.3 million New York City residents served each year by the 126 organizations that answered this question. The number of clients placed in jobs each year by the 109 organizations that responded to a particular job-placement question ranged from a handful to 10,000 each year.

To investigate the primary sources of funding across the sector, we grouped the funding sources for respondents' workforce development budgets between "public" and "private" for multi-service agencies and workforce development organizations. Public funding sources indicated in the survey include: City agencies such as the Department of Youth and Community Development (DYCD), Human Resources Administration (HRA), and the Department of Education (DOE) and the City's lawmaking body, the City Council, State agencies, such

as the Department of Labor (DOL), and Federal agencies. Private funding sources include individual donations and corporate and foundation dollars. Overall, workforce development organizations (ie. organizations that solely provide workforce development services) receive a lower share of their funding for their workforce development budgets from public vs. private sources (42 percent vs. 58 percent) while multi-service agencies receive a higher share of their funding from public sources vs. private sources (65 percent vs. 35 percent).

See Figure 2.

A further breakdown of funding sources also revealed that City agencies represent the largest source of funding for both workforce development organizations and multi-service agencies (26 percent and 39 percent respectively). This points to City funding playing a large role across the sector regardless of organization type and annual budget. Also, when looking at public sources one-to-one, state and federal funding offer a relatively small percentage of funding in comparison to City agencies. Consequently, opportunities should be developed to enable New York City workforce providers to unlock those funding streams further.

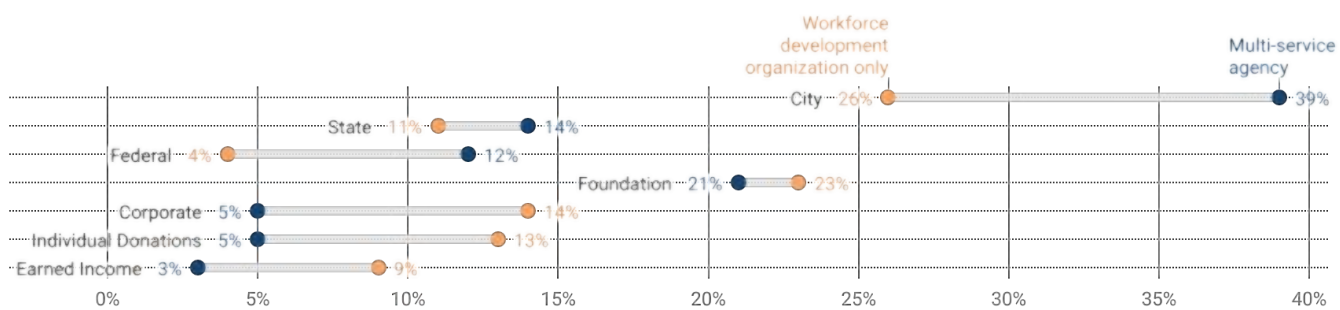
FIGURE 2. SHARE OF PUBLIC AND PRIVATE FUNDING FOR WORKFORCE PROGRAMMING FOR MULTI-SERVICE AND WORKFORCE ORGANIZATIONS IN NYC



Similarly, examining private funding on a granular level exposes another avenue for alternative funding sources. While private funding grouped together is sizable, it appears that on a case-by-case basis some of these funding sources are relatively small, particularly corporate dollars. Corporate funding sits at 5 and 14 percent for multi-service agencies and workforce development organizations respectively, which is a fraction compared to City funding. In addition, foundation dollars provide a nearly equivalent percentage of funding as the City. Combined, the City and foundations represent roughly 50 percent of funding for respondents – 49 percent for workforce development organizations vs. 60 percent for multi-service organizations.

Overall, funding for the sector is somewhat patchwork, with the majority of funding disbursed from public sources. However, a closer look reveals opportunities exist for private sources of funding, as well as one-time infusions of public funding (such as the federal American Rescue Plan which was created in response to the pandemic) to play larger roles across the workforce development landscape. In particular, private funding may have more flexibility for supporting innovation, partnerships, and client supports. See Figure 3.

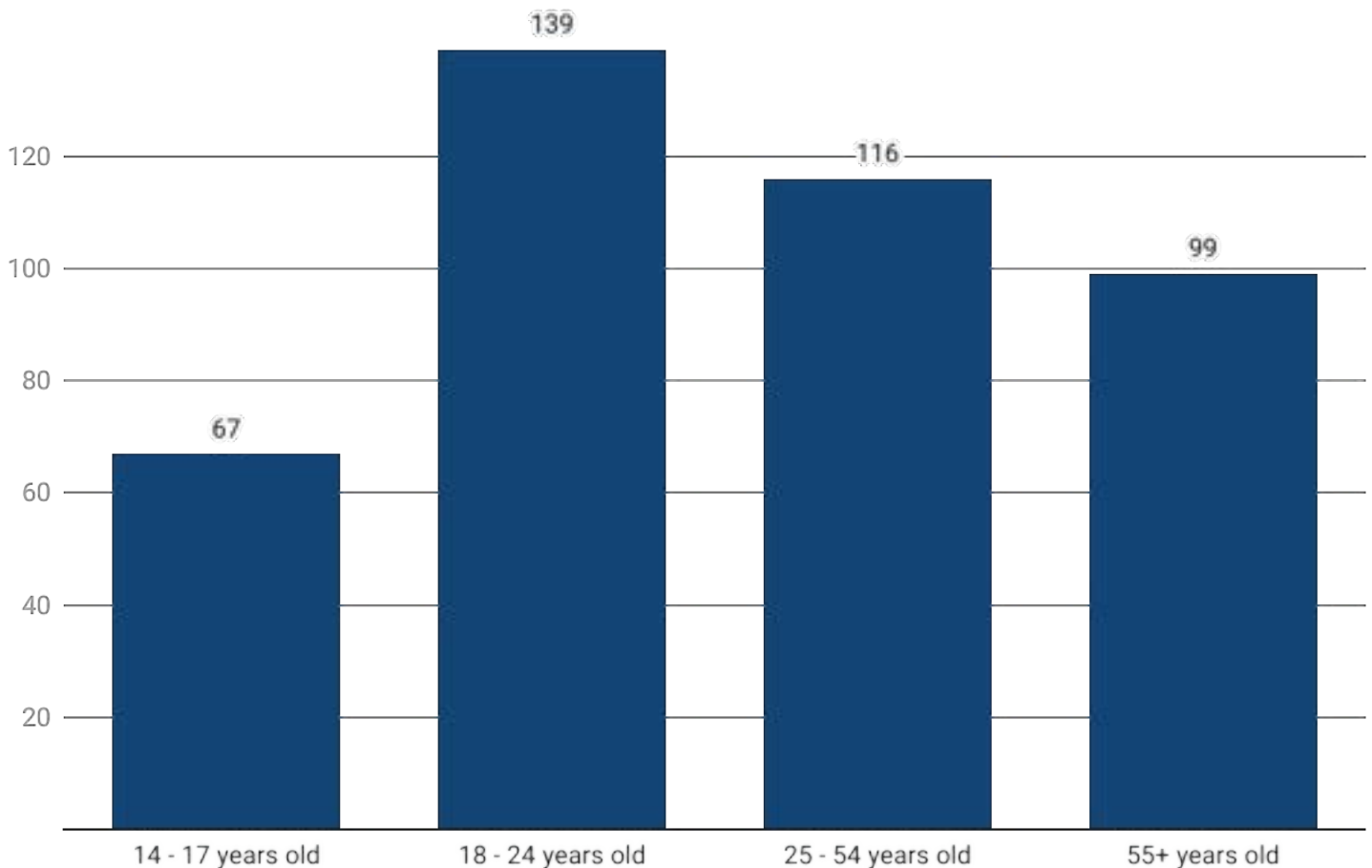
FIGURE 3. DETAILED FUNDING SOURCES FOR WORKFORCE PROGRAMMING OF MULTI-SERVICE AND WORKFORCE ORGANIZATIONS IN NYC



CONSTITUENCIES SERVED

The city's workforce organizations serve a range of New Yorkers, from teens to seniors, but many serve constituencies that are most in need of help surmounting significant labor market barriers, including criminal-legal-involved populations, those in foster care or without access to stable housing, as well as parents without access to childcare. Nearly all organizations work with younger adults, ages 18-24 (139 respondents), as well as prime-age workers (116 respondents). (Respondents were asked to select all age groups they served.) See Figure 4.

