United Planning Organization—Training Innovation & Social Enterprise Management
Our intent with our job skills training programs, is to help people who are economically disadvantaged go from where they are now to where they need to go, which is qualifying for living wage jobs.

– Dana Jones, Executive Director, United Planning Organization, Washington, DC

United Planning Organization (UPO) is a Community Action Agency with a lengthy history of helping low-income residents of the District of Columbia become self-sufficient. Since it was awarded its first grant in 1962 by the Ford Foundation, to coordinate human services in DC, UPO has been changing the lives of some of the most disadvantaged people ever since. At the onset of the 2007 “Great Recession” the hand writing was on the wall for businesses and industries all across the nation. Businesses, particularly non-profits, would be one of the first to be affected by shortfalls and funding cuts that were once their sole source of their funds. By 2008 inflation levels were at historic levels.

UPO is located in one of the most economically strong areas within the United States. In fact, CNN Money reported in September 2010 that Washington, D.C.’s workers enjoy the highest salaries of any major U.S. city, with a median household income of $85,198. Yet, there are still large income disparities in the city’s population.

When UPO opened its Green Capital Home Improvement Center and its Weatherization Training Center to increase jobs for the unemployed and improve job skills, DC had just seen an increase in its residents living in poverty by 11,000 people. This increase was its largest increase in fifteen years. With UPO being one of the oldest community organizations in the city, its leaders knew it must become the trailblazer to spur job growth in the District of Columbia.

This case study provides a detailed overview on how an urban Community Action Agency developed an eco-friendly home improvement social enterprise using seed money from the American Recovery and Reinvestment Act (ARRA) funds and leveraging its existing program funds to enhance job creation services. The purpose of the venture is to train underserved residents in the community to become better prepared to obtain living-wage jobs while sustaining its programs under its Green Technology Division. The practices outlined in UPO’s Green Capital Weatherization Training Center and Green Capital Home Improvement represent promising practices which can be replicated to create employment opportunities in both environmentally beneficial and conventional fields for agencies operating across the nation.
MISSION

UPO's mission is very simple: To unite people with opportunities.

Green Capital Weatherization Center and Green Capital Home Improvement fulfills the agency’s mission by providing a job training resource for eligible low-income individuals, the broader community and businesses in need of staff training. Trainees include parents of UPO's Head Start program, homeless and transitioning residents and military vets. The agency achieves its goals to train and place participants primarily by partnering and contracting with agencies that provide services for their targeted customer. In addition to helping homeowners of the district save on their utilities, providing jobs and business opportunities, both programs impact the environmental by reducing the demand on energy systems and reducing the amount of harmful greenhouse gas emissions. This case study is an overview of United Planning Organization's innovative approach to create a green job training social enterprise that is replicable and sustainable far beyond the ARRA funds that were used to initiate the venture.

Field Tested Best Practices Described in this Case Study

- Creating economic security for unemployed, under-employed and transitioning adults through job skills training
- Implementing a coordinated strategy around job creation, employment and training by collaborating with established neighborhood agencies serving the same population.
- Creating new initiatives, such as its social enterprise targeting green jobs and careers.

Unique to this Case Study

- Research and development of a state-of-the-art technology and training center for “green” job skill development for all populations.
- Social enterprise development and sustainability, which leverages existing resources
- Ninety-eight percent of the participants of the Weatherization Training Center were ex-offenders and at the time that UPO started the program, no other community agency had a program for this population.

KEY SERVICES AND PROGRAMS

Green Technologies Weatherization Training Center (WTIC) | UPO's Weatherization Center is a department of the United Planning Organization Green Technology Division which offers a full range of competency-based training courses and seminars for individuals and organizations interested in learning the disciplines in residential energy conservation. Incorporating classroom and field training, students obtain certificates in:

- Weatherization Technician
- Crew Chiefs
- Installer
- Energy Auditor
- Budget Analyst
- Building Professional Institute certification

Green Capital Home Improvement (GCHI) | GCHI is UPO's for profit social enterprise that provides jobs for residents in the District of Columbia in the field of weatherization and green home improvement technology operation. This enterprise employs low-income residents who become certified Building Professional Institute (BPI) technicians and receive an average of a $19 per hour upon graduation and employment placement.
WHAT MAKES THE PROJECT GREEN?

• Technicians/Crew Chiefs are trained in using recycled and reusable materials for reuse during home energy retrofits
• The use of products that reduce the impacts of renovation
• Home renovation that includes the installation of energy efficient products and measures that reduce energy demand, therefore lowering pollution.
• Shared vehicle transportation and “buy local” policies, which lessens demand on non-reusable resources and helps lower harmful chemical pollutants from exhaust fumes.

