

# HOW TO USE QUALITATIVE RESEARCH IN A WORKFORCE COLLABORATIVE

Prepared by Business Government Community Connections  
August, 2017

## Introduction

The purpose of this briefing paper is to provide practical guidance for workforce collaboratives interested in embedding qualitative research into their Learning Community Partnership (LCP)<sup>1</sup>. The content in this report is informed by the work of SkillUp Washington, a Seattle-based workforce funder collaborative. The qualitative research conducted by SkillUp has acted as a catalyst for program improvements and funder investments. This work complements, and is intended to be reviewed in tandem with, quantitative approaches. The qualitative research strategies presented in this report are aimed at developing a comprehensive view of how different workforce development programs are working from the vantage point of workforce participants, instructors, navigators, college administrators, employers, and other key partners. Qualitative data provides insight into the work under way, setting the stage for LCP members to collectively analyze their work and resolve challenges.

## Create a Rich and Layered Data Trail Step One—Establish a Learning Community

This briefing paper is based on the assumption that the workforce collaborative or partnership has an LCP in place that includes people who plan, manage, implement, and share responsibility for improving or sustaining the program. It also assumes that LCPs: (1) have a strong interest in learning why, when, and how their workforce programs are meeting their goals, contractual requirements, and other shared LCP-determined knowledge and capacity building aims; (2) place a high priority on understanding the qualitative factors accelerating/hindering different outcomes, including enrollment, certificate and credential acquisition, training, job placement and retention rates, and employer engagement; and (3) are interested in integrating and utilizing qualitative and quantitative data to learn about the work under way in order to make timely program improvements.

## Evaluation Tools: Using Qualitative and Quantitative Information

The National Fund is committed to tracking results, measuring value for its stakeholders, leveraging information and evaluations and sharing insights throughout its network. In order to understand and amplify its impact, it works to improve the evaluation and learning capacity of its partner communities. The Evaluation Tools series provides tangible advice and recommendations on how local organizations including regional funder collaboratives and industry partnerships, can collect and utilize qualitative and quantitative information to improve their work. See <https://nationalfund.org/learning-evaluation/> for more information.

## Step Two—Plan, Implement, and Analyze Qualitative Data

Actions (a) through (e) below are presented as suggestions for learning communities or LCPs to pursue in order to plan, gather, and use qualitative information.

### (a) Identify Research Questions

In order to ensure that the qualitative research questions reflect the priorities of the LCP, it is important to:

- ▶ *Identify key qualitative questions* that the LCP members want to be able to answer “along the way” to tell why the project is or is not progressing as planned toward achieving contractual outcomes. (Refer to Appendix A.)

<sup>1</sup> The author encourages workforce practitioners to establish a learning community or a LCP in order to discuss and use the findings from the evaluation to improve the effectiveness of the program and its services. It is important to gather multiple stakeholder perspectives from qualitative evaluation and to discuss the findings as a group in order to benefit from the shared dialogue and prioritize next-step, forward-thinking actions.

- *Design qualitative questions* to garner similar information from different persons, so they are positioned to create a more nuanced and comprehensive view of how workforce participants are progressing in training. Examples of case studies conducted by SkillUp can be found at [www.skillupwa.org](http://www.skillupwa.org)<sup>2</sup>.

### **(b) Choose Qualitative Data Collection Methods**

The LCP may want to select representative samples of participants who agree to be the LCP's "consultants" by participating in different qualitative research activities. These individuals could receive stipends for their contributions of time and expertise. These participants should complete necessary consent forms to ensure they know how the information will be collected, shared, and used. They could also include this experience in their resume. Qualitative data collection methods focused on participants may include the LCP consultant conducting:

- Direct observations of participants in school, training, job search, work-based learning, or employment;
- Participant interviews in person, by telephone, and via email;
- Site visits to shadow and document the experiences of participants at school or work; and
- Life history interviews at multiple points in time when participants are in the workforce program.

To get a 360-degree view of the work underway, qualitative data collection procedures designed to track the overall effectiveness of workforce programs may include:

- Surveys, interviews, or focus groups with career navigators, instructors, employers, and other staff and external partners who provide vital services and supports to workforce participants. An example of an employer survey conducted by SkillUp Washington can be found at [www.skillupwa.org](http://www.skillupwa.org)<sup>3</sup>.
- Documenting why and how the workforce development pathway programs, policies, practices, or partnerships are working well or need to be changed to better support workforce development participants and improve their effectiveness, drawing upon the input of policymakers and other partners. All data should be cleaned, coded, and entered into an electronic database.