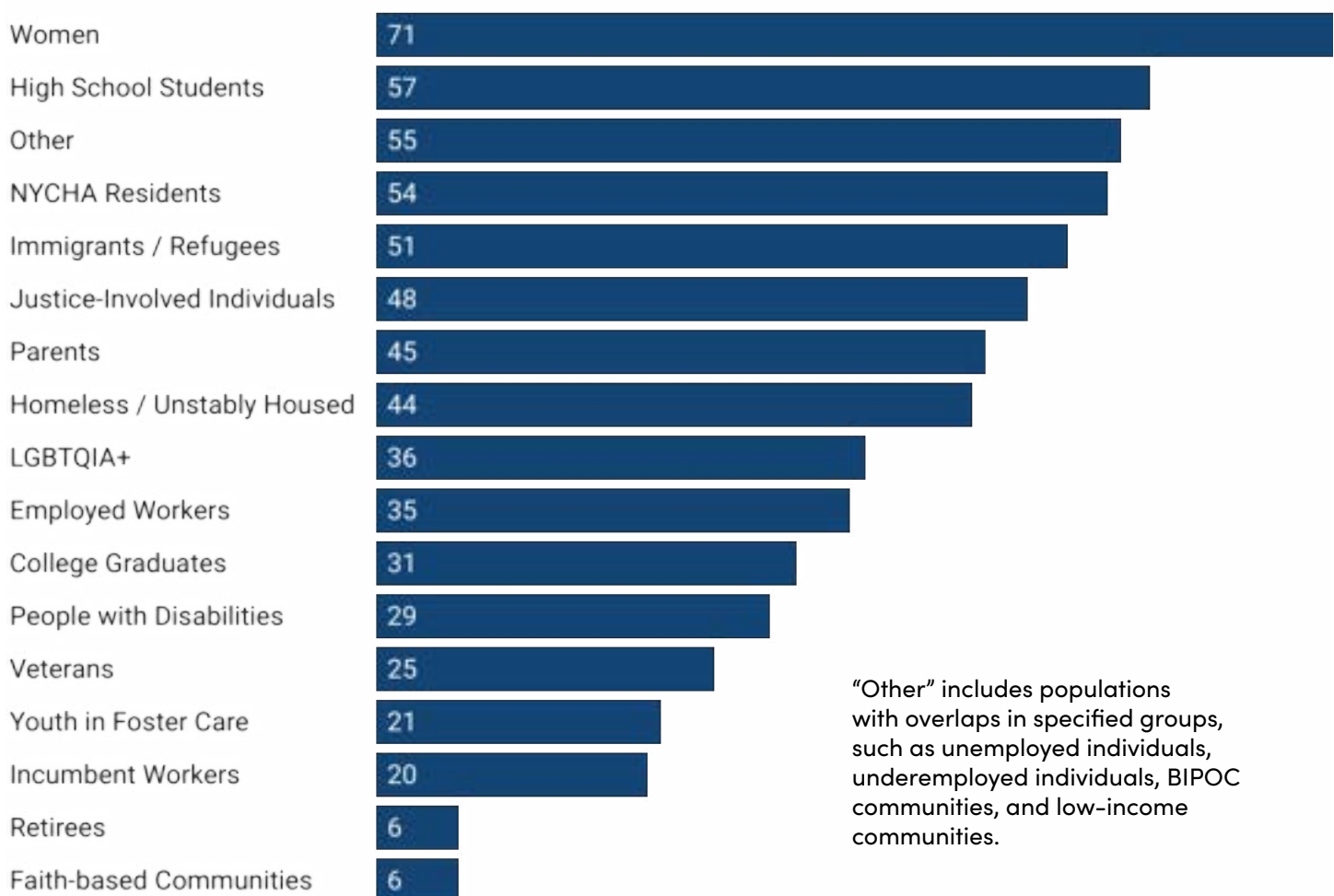
FIGURE 4. BREAKDOWN OF NYC'S WORKFORCE CLIENTS BY AGE (# OF ORGANIZATIONS)



While workforce organizations tend to serve a wide range of constituencies, we asked organizations to select up to five demographics that were the focus of their programming. Programs for women led the list (71 organizations), followed by high school students (57 organizations), NYCHA residents (54 organizations), immigrants, refugees, asylum seekers (51 organizations), parents (45 organizations), and justice-involved individuals (48 organizations). See Figure 5.

Some organizations serve more targeted populations — such as Temporary Aid for Needy Families (TANF) recipients or people with HIV and other chronic conditions — and other organizations offer wide ranges of services for specific populations, such as a range of services for the senior population, from home care and caregiver support to Social Adult Day programming.

FIGURE 5. POPULATIONS SERVED BY NYC’S WORKFORCE ECOSYSTEM (# OF ORGANIZATIONS)



II. PROGRAMS: AREAS OF SERVICE, MODES OF PROGRAM DELIVERY, CERTIFICATES AND TRAININGS OFFERED

Workforce development nonprofits have a multi-dimensional approach to assisting their constituents: connecting them to economic assistance where that is needed, identifying their skill and workforce needs, and providing essential support services to enable people to access and thrive while participating in training, education, or other workforce development programs. The City relies on these organizations for all of this – these organizations are the frontline service conduits between the city and its low-income residents.²¹

Workforce organizations provide a wide range of services to New York City residents and job seekers. Career Readiness Training, Job Placement Assistance, and Career Advancement Services led the list of services that respondents provided. Programs often offered a range of practical help to make it possible for job seekers to attend and complete training programs, as well as meet basic needs, from transportation, food and meals to stipends and direct cash assistance. See *Figure 6*.

While workforce and multi-service organizations provide a range of services themselves in-house, they also magnify their offerings by leveraging the diversity of the workforce ecosystem by partnering with other organizations to fill wrap-around gaps for clients whose specific needs they cannot support. As New York City looks to reinvest and support the work of these organizations and their staff, identifying and facilitating partnerships can magnify the impact of any single group. See *Figure 6*.

Organizations also offer a range of programs and services, such as financial and digital literacy training, that teach skills that are transferable from work to home and social situations. Many organizations seek to support the ‘whole worker,’ offering broad wraparound services such as counseling and mental health support, which are associated with positive outcomes in job training success.²² Few organizations were able to offer broader wrap-around services, like housing services, legal assistance, wage subsidies, and childcare. However, with soaring housing costs and severe shortages in childcare slots, such broad wrap-around services are likely to see only increased demand.

FIGURE 6. SERVICES PROVIDED DIRECTLY BY ORGANIZATIONS AND THROUGH PARTNERSHIPS

Services	Provided Directly	Provided by Partner
Career Readiness Training	118	26
Job Placement Assistance	112	21
Career Advancement Services	94	20
Sector-based Training	90	31
Retention Services	90	13
Financial Literacy	67	41
Digital literacy	66	26
Stipend	63	14
Project Based Learning	58	18
College Access Assistance	57	30
Transportation	57	21
Counseling	56	32
Loaner technology	49	9
Mental Health Support	48	50
Food / Meals	41	30
Adult basic literacy	37	24
Bridge Programming	35	27
Pre-HSE	32	16
HSE	32	27
ESOL	31	22
Entrepreneurship	29	11
Direct Cash Assistance	29	20
Housing Services	23	39
Legal Assistance	17	53
Wage Subsidy	15	13
Childcare	12	24