CHALLENGES

• How do you find space to operate a weatherization training center with cutting edge technology in an over populated urban area?
• How do you convince staff and board to start a for profit venture for the same services the organization has offered at no charge for nearly twenty years?

HISTORY AND BACKGROUND

The United Planning Organization has nearly five decades of helping disadvantaged people obtain self-sufficiency. In 1962 when it began as an agency dedicated to coordinating the human service needs and facilities in the nation’s capital, John F. Kennedy was the president of the United States. The organization had already been operating during some of the most distressed and trying times for poor people and minorities. Its residents would not benefit from the relief of discrimination in housing, voting rights and public accommodations until two years later in 1964 when President Lyndon B. Johnson, enacted the Omnibus Civil Rights Bill banning this type of discrimination. On August 20, 1964 when President Johnson passed the Economic Opportunity Act, UPO began its first year as a Community Action Agency. The agency no longer had to rely solely on the Ford and Meyer Foundation grants it started with. It now had $15.8 million dollars to establish eight neighborhood development centers, begin a Neighborhood Youth Corps, fund a model school system, operate a pilot Head Start program, launch the community credit union movement (funding loans to three start-up credit unions) and establish a Neighborhood Legal Services Program, as well as a Small Business Development Center.

End to end it is difficult to locate an area of the District of Columbia that the United Planning Organization has not impacted. Today, UPO operates ten different departments and over 78 programs and services. It funds and invests in over fourteen city services operated by other nonprofit agencies. UPO has eighty locations and employs a staff of 360 people on a $47 million dollar operating budget.

WHAT UPO DOES: EXEMPLARY PRACTICES

An exemplary practice is defined as an innovative and consistently applied policy, process, practice or procedure that takes a comprehensive approach to developing and implementing activities using strategies that are related to the intended service, recipients and community. The practice model is culturally competent, data-driven, measurable, and replicable and incorporates a method for
documenting programmatic results*. United Planning Organization’s Green Technology Division reflects exemplary practices in the area of green job creation and field training. This case study provides a full spectrum of how UPO was able to create an urban weatherization training center for residents with barriers to employment and develop a social enterprise to sustain their training center. UPO has the only community based organization in the District that is approved by the DC Department of Energy and Environment. The programs discussed in this case study are:

- UPO Weatherization Training Center
- Green Capital Home Improvement

**UPO WEATHERIZATION TRAINING CENTER-HIGH QUALITY TRAINING**

Urban areas lack the space that many suburban or rural areas have for a full-scale training facility that can accommodate two single family home training models. “When researching this project,” Mr. Jones began, “I looked at best practice models to determine what technology we could bring to the urban area we serve that would be adequate for the space we had available to us, to make sure students are trained using the most up to date equipment in the industry.”

UPO participates in the U.S. Department of Energy’s Weatherization Assistance Program which has contributed to the 6.4 million low-income families across the nation that have benefited from permanently reducing their energy bills, increasing their property values, making their homes more energy efficient and positively impacting the environment. Concerned about the high number of clients who were unemployed after the “housing boom” exploded, Executive Director, Dana Jones, began exploring various nationally recognized green technology training models. When President Obama announced the release of the American Reinvestment and Recovery Act (ARRA) funds, Mr. Jones, had already done his research and was adamant about finding a way to bring a state-of-the-art weatherization training center to the inner city.

His research took him as far as California to meet with researchers at the University of California-Berkley, professors at Cornell University and Pennsylvania State College of Technology. He settled on replicating the Penn State model, as it focused on technology innovation. The Pennsylvania College of Technology (PCT), an affiliate college of Penn State University, is ranked by the Carnegie Foundation for the Advancement of Technology, Pennsylvania College of Technology as one of the top ten colleges in the northern United States. Like PCT, UPO’s training center has a multi-media classroom that seats twenty-four students and two lab stations dedicated to learning weatherization tactics, diagnostics and energy conservation.

Though Mr. Jones knew what kind of training center he wanted, the important question was, where would the center be located? The agency was approved for the ARRA funding shortly before it had an adequate location. Undeterred, the agency found a temporary location in a school, where it trained 244 students. Later, UPO located a site in a former warehouse on the Northeast side of Washington, DC.