### **(c) Document Participant Pathways to Change**

Qualitative data collectors (external evaluators and/or existing workforce program staff or partners) may want to pay particular attention to documenting pre/post changes in the lives of participants at set intervals to determine

reasons for changes, and to inform timely interventions. The cost will vary depending on the complexity of the evaluation. There are advantages in terms of objectivity to hiring an external evaluator who specializes in disciplines such as ethnography or anthropology and mixed methods research. There may however, be cost advantages to having existing staff with those skills conduct qualitative evaluations. As part of this process, workforce program staff may decide to:

- Administer data collection tools at more than one point in time to systematically document changes in such areas as participant reports of self-motivation, self-esteem, self-efficacy, and goal orientation, and identify the "drivers" (particular resources, practices, or policies, etc.) responsible for promoting these changes. LCPs should set aside time to select or design information-gathering tools that reflect the particular philosophy, participant population, and approach of the program. These could include looking at validated tools that measure hopefulness about the future, college and career readiness, or perceptions of the future. Most importantly, tools should be administered consistently at times that make sense, given the design of the program.
- Document changes in subsidy, tuition, and life domain status in critical areas, such as housing, transportation, financial education, and child care. Customize pre/post tracking of the life domains to include those which are most likely to influence participant training and career trajectories.
- Collect information which shines a light on the lives of workforce participants and circumstances they need to negotiate, such as fear of math; extreme poverty; homelessness; child care; mandatory court appointments; compliance with urinalysis testing requirements; balancing school, family, and work, in order to focus on skills and training to identify gaps in services; and effective interventions.
- Use every opportunity during participant interviews and discussions to document their recommendations for improving different parts of programs. Whenever possible, identify those interventions which are regarded as evidence-based, promising, or problematic.

<sup>2</sup> <http://skillupwa.org/wp-content/uploads/SkillUp-IMA-Case-Study.pdf>; <http://skillupwa.org/wp-content/uploads/WOS-CaseStudy.pdf>; and <http://www.portjobs.org/policy-a-research/2-general-policy-a-research/30-policy-a-research-2>

<sup>3</sup> <http://skillupwa.org/wp-content/uploads/SUP-MAPPsurvey.pdf>

- Track the factors which influence student success in internships, on-the-job training, work-based learning, job search, and other activities leading up to employment. Include strategies to document the participant, career navigator, and instructor and employer perspectives.
- Document reasons why participants drop out or successfully complete training and find or keep jobs, drawing upon the perspectives of participants and career navigators.
- Use qualitative data as a vehicle for discussing topics that are often overlooked, but could be more highly elevated in workforce development. For example, the Employment Hope Scale, which can be administered at multiple times to participants, focuses LCP conversations on the relationship between participant reports of psychological and economic self-sufficiency, and how to build the hopefulness of participants. Similarly, qualitative questions can be designed to explore the role of behavioral economics on economic decision making. Though these topics are often not foremost in the discussions about “Why we are / are not reaching employment performance outcomes,” interviews conducted by SkillUp Washington suggest that their inclusion in LCP discussions is beneficial and informs career navigation, service referrals, partnerships, and instructional strategies. Information on the Employment Hope Scale is available at [www.skillupwa.org](http://www.skillupwa.org)<sup>4</sup>.

This tool does not require specialized skills to learn how to administer. Using the above tool, an example of a pre/post measure to be documented during young adult interviews to identify changes in **psychological empowerment** includes:

***I have the strength to overcome any obstacles when it comes to working.***

An example of a pre/post measure to be documented during young adult interviews to identify changes in **futuristic self-motivation** includes:

***I feel energized when I think about future achievement with my job.***

An example of a pre/post measure to be documented during young adult interviews to identify changes in **utilization of skills and resources** includes:

***I am able to utilize my skills to be employed in a good job.***

An example of a pre/post measure to be documented during young adult interviews to identify changes in **goal orientation** includes:

***My current path will take me to where I need to be in my career.***

#### (d) Analyze Data

- Collect and merge qualitative data, including descriptive data, demographic data, previous education and employment, and quantitative data (academic performance, learning gains, training completion, credentials, job placement, retention, and post-program education/training/wage outcomes) to create a greater understanding of the factors which promote participant skill gains, employment, and income.
- Explore the merged data set through a social equity lens to determine if there are trends that increase an understanding of how class demography, composition, use of support services and incentives, role and type of referral partners, assessment, and instructional and employer engagement approaches are working or need to be adjusted to improve workforce program quality.
- Review the results to discuss divergent feedback, and identify areas where services need to be coordinated differently to avoid repetition, or to better incorporate hindsight learning into next-step actions.
- Continually work with LCP data contributors to ensure that the data collection and analysis processes work efficiently. The idea is not to create a torrent of words, but to create a way for meaningful summaries of the narratives to be efficiently stored, analyzed, and used. It is particularly helpful at the beginning of projects to develop simple data collection plans, and protocols for when and how to collect, store, share, and use narrative or qualitative data. This plan will need to be revisited and updated at LCP meetings.

### Step Three—Act On Learning

The LCP should meet on a routine basis to review and discuss the results of the qualitative research and merged datasets to share their observations about what the data means, and recommend changes needed to improve workforce program practices. One of the main goals of the LCP should be to “Act on Learning” in real time, and to create a legacy of information holders, sharers, and doers who take what they learn and apply it to the project under way as well as to their other work.

<sup>4</sup> Hong, P.Y.P., Song, I., Choi, S., & Park, J.H. (2016). A cross-national validation of the Employment Hope Scale in the U.S. and South Korea. *Social Work Research*, 40, 41-51.

Examples of questions taken from the SkillUp Washington work are presented in Appendix A charts to illustrate the types of qualitative research questions that catalyze dynamic LCP conversations, and frame and inform actions. These questions are sorted by key respondent groups (participants, career navigators, instructors, and employers) to demonstrate how they can be adjusted to readily collect real-time feedback from persons involved in workforce development programs, looking at the work way from different vantage points.

### Summary

The LCPs use of qualitative data will be most productive when data is gathered from multiple audiences at set time intervals, discussed and used soon after to ensure timely intervention. The qualitative data brings workforce performance data to life and provides insight into how different partners can all work together in a forward-thinking manner, to use their shared experiences to promote the success of participants and respond to the hiring needs of employers. This information, when strategically timed and integrated, paves the way for all involved to capture impressions about the work to date and cultivate this information to inform the work that lies ahead. In the world of workforce development, it is particularly important to have this bank of learning as staff turnover and limited-term funding contribute to cycles of reinvention, rather than capitalizing on the past learning and wisdom of all involved.

Please refer to Appendix A. Examples of Qualitative Questions to Embed in Workforce Learning Community Partnership for ideas about qualitative questions that LCPs might want to explore to improve the quality of their workforce development programs.



SkillUp Washington  
Photographer: Ryan Castoldi



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Photographer: Ryan Castoldi

## Appendix A. Examples of Qualitative Questions to Embed in Workforce Learning Community Partnerships

Program Component	Participant	Course and Career Navigator	Instructor	External Partners	Employer
<b>Outreach</b> <b>Recruitment</b> <b>Enrollment</b>	<ol style="list-style-type: none"> <li>1. How did you find out about this program?</li> <li>2. What were the main reasons you decided to enroll in the program?</li> <li>3. What did you hope would happen as a result of participation?</li> </ol>	<ol style="list-style-type: none"> <li>1. Who are your main referral partners?</li> <li>2. What were the most / least effective outreach and recruitment strategies, tools, and partnerships used by you and your referral partners?</li> <li>3. What other approaches would be more effective?</li> <li>4. Did you reach your enrollment goals for the project? Why / why not?</li> <li>5. What needs to change for you to implement more successful recruitment strategies?</li> </ol>	<ol style="list-style-type: none"> <li>1. Were the participants enrolled in the program appropriate for the type of course/ training? Why / why not?</li> <li>2. If not, what kinds of changes in pre-screening or recruitment need to occur in future classes?</li> </ol>	<ol style="list-style-type: none"> <li>1. How did you prioritize /make referrals to the program?</li> <li>2. Did participants you referred get accepted / decide to enroll? Please explain. Why / why not?</li> <li>3. Do you have any recommendations for streamlining outreach and recruitment?</li> </ol>	<ol style="list-style-type: none"> <li>1. What has your involvement been, if any, in referring participants to the program?</li> <li>2. Do you regard this program as a useful referral source for hiring qualified candidates to your company?</li> </ol>