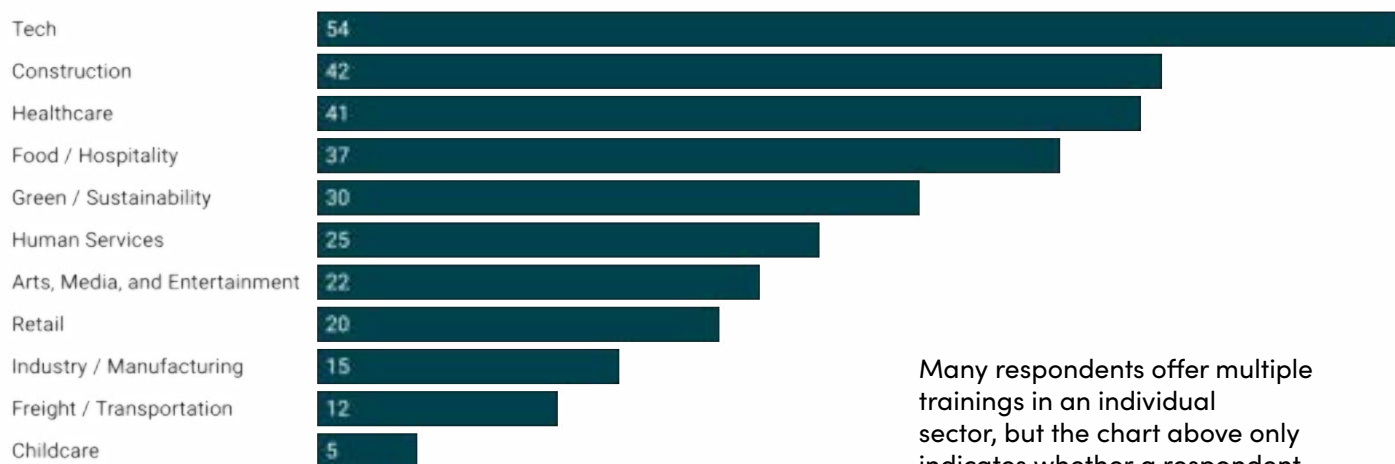
READYING WORKERS FOR IN-DEMAND JOBS: SECTORAL TRAINING

The 143 organizations represented in this survey provide services at nearly 250 locations across New York City and offer hundreds of sector-specific trainings. This illustrates the wide variety and specificity of program offerings and potentially points to providers' response to client and employer needs.

The sectors with the highest number of trainings and programs citywide were technology (18 percent of all programs), construction (14 percent), and healthcare (14 percent). By contrast, only 5 organizations offer services or training in the childcare sector (two percent of all programs) and 12 in transportation (four percent of all programs). See Figures 7 and 8.

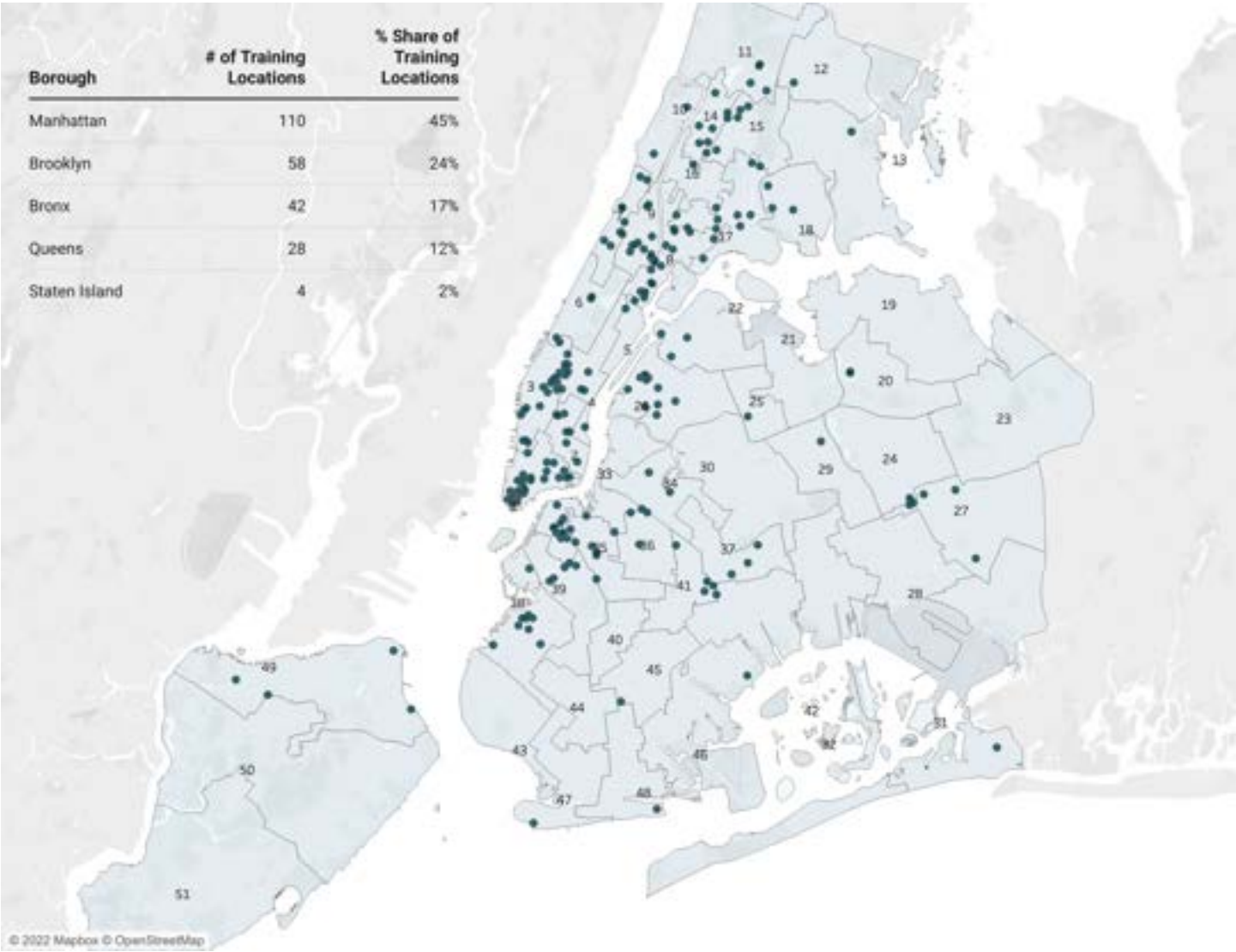
While not every training leads to a credential or certification, there are a wide variety of credentials that New Yorkers can receive through training. Below, we detail some of the associated credentials and certificates that organizations offer for the tech, construction, healthcare, food and hospitality, and retail sectors, as well as common cross-sectoral trainings like administrative, facilities, security, and janitorial. Many of these feature an "Other" category that include a number of programs in development, and customized training and certifications with employer and community partners. The large number of "other" reflects the continual innovation and employer engagement taking place across the ecosystem, particularly in fields that are emergent and rapidly changing.

FIGURE 7. SECTOR-SPECIFIC TRAININGS OFFERED IN NYC



Many respondents offer multiple trainings in an individual sector, but the chart above only indicates whether a respondent offers at least one training in that sector.

FIGURE 8. LOCATION OF ALL TRAININGS BY NYC COUNCIL DISTRICT



TECH TRAININGS AND CERTIFICATES

There are 114 tech-related certificate programs offered across the workforce landscape, with certificates in CompTIA A+ (15 organizations), Network+ (13 organizations), Certified Microsoft Office (13 organizations), and Amazon Web Services (12 organizations) among the most common. Additional certificates under the category of “Other,” include Broadband Installer, Facebook Certified Digital Marketing Associate, Splunk Core Certified User, Google Analytics Individual Qualification, W3 Schools JavaScript Certificate, Salesforce Administrator, Data Analytics, Oracle SQL. See Figures 9 and 10.

FIGURE 9. NUMBER OF TECH TRAINING PROGRAMS RESULTING IN CERTIFICATES

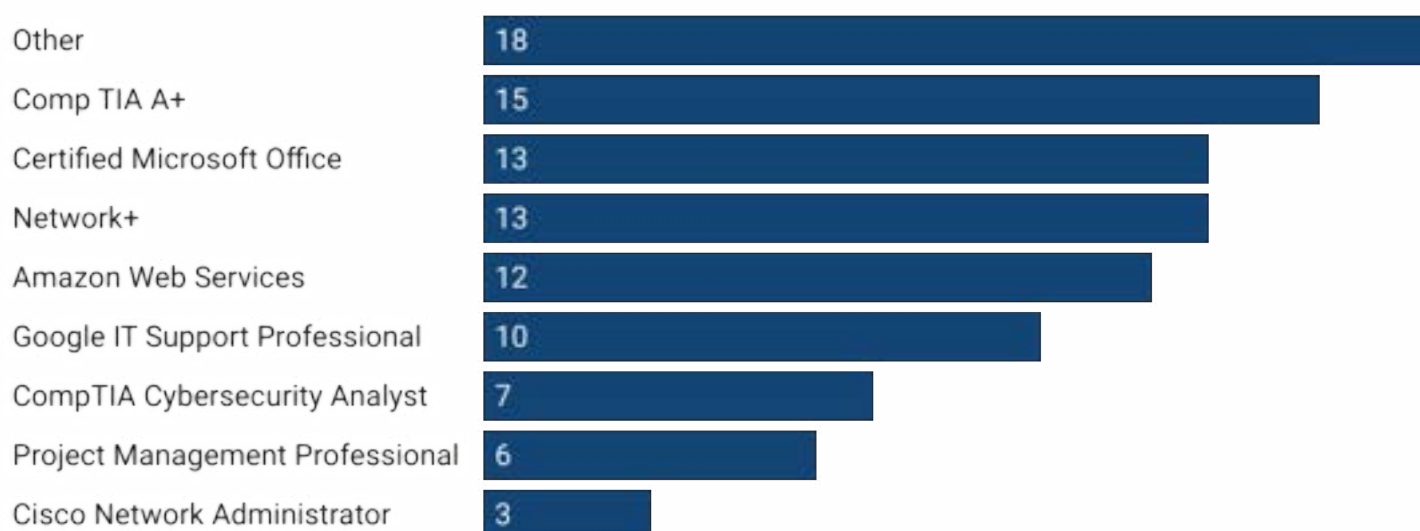
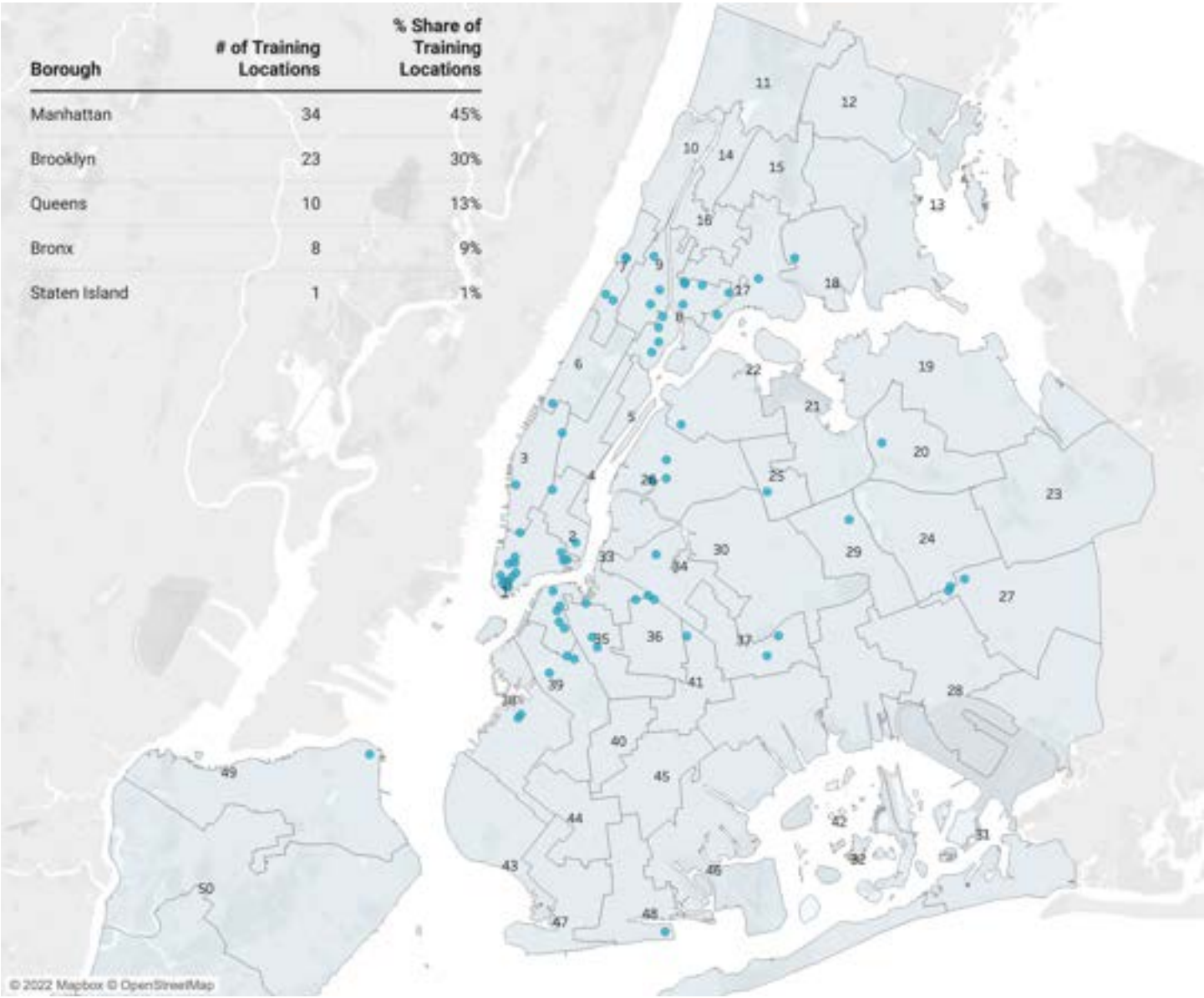


FIGURE 10. LOCATION OF TECH TRAININGS BY NEW YORK CITY COUNCIL DISTRICT



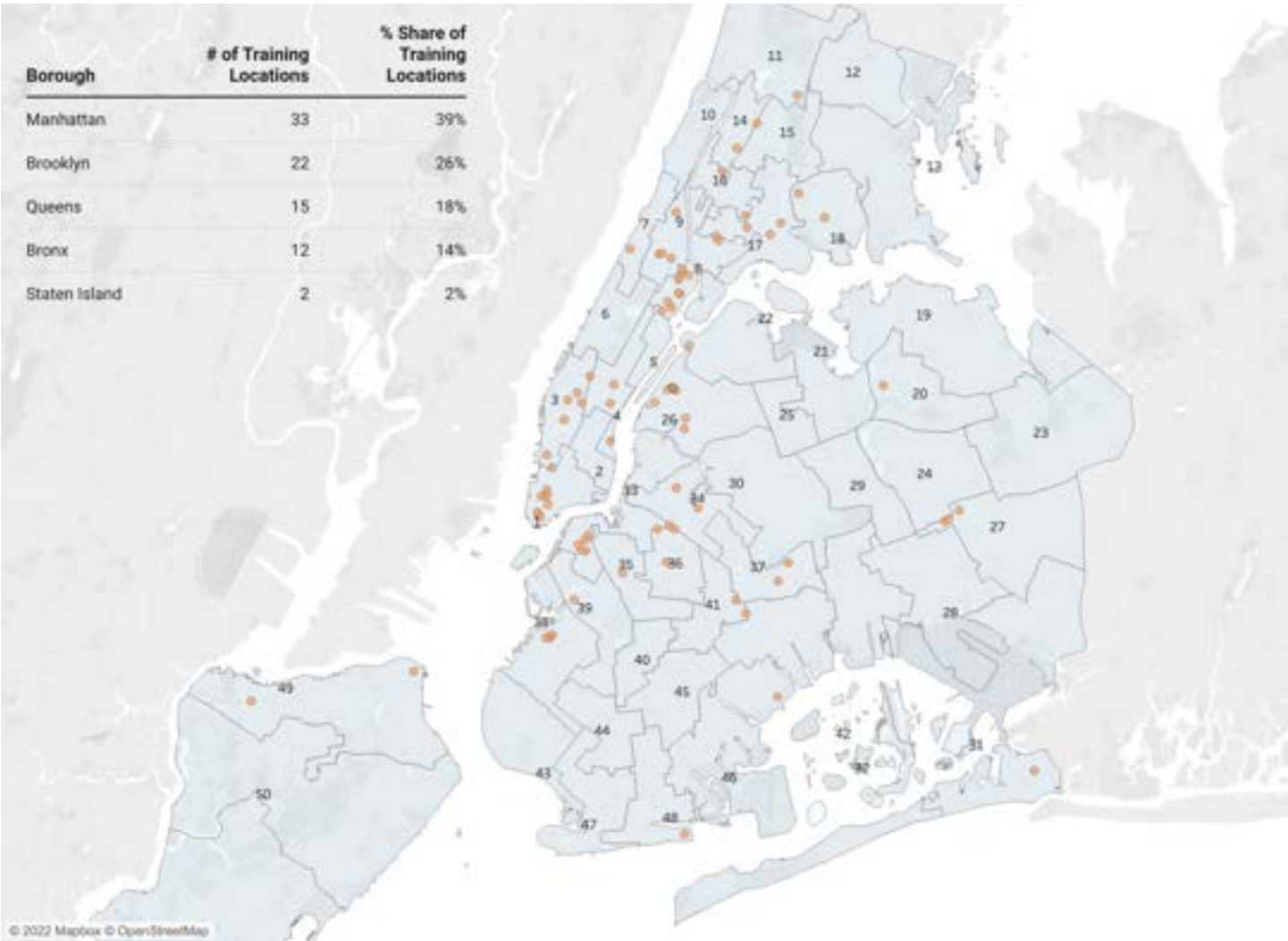
CONSTRUCTION TRAININGS AND CERTIFICATES

A total of 111 construction certificate trainings are offered across New York City, with OSHA 30 and OSHA 10 certifications among the most common, followed by 4-hour and 16-hour scaffolding certificates. The “Other” category includes certificates in Site Safety Training, NCCER Core, NCCER Electrical, NCCER Plumbing, NCCER HVAC, SST, 4-hour Flagger, and Site Safety Supervisor. See Figures 11 and 12.