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<b>Assessment</b>  <b>Individual Education and Employment Plans</b>	<ol style="list-style-type: none"> <li>1. What kinds of assessments have you taken? What were the results?</li> <li>2. Did these assessments play a role in helping you identify your academic skills, career skills, or interests?</li> <li>3. Did the assessment results help you develop a career plan?</li> <li>4. Have you discussed your progress with anyone? Please explain.</li> </ol>	<ol style="list-style-type: none"> <li>1. What kinds of assessments do you administer to participants?</li> <li>2. Do you share the results with participants and/or with other partners?</li> <li>3. Do you use the results of assessments to develop career plans?</li> <li>4. Do you update the status of participant progress in partnership with participants?</li> <li>5. Does this process work well or not? How would you improve it?</li> </ol>	<ol style="list-style-type: none"> <li>1. What kinds of assessments did you administer to participants?</li> <li>2. How do you share and use the results with participants or other staff?</li> <li>3. Are there any other kinds of assessment tools or strategies you would recommend?</li> <li>4. Do you use the results of assessments to develop or adapt curricula and inform instructional approaches?</li> </ol>	<ol style="list-style-type: none"> <li>1. When the participant is enrolled in the workforce program, do you continue to assess their progress or provide them with other support?</li> <li>2. What kinds of suggestions do you have for streamlining assessment processes across agencies to reduce duplication?</li> </ol>	<ol style="list-style-type: none"> <li>1. Have you shared information with the workforce training program that may increase their capacity to assess participants and determine their interest and ability to succeed in your company?</li> <li>2. Are there any other types of assessments that would be useful to participants?</li> </ol>

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<p><b>Course Persistence</b></p> <p><b>Certificate</b></p> <p><b>Credential</b></p>	<ol style="list-style-type: none"> <li>1. How are you doing in the training?</li> <li>2. Do you feel that you are progressing well?</li> <li>3. Are there any other types of assistance that you need to do better?</li> <li>4. What have you liked / not liked about the training?</li> <li>5. What kinds of resources/approaches help you learn faster?</li> <li>6. Have you been able to earn the credentials/certificates that you hoped you would? Why or why not?</li> <li>7. Do you feel that you will complete the class? Is anything standing in the way of completing?</li> <li>8. Now that you are getting closer to completing training, what are your next steps—getting a job or going to school?</li> </ol>	<ol style="list-style-type: none"> <li>1. What kind of assistance are you providing to participants? Are these strategies increasing participant persistence in class?</li> <li>2. Are other types of assistance or resources needed?</li> <li>3. What strategies do you feel work best?</li> <li>4. Which strategies need to be improved? Where are the biggest gaps in supporting the course persistence of participants?</li> <li>5. Are your program completion rates and learning-gain expectations occurring as you planned?</li> <li>6. What could be done to improve these rates?</li> <li>7. Have any participants dropped out of the class? Why? In hindsight, is there anything that might have happened to prevent them from dropping out?</li> </ol>	<ol style="list-style-type: none"> <li>1. What kinds of instructional strategies are you providing to participants to support their skill gains and course persistence?</li> <li>2. What are the biggest obstacles you face in supporting course persistence of participants?</li> <li>3. Which strategies do you feel work best? Which need to be improved?</li> <li>4. Do you feel that most participants will complete the course/training? Why or why not?</li> <li>5. Are your program completion rates and learning gains occurring as you planned?</li> <li>6. What would improve completion rates and learning gains?</li> </ol>	<ol style="list-style-type: none"> <li>1. Are you still engaged with participants when they are enrolled in training?</li> <li>2. Are you providing assistance or support that is helping participants persist in training? If yes, how?</li> <li>3. What do you think are the biggest gaps in persistence resources?</li> </ol>	<ol style="list-style-type: none"> <li>1. Does your company provide instruction, curricula review or design, or other classroom support to participants?</li> <li>2. If not, would you be interested in doing so?</li> <li>3. What do you think is the most important way employers could be engaged in course/training programs?</li> <li>4. Are you satisfied with the type of training that students are receiving? What improvements do you recommend?</li> </ol>