FIGURE 11. NUMBER OF CONSTRUCTION TRAINING PROGRAMS RESULTING IN CERTIFICATES



FIGURE 12. LOCATION OF CONSTRUCTION TRAININGS BY NYC COUNCIL DISTRICT



HEALTHCARE TRAININGS AND CERTIFICATES

The most common healthcare industry credentials offered are: Home Health Aid (16 organizations), EKG Technician (13 organization), Certified Nurse Aide (13 organizations), and CPR Certification (13 organizations). The category of “Other” trainings includes: NYS DOH Paramedic, NHA CCMA, OMH Peer Specialist, Certified Medical Assistant, Certified Biller, Certified Coder, Direct Support Professional, Pharmacy Technician, and other healthcare-related certifications and credentials. See Figures 13 and 14.

FIGURE 13. NUMBER OF HEALTHCARE TRAINING PROGRAMS RESULTING IN CERTIFICATES

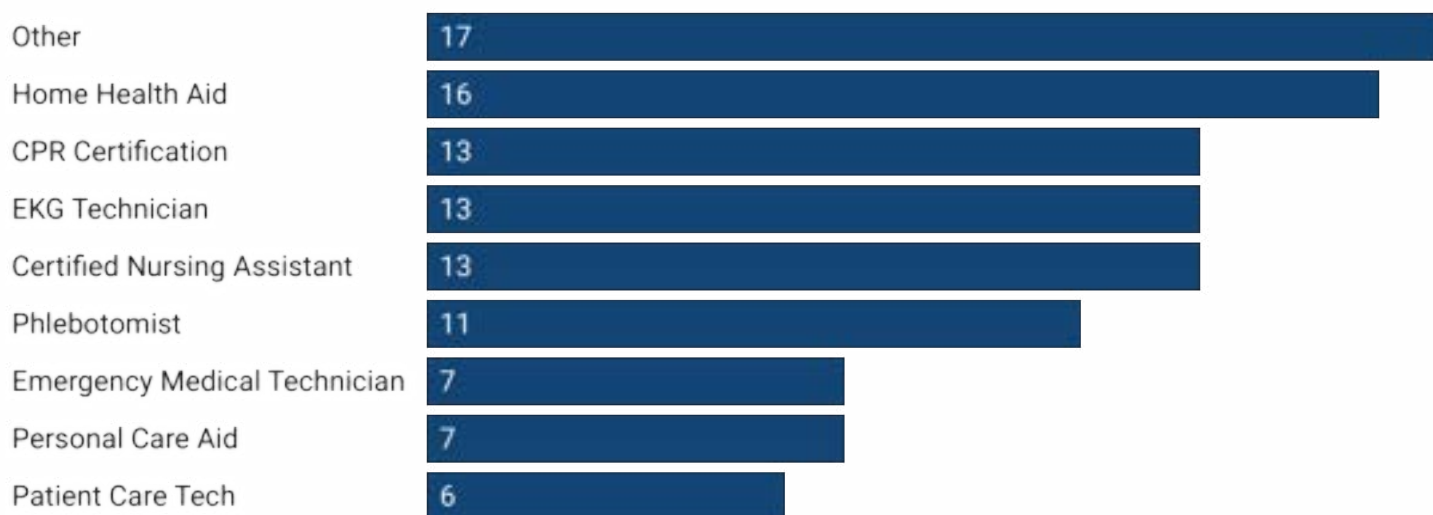
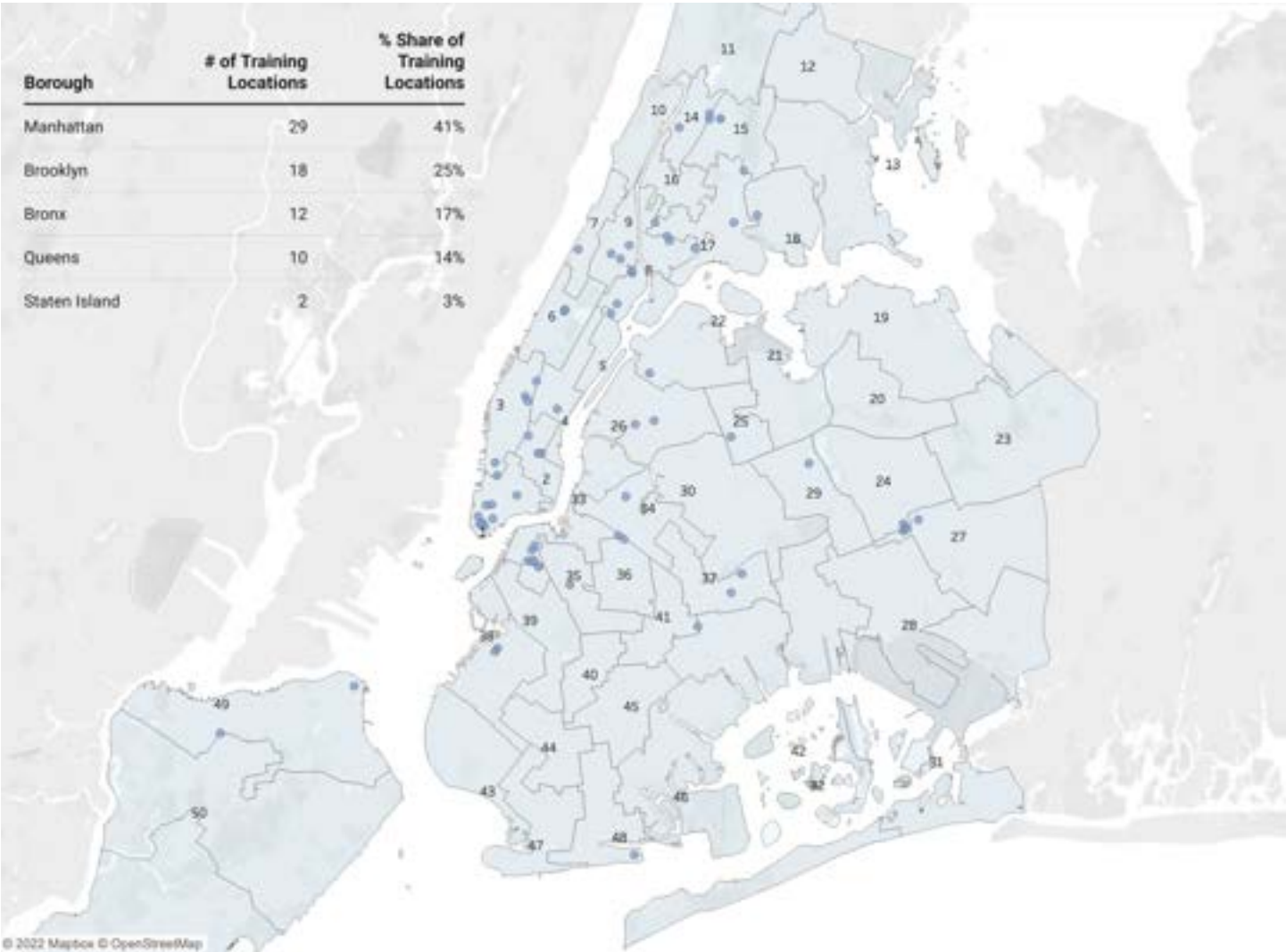