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Program Component	Participant	Course and Career Navigator	Instructor	External Partners	Employer
<b>Internships</b>  <b>Work-Based Learning</b>  <b>On-the-Job Training</b>	<ol style="list-style-type: none"> <li>How are you doing in your internship learning experience?</li> <li>Is it the type of experience you wanted to pursue?</li> <li>What are your career goals? Will this get you closer to achieving those goals?</li> <li>Do you feel that you are progressing well?</li> <li>Are there any other types of assistance that you need to do better?</li> <li>What have you liked / not liked about the work experience?</li> <li>Do you want to find a permanent job in the company where you are doing your work experience? Or do you feel that you need additional training or help looking for other types of jobs instead?</li> <li>What kind of performance review do you feel you will get from your employer?</li> <li>Do you feel like the work experience opportunities provided to participants are helpful? Why or why not?</li> <li>Is there anything that you learned in your work experience that you wish you had learned in the training?</li> </ol>	<ol style="list-style-type: none"> <li>What kind of work-based learning opportunities are you providing to participants?</li> <li>Are these strategies increasing their employment skills or future employability?</li> <li>Are other types of assistance or resources needed? What strategies do you feel work best? Which need to be improved?</li> <li>Where are the biggest gaps in supporting the work experience of participants?</li> <li>Are your work-based learning-gain expectations occurring as you planned?</li> <li>Are you assessing and using the results of work-based learning assessments to provide additional career guidance and job development support to participants?</li> <li>Do you feel like the work experience opportunities provided to participants are appropriate?</li> <li>What major work experience challenges are participants experiencing on the worksite?</li> <li>What are you doing to address these challenges?</li> <li>Are you recommending changes in the curricula to address these issues?</li> <li>Are you developing new work-based learning opportunities?</li> </ol>	<ol style="list-style-type: none"> <li>What kinds of work-based learning strategies are you providing to participants to support their skill gains and course persistence?</li> <li>What are the biggest obstacles you face in supporting the work experience success and persistence of participants?</li> <li>Which strategies do you feel work best? Which need to be improved?</li> <li>Do you feel that most participants will complete their work-based learning experience? Why or why not?</li> <li>Do you update your curriculum or provide brush-up skills to participants who are experiencing problems in their work-based learning opportunities?</li> </ol>	<ol style="list-style-type: none"> <li>Are you still engaged with participants when they are enrolled in work-based learning?</li> <li>Are you providing assistance or support that is helping participants persist in their internships / work experience opportunities?</li> <li>If yes, what do you think are the biggest gaps in work-based learning experiences?</li> </ol>	<ol style="list-style-type: none"> <li>Does your company provide internships or work-based learning experience opportunities to participants?</li> <li>How do you select participants and assess their performance?</li> <li>Do you feel that participants are well-prepared for internships or do they need additional preparation or training?</li> <li>If so, what kind? Are most completing their internships? If not, why are they dropping out?</li> <li>Are you likely to hire participants who do well on their internships? Why or why not?</li> <li>Based on what you have observed about participant work performance, do you have recommendations for how they could be better prepared?</li> </ol>