FIGURE 14. LOCATION OF HEALTHCARE TRAININGS BY NYC COUNCIL DISTRICT



FOOD AND HOSPITALITY TRAININGS AND CERTIFICATES

Organizations offer 46 certificate programs in the food and hospitality sector, led by Food Handler’s Certificate (20 organizations), ServSafe (13 organizations), and Customer Service Certificate (9 organizations). “Other” certifications include FirstCourse NYC for line cooks, CPR, and Food Protection Certification. *See Figure 15.*

FIGURE 15. NUMBER OF FOOD AND HOSPITALITY TRAINING PROGRAMS RESULTING IN CERTIFICATES



RETAIL TRAININGS AND CERTIFICATES

There are 10 Retail certificate programs offered, almost entirely focused on the National Retail Federation Certificate (19 programs), with one organization offering its own customized service training course. Typically, retail skills programs cover basic customer service, sales skills and techniques, math needed for sales, operational and workplace safety procedures in a retail environment, and an understanding of the retail industry. *See Figure 16.*

FIGURE 16. NUMBER OF RETAIL TRAINING PROGRAMS RESULTING IN CERTIFICATES



ADDITIONAL SECTORAL TRAININGS AND CERTIFICATES: SECURITY, TRANSPORTATION, CHILDCARE

Additional certificates are offered in the security sector (8/16 Hour Security, 20 programs), transportation (commercial driver's licenses, 10 programs), and childcare (childhood development associates, 2 programs). See *Figure 17*.

FIGURE 17. NUMBER OF ADDITIONAL TRAINING PROGRAMS RESULTING IN CERTIFICATES



NON- OR CROSS-SECTORAL TRAININGS: ADMINISTRATIVE, FACILITIES, SECURITY, JANITORIAL

In addition to sector-based training, the City's workforce development network offers nearly 100 cross-sectoral and non-sectoral trainings in administrative and office skills (25 programs), facilities and building maintenance (22 programs), security (21 programs), and janitorial (15 programs). Other non-sectoral programs include soft skills, general job readiness through corporate placements, as well as arts programs. See *Figure 18*.

FIGURE 18. NON-OR-CROSS-SECTORAL TRAININGS OFFERED IN NEW YORK CITY



III. CURRENT STATE OF AFFAIRS: CHALLENGES, PRIORITIES AND NEEDS

In the initial months of the pandemic, business closures, public health mandates to stay home, and concerns over health and safety fueled a spike in unemployment that was unprecedented in the modern era. Moreover, during the past two years, significant cash assistance and unemployment insurance, available to temporary and gig workers typically left out of unemployment benefits, allowed workers time to reassess their priorities, often renewing a commitment to finding quality and stable work that provides a living wage, allows flexibility to spend time with family, provides a healthy and supportive environment, and has prospects for career advancement.

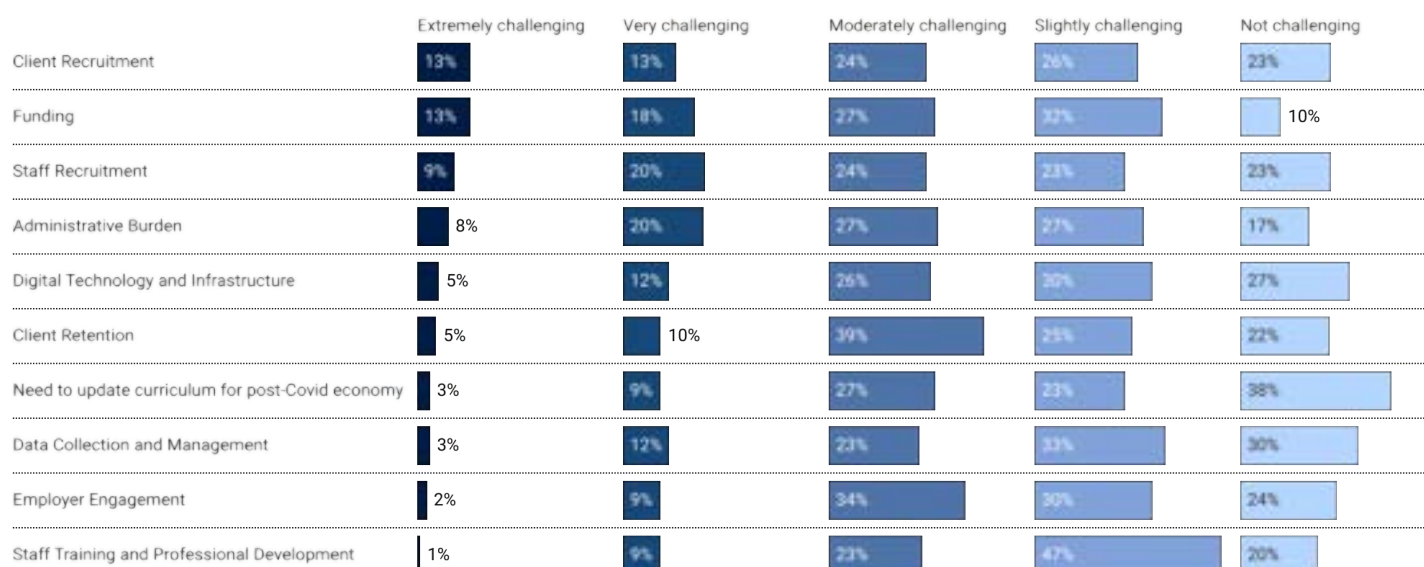
Since the start of the pandemic, many organizations have changed their employment placement program offerings, as well as their services in education and training. These changes reflect the serious and ongoing challenges posed by the pandemic and the pandemic economy, with public health concerns as well as budget reductions requiring organizations to adapt and pause some of their program offerings. Some organizations express a strong challenge with recruiting and retaining participants in their programming, while others have been overwhelmed with increased demand.

CHALLENGES

The Covid era has presented an onslaught of challenges for both workers and businesses, and the organizations that support them. While workers experienced a wide variety of difficulties from the environment that sprung from the pandemic, workforce development organizations continue to try to reconcile the nuances between the increase in demand for services and workers exiting the labor system due to societal, structural and personal reasons.

More than half of respondents indicated moderate to extreme challenges around funding, administrative burden, staff recruitment, and client recruitment. Over a quarter of organizations said recruiting clients was very or extremely challenging (26 percent). An even higher percentage of organizations reported funding to be very or extremely challenging (31 percent) as well as staff recruitment (29 percent). Likely reflecting the stresses of the past two years during which organizations had to adapt to remote and hybrid work schedules as well as develop new programming, more than a quarter of organizations said that their administrative burden was very or extremely challenging (28 percent). *See Figure 19.*

FIGURE 19. TOP CHALLENGES REPORTED BY PROVIDERS



CLIENT RECRUITMENT AND RETENTION

The survey revealed what may seem to be a tension between difficulties with client recruitment and pressure to expand services. This moment of uneven economic recovery and continuing uncertainty about public health has created a landscape in which it is challenging to recruit and retain participants in some workforce programs, while other services that organizations provide have been overwhelmed by demand. However, while many organizations are in fact seeing a shift in the needs and ambitions of job-seekers that impact their client numbers, there are also several Covid-related factors that make aligning funding, recruitment, and meeting demand more complicated. For example, some workers have left the workforce entirely, while others are hesitant to return to jobs in sectors that face disproportionate exposure to Covid-19 or are otherwise considered less safe.

Further, many New Yorkers, particularly the

working poor, are finding it more and more difficult to participate in any workforce programs, and especially those focused on training and upskilling that are often longer and have more time commitments than direct job placement services. Due to compounding financial and health hardships, it is becoming increasingly difficult for New Yorkers who need workforce programs in order to grow in their careers or access in-demand sectors to participate in them because they must instead take survival jobs to pay for basic necessities like food and rent. These difficult choices have simultaneously made client recruitment and retention more difficult for workforce providers, and increased demand for services that include wraparound supports (see “Capacity and Demand Challenges” below for details).

FUNDING

Organizations that are facing recruitment challenges and express need for more funding may be relying on grants with tightly-circumscribed programming and

outcomes requirements, which do not provide the flexible funds needed for longer trainings, meeting the needs of clients who require stipends or childcare in order to attend trainings, or paying frontline staff sufficiently. Overall, organizations expressed that they need more funding to creatively meet the diverse and critical needs of their clients and respond to the rapidly-shifting terrain of employer demand.

These responses echo longstanding feedback from leaders across the New York City workforce ecosystem. In 2018's *The Workforce Agenda for New York City*, published by Workforce Professionals Training Institute, it was noted that more funding is critical to maximizing the impact of workforce programming across the city, but that increased funding alone is insufficient. In order to truly meet the needs of workers and the organizations that support them in a changing economy, requests for proposals (RFPs), contracts, and grants must be designed with input from the field, and workforce services can no longer be structurally undervalued.²³

The extremity of funding challenges expressed by providers comes on the heels of two years of funding cuts and budget constraints due to the pandemic. In a similar 2021 survey by NYCETC, 96 percent of organizations stated that they saw a decrease in revenue due to reduced City contract funding, State contract funding, private philanthropy or fundraising in comparison to the previous City fiscal year. Of those who receive City funding, 64 percent reported a decrease in funding through contracts and 72 percent saw a decrease in discretionary funding. Additionally, many reported payment delays of City contracts (33 percent), State contracts (34 percent), and private philanthropy (nine percent). Budget cuts and financial uncertainty have led to staff cuts, with more than a third of 2021 survey respondents who receive City funding reporting having to decrease their staff size

in response to the fall in City funding.²⁴ While FY23's City budget brought funding levels back to FY20 levels, the financial hardships and their consequences are compounded and continue to be felt, as expressed in the results reported by this survey's respondents.

CAPACITY AND DEMAND CHALLENGES

The large variance seen between programs that are above and below capacity reflects larger economic challenges that New Yorkers and service providers are now facing in a permanently changed economy. This moment of uneven economic recovery and continuing uncertainty about public health outlooks has created a landscape in which it is challenging to recruit and retain participants in some workforce programs, while other services that organizations provide have been overwhelmed by demand. Many multi-service providers offer services such as assistance signing up for benefits (Medicaid, food stamps, public assistance, etc.) or accessing housing/shelter (either a spot in a shelter or more permanent affordable housing) – these types of services have been particularly urgent in the wake of Covid-19, and providers have mentioned anecdotally helping clients with these needs (even staff who do not typically perform these services) due to the extreme demand and urgent need.

In a series of focus group conversations following the survey, we spoke with direct service providers from over a dozen organizations. Frontline workers reported that many New Yorkers are reluctant to jump back into the same jobs that they held before Covid, looking for opportunities that offer remote options, more flexibility and health protections, higher wages, or room for growth. In short, they are looking for better jobs. At the same time, many prized the amount of time they had been able to spend away from work and were looking for opportunities that could support more holistic goals of contributing to their neighborhood, community, and city through jobs that were

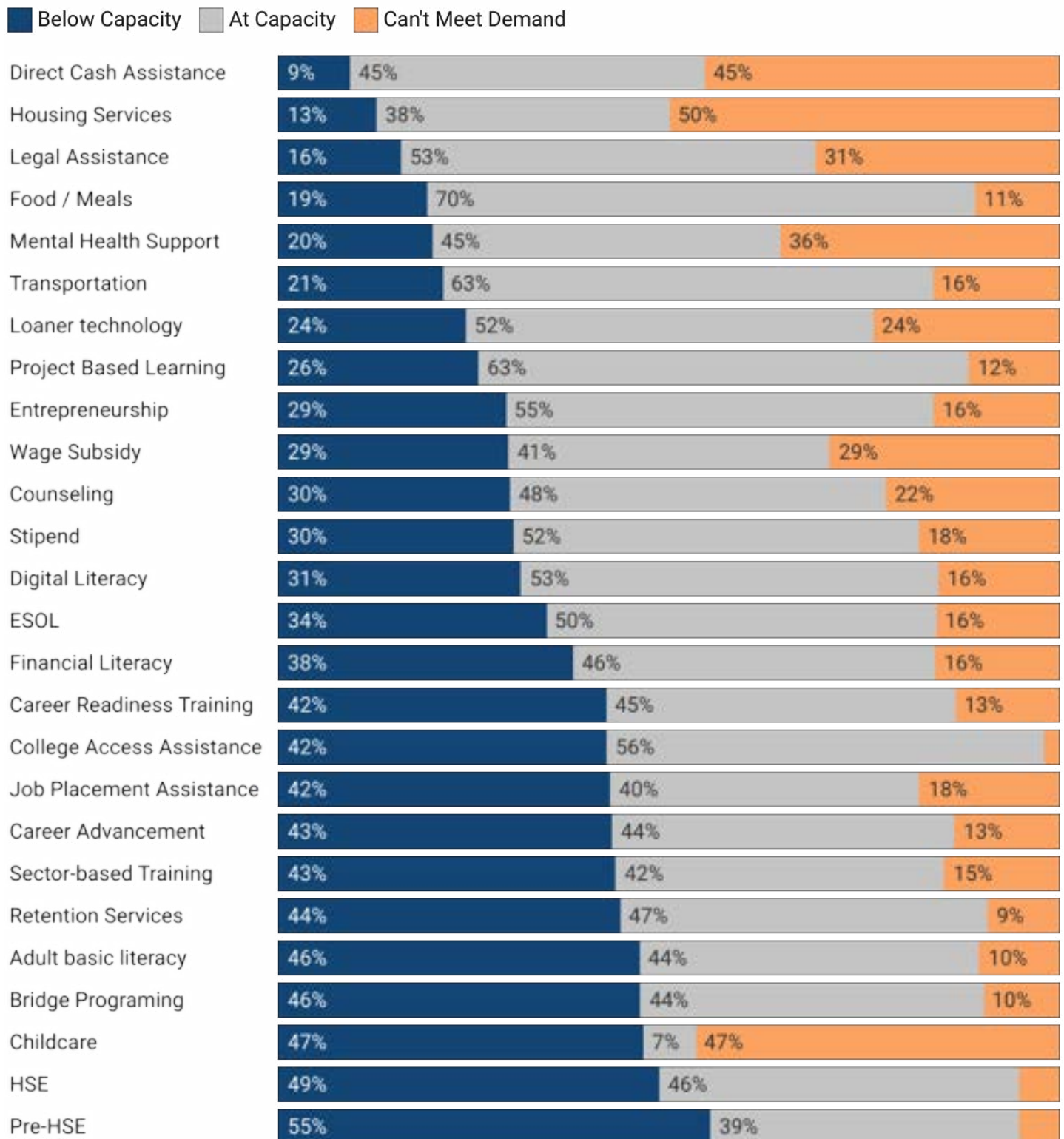
meaningful and fulfilling. These changed preferences took place against a backdrop of soaring rent and increased prices for goods and services. While these shifting priorities and career goals are certainly understandable for program participants, the shift does create challenges for the workforce development system and its practitioners, as many of the jobs no longer desired by jobseekers are often entry points into the workforce, and can provide the experience needed to gain better-paying, career-track positions. However, the inherent tension between the low wages, inflexible schedules, and in-person requirements offered by these jobs, and the evolving needs of workers is undeniable, and must be addressed.

The figure below demonstrates that some programs and services (direct cash assistance, housing services, legal assistance and childcare) are overwhelmed by demand by program participants. Federal pandemic assistance has largely ended, but thousands are still at risk of losing housing. Simultaneously, other measures of hardship,

such as applications for temporary cash assistance, Supplemental Nutrition Assistance Program (SNAP) and Medicaid, experienced by low-income workers in New York City are rising.²⁵ On the other hand, core workforce programs such as career readiness training, sector-based training, career advancement, and job placement assistance, which run across many organizations are below capacity. From our focus group interviews, we learned that workforce professionals expect this to change as workers reenter the workforce after depleting savings or finding childcare options. In a forthcoming report, we will analyze how the changing economic context, including “post-Covid” job openings, may catalyze a shift in sectoral training offerings. See *Figure 20*.



FIGURE 20. CHALLENGES IN MEETING DEMAND AND RECRUITING PARTICIPANTS FOR PROGRAMS



STAFFING CHALLENGES WITHIN THE SECTOR

Organizations also face serious challenges around both recruitment and retention of frontline staff, which impacts their ability to deliver high-quality services. As an indicator, as of June 22, 2022, there were 173 job openings amongst organizations represented on NYCETC's board as well as organizations who posted open positions in the NYC Employment and Training Coalition biweekly newsletter, which together included a total of 39 organizations. This represents an average of more than four open positions per workforce provider.