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Program Component	Participant	Course and Career Navigator	Instructor	External Partners	Employer
<b>Job Search</b>  <b>Job Placement</b>	<ol style="list-style-type: none"> <li>1. Did you connect to employers when you were in the training program?</li> <li>2. Did any of these employers provide you with job leads or job offers?</li> <li>3. What kinds of support did you receive to find a job?</li> <li>4. Did you receive job leads or look for work on your own?</li> <li>5. What were your experiences looking for work?</li> <li>6. How long did it take for you to find a job?</li> <li>7. Did you receive job rejections or no reply from some employers?</li> <li>8. Did you look for or find a job that was training related? Why or why not?</li> <li>9. What approaches do you think would help other participants who are looking for work get a job?</li> </ol>	<ol style="list-style-type: none"> <li>1. What kinds of job search / job placement support do you provide participants?</li> <li>2. Do these services result in participants receiving job leads or interviews?</li> <li>3. What kinds of issues are supporting or interfering with participants' job searches?</li> <li>4. Are most getting the types of jobs they want? Why or why not?</li> <li>5. What kinds of feedback are you getting from employers about the best ways to prepare participants for interviewing and demonstrating their readiness for work?</li> <li>6. How/when are you sharing this information with participants and teachers?</li> </ol>	<ol style="list-style-type: none"> <li>1. What is your role in preparing participants to compete for jobs or identify job leads?</li> <li>2. Do these strategies include using technology, preparing resumes, or other types of exercises during class time?</li> <li>3. Which work best/least?</li> <li>4. Do you get feedback from employers about the skills they want job applicants to tout and demonstrate in their applications and interviews?</li> <li>5. How are you ensuring the instruction/ curricula are up to date and include the techniques and information necessary to help participants increase their job competitiveness?</li> </ol>	<ol style="list-style-type: none"> <li>1. Does your agency provide any job search or job placement support to participants? If yes, what type? For example, do you provide bus tickets, work clothes, access to computers or benefit planning, or other resources to help participants in their job search?</li> <li>2. Do you have any impressions or feedback about how participants regard their job search experiences?</li> <li>3. Do you have any recommendations for how these experiences could be better supported by your agency or other community providers?</li> <li>4. Do you refer participants to child care or other resources that are essential to look for jobs?</li> </ol>	<ol style="list-style-type: none"> <li>1. Have you provided mock interviewing or job search coaching support to participants?</li> <li>2. Have you been involved with sending job openings to the program? If yes, what have the results of these efforts been?</li> <li>3. Have you been able to meet the hiring needs of your company? Why or why not?</li> <li>4. Do you have recommendations for how to increase the job competitiveness of participants who apply at your company?</li> </ol>

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Program Component	Participant	Course and Career Navigator	Instructor	External Partners	Employer
<p>Post Placement</p> <p>Job Retention</p> <p>Job Advancement</p>	<ol style="list-style-type: none"> <li>How are you doing in your job? What kinds of successes or challenges are you encountering? In hindsight, do you wish you had received other types of training to be better prepared?</li> <li>Do you think you will stay in this job? Why or why not? Have your career goals changed? If yes, how? What is your advice to other participants interested in working at this company?</li> <li>What is the main thing you need to do to advance in this company?</li> <li>What are the career paths that lie ahead? Do you think you will need to take additional training to be promoted? If yes, who offers this training?</li> </ol>	<ol style="list-style-type: none"> <li>Do you follow up with participants after they enter jobs?</li> <li>What kinds of retention services do participants need? What do you provide?</li> <li>What do you think are the major barriers to retention that participants face?</li> <li>In hindsight, are there changes in the career preparation of participants that need to happen?</li> <li>What kinds of help have you provided / do you continue to provide to students to advance in their jobs, and to anticipate and plan for changes that may occur in their benefits when they start to earn more income?</li> </ol>	<ol style="list-style-type: none"> <li>What do you know about the post-training employment experiences of participants?</li> <li>Are they getting jobs?</li> <li>Are you changing the curricula based on what you hear about participant and employer perceptions of participant readiness for, and performance in, jobs? If yes, how are you using this information?</li> </ol>	<ol style="list-style-type: none"> <li>Are you providing training supports to participants that influence their job retention? If yes, what types?</li> <li>What do you feel are the main obstacles to job retention?</li> <li>If you are providing subsidies or other support services to participants, are they going to continue, be reduced, or end when the participants begin to earn more income?  How do you think this will influence their job retention?  Are you helping them anticipate and address these changes?</li> </ol>	<ol style="list-style-type: none"> <li>What are the main retention issues facing the participants you have hired?</li> <li>Are they well-prepared for jobs? If not, how could they be better prepared?</li> <li>Do you regard this training program as a main recruitment resource to your company? Why or why not?</li> </ol>

Prepared by  
Business Government Community Connections  
22 West Armour Street  
Seattle, WA 98119  
Telephone: (206) 619-0808  
bgcc1@comcast.net  
<https://bgccseattle.wordpress.com/>



TEL 202-223-8994 | [info@nationalfund.org](mailto:info@nationalfund.org)

1730 Rhode Island Ave NW #712, Washington, DC 20036

[WWW.NATIONALFUND.ORG](http://WWW.NATIONALFUND.ORG)

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