Many potential reasons exist for these staffing challenges. First, the Great Resignation is currently impacting workers, and employers across all sectors, including non-profit and social service organizations. The workforce development sector is not immune to this. However, according to data obtained in Workforce Professionals Training Institute's *Voices from the Frontline* initiative and 2020 and 2021 surveys of New York City frontline workforce development professionals, there are specific factors impacting workforce professionals' decisions to remain at their organization or seek alternative avenues for employment, including leaving the sector entirely.

Most notable is the issue of pay equity. As of 2020, 58 percent of frontline workforce professionals in New York City earn less than \$55,000 per year, the approximate median salary for the city as a whole. This is in spite of the fact that 74 percent of these professionals possess at least a bachelor's degree, as compared to 44 percent of the broader citywide working-age population. Furthermore, this salary has barely risen in the ten years since WPTI's 2011 study of the same workforce, *Deep in the Trenches*, in spite of a rising cost of living.²⁶ As a result of these low salaries, workforce professionals face serious financial pressures. Only 29 percent of *Voices from the Frontline* respondents agreed that their salaries were sufficient to cover living expenses, and only 16 percent felt confident that they could



cover a month's worth of expenses in an emergency.²⁷

In addition to low pay across the board, there exists an issue of pay equity across racial and ethnic lines, with workforce professionals of color frequently paid less than their White counterparts. Asian, Black, and Latinx workers are all more likely than their White colleagues in the field to earn less than \$55,000 annually, and this trend remains even when controlling for other factors like years of experience or the presence of a graduate degree.²⁸ The issue of racial stratification with regard to salary is also present with regard to advancement. Respondents to the *Voices from the Frontline* study also indicated a perception that workforce professionals of color are underrepresented at the highest echelons of the field, and that field and organizational leadership are not entirely representative of the frontline or the community served, specifically with regard to race. This is supported by data from a 2018 study by the City of New York and the Nonprofit Coordinating Committee of New York, which showed that of nearly 400 organizations surveyed, more than 70 percent had CEOs or Executive Directors who were White, cisgender men.²⁹

These issues, along with trauma, burnout, and other factors related to serving vulnerable communities throughout a multi-year pandemic and economic crisis, likely contribute to high rates of turnover and recruitment challenges facing the workforce development sector.

PRIORITIES

Nearly half of organizations said they are prioritizing maintaining, delivering, and improving their existing programming as their top importance (39 percent). Existing programming, scaling, and delivering competitive wages and benefits to staff were ranked as top areas of importance by organizations. Following these areas of importance, organizations also named program design and building out data collections systems as other important areas of organizational focus.

Covid quickly forced organizations to build new digital training infrastructures to deliver services remotely while simultaneously undergoing tight budgetary constraints.³⁰ Following the various periods of “reopening” and fading Covid-related mandates, many organizations resumed in-person instruction in smaller groups or adopted hybrid approaches. Consequently, many organizations are in the midst of reverting back to in-person programming, while still subsisting on diminished resources. Many are focusing on delivering existing programs, assessing the relative effectiveness of virtual and hybrid programs, and retooling program curricula and staff skills for returning to in-person programs while undergoing capacity and financial challenges in a changed landscape of both economic opportunities and social expectations. Currently, over a third of organizations said that all or most of their programs had returned to in-person. However, a third of organizations said they were continuing to deliver all or most of their programs in a hybrid system and just under a third said most or all of their programs remained virtual (34 percent hybrid and 29 percent virtual). See *Figure 21*.

FIGURE 21. CURRENT MODES OF PROGRAM DELIVERY



NEEDS

Though organizations face a daunting array of challenges, nearly all express a desire to scale if funds were available (92 percent). Most organizations identify securing robust funding as their primary obstacle to meeting the challenges of the moment. When asked to rank their top needs, over half of organizations ranked advocacy for additional funding as their top need (54 percent), followed by connections to employers (30 percent), and staff professional development (16 percent). See Figure 22.

FIGURE 22. RANKING OF ORGANIZATION'S TOP NEEDS (BY PERCENTAGE)



CONCLUSION

New York City's workforce development landscape is vast and diverse, composed of many different types of organizations ranging in size, scope, and budget who serve hundreds of thousands of New Yorkers each year. They provide training in a variety of in-demand sectors – with technology, construction, and healthcare at the top of the list – as well as other key workforce services, including job placement and retention support. These providers, who receive the majority of their funding from government sources, are located all across New York City in all five boroughs, and serve a large range of constituencies, including young adults, individuals with prior involvement with the criminal legal system, people experiencing homelessness and housing insecurity, displaced workers, and more.

Upon exploratory analysis of the data, distinct patterns have been identified across the workforce development sector that will be further analyzed in an upcoming report in Fall 2022. Examining the impact of Covid-19 on workforce providers, we observed a volatile or “pressure cooker”-type environment created by budget cuts and an increase in demand for services, as well as individuals being unable to participate in training programs due to lack of available financial and wraparound support services. Furthermore, we found challenges regarding resource allocation, conflicting programming priorities, and the rapid digitization of the field and the broader economy. Key takeaways include the following:

First, wrap-around supports, especially direct cash assistance and child care, are extremely low, impacting workers' ability to participate in training programs and ultimately creating additional barriers to entering the workforce.

Second, workforce development organizations noted that returning to in-person was both a priority and a challenge. During the pandemic, many organizations were forced to develop digital infrastructure and implement strategies to provide training services virtually while relying on diminished resources, as well as to ensure staff and participant safety. As vaccines arrived and the City underwent a slow transition back to in-person activities, hybrid instruction was adopted as a second phase. Currently, many organizations are attempting to revert back to in-person instruction with ambiguity over the most effective option (hybrid vs. virtual), which varies based on specific clients needs and interests. The data points to no real answer since providers are still experimenting with strategies, possibly due to two years of being reactive to Covid-related mandates, budget cuts and other obstacles. In-person instruction has become both a priority and a challenge, as providers are still addressing how to effectively implement such services while facing budget shortfalls and other concerns.

Third, as the data has shown, many service providers have increasingly taken a sector-based training approach, in which they develop a deep understanding of individual industries and sectors of the labor market, and focus on those sectors in order to improve the employment and career prospects of their program participants. The next report will offer analysis on how providers are reacting to the current labor market, and how they have utilized labor market data in developing or revising their sector-based strategies for programming.

Fourth, the majority of workforce providers receive the bulk of their financial support through government funding flowing via City agencies or funding streams (i.e. City Council funding, DYCD, HRA, DOE, etc.). This may point to an opportunity for State monies to play a larger role in advancing the City system. Specifically, providers currently have access to a one-time, \$175 million funding stream through the State’s “Workforce Development Initiative,” developed in 2018 to fund organizations statewide on projects focused on “emerging fields with a growing demand for jobs.”³¹ While city-based providers have the ability to access money directly from the State of New York, these providers have had far more difficulty winning proposals to access these funds, when compared to their counterparts in other parts of the state.³² More analysis will be conducted for the next report, and more support is needed across the City’s workforce system overall to access these funds.

In spite of these challenges, which must be addressed, there are reasons to remain cautiously optimistic. On June 13, Mayor Adams and the City Council passed the FY23 budget of \$101.1 billion. This budget includes funding for health, safety, and community programs and services. This budget adds \$750 million to the Rainy Day Fund, 60 terms and conditions that strengthen oversight on DSNY, DOC and NYPD, and 18 new units of appropriations. Key investments relevant to the workforce field include:

- \$79.4 million to expand Summer Youth Employment to 100,000 slots
- \$19.7 million to double Work, Learn, and Grow slots for year-round youth employment
- \$33.4 million to expand career and technical training
- \$60 million for a cost-of-living adjustment for human service workers
- \$44.1 million to the Departments of Parks and Recreation’s maintenance and summer workforce programs; and additional funding for urban park rangers, green thumb gardeners, and forest management
- \$20 million for adult literacy
- \$9.2 million for the Low Income Childcare Voucher

This budget, as well as the Mayor’s Executive Order 22³³ issued in August 2022 which empowers the Mayor’s Office for Talent and Workforce Development, convene a Future of Workers Task Force, create an Interagency Talent and Workforce Development Cabinet, and provide an important starting point for investment in workforce development across New York City. However, as stated above, there exist real opportunities to more fully strengthen the workforce system, including support for pay equity, wraparound services for participants, and development of digital infrastructure to better meet economic and labor market conditions.

Stay tuned for our next report, scheduled for Fall 2022, which will dig deeper into many of these issues and offer recommendations on how the New York City workforce system can more effectively meet the challenges posed by the current moment.

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