The site was perfect, a warehouse located in a small industrial area, nestled behind a residential neighborhood. UPO negotiated a deal to lease 10,400 square feet of the 34,000 square foot property. The space is large enough to build two model training homes, a classroom that seats 24, offices and an open training area. The exterior has plenty of space for parking its weatherization vehicles as well as personal vehicles. At the charter of the facility, training students had the pleasure of getting hands on experience to build out the agency’s first facility for them and futures trainees. In order to ensure that participants will be competitive in the job market, UPO uses cutting edge technology to train its students. Some of the technology includes:

- **Retrotec Q46 Blower Door Fan System** | A Blower Door is a device that is capable of pressurizing or depressurizing a building and measuring the resultant air flow and pressure.
- **Bacharach 19–8104 Monoxor III CO Monitor** | The Bacharach Monoxor III is a continuous sampling instrument that accurately and quickly measures levels of CO between 0 and 2,000 ppm.
• **Bacharach 19–7075 Leakator Jr Combustion Gas Leak Detector** | This device pinpoints combustible gas leaks; tests appliances in residential, commercial and industrial applications; inspecting valves, regulators, and meters on gas equipment; and surveying gas pipelines.

• **Extech MO290 Psychrometer** | This handheld device measures humidity and moisture.

• **The House of Pressure** | The House of Pressure is a visual simulator which demonstrates pressure and air flow dynamics within a residence, using pressure diagnostics. It is a 1 foot by 3 feet training model of a single-family home, made of a clear, high-strength plastic laminate called Lexan that can be written on with a dry-erase marker. The interior of the House can be viewed from all four sides. It gives the instructor the ability to create and control air flow with working scale reproductions of the mechanical air distribution systems that are found in most homes.

In addition to these tools the Center has a multitude of other hand-held and standalone tools, equipment and simulators which are used to help students grasp the weatherization and home building skills and concepts. The Center employs seven highly skilled instructors, who collectively have over forty years of weatherization and building renovation experience.

Students spend 240 hours in the classroom and 320 hours in on-the-job field work with experienced contractors, for a total of 560 training hours for about two months. During the ARRA funding period, the Center received $2.5 million dollars, which served as seed funding to acquire and build out the warehouse training facility, purchase the equipment and provide stipends for the participants. Each student received the equivalent of $700 per hour until the training was complete.

Students of the training center are often referred through the business agreement UPO has with the Goodwill Industries Workforce Development Department. Ninety-eight percent of the participants from this program were ex-offenders and at the time that UPO started the program, no other community agency had a program for this population. The other two percent of the participants were classified as homeless. This created a demand for participants which caused the agency to seek the assistance of the District’s Department of Economic Development for a grant to provide scholarships for the students to attend the training. The fees for each student range from $250 to $1,450 per class. If participants from the Goodwill workforce development program are CSBG eligible they are immediately enrolled in UPO’s Employment and Career Development Department where they complete two weeks of job preparedness courses. The courses include:

• Resume preparation
• Job research assistance
• Interview techniques

Homeless participants who qualified under CSBG were referred to the organization’s Housing Counseling and Intervention department. As part of their counseling participants are referred to area shelters and available safe housing agencies.

The facility attracts a broad range of students. While some of the students are parents of UPO’s Head Start program, others are semi-skilled workers who want to enhance their skills to include residential energy conservation. The training center offers twelve courses ranging from weatherization diagnostics to OSHA safety to basic carpentry. The courses are each 7 hours and extend for 1 –5 weeks. The course fees range from $850 to $1,450 for each course. Low-income participant fees are paid by the referring agency; however individuals who are interested in enhancing their skills either pay out of pocket or obtain the fees from their employer.

Once entry-level technicians complete training they earn between $12.50 per hour to $20 per hour or more depending on their prior experience and skills. The WTC offers training the opportunity to advance their training through specialized certification in various disciplines to become a Building Performance Institute (BPI) certified technician. BPI certification is a nationally recognized and accredited certification issued by the Building Performance Institute. Participants enhance their skills in one or all of the following certifications:
Building Analyst – comprehensive, whole-home assessments, identify problems at the root cause and prescribe and prioritize solutions based on building science.

Envelope – quantify performance and prescribe improvements to help tighten the building envelope (shell), stop uncontrolled air leakage and optimize comfort, durability and HV/AC performance.

Residential Building Envelope Whole House Air Leakage Control Installer – implement measures to tighten the building envelope to reduce energy loss from air leakage and also reduce pollutants and allergens through air migration. Improve thermal comfort and energy efficiency through the proper installation of dense-pack insulation materials.

Residential Building Envelope Whole House Air Leakage Control Crew Chief – provide supervision, guidance and quality control to teams in the field working on: controlling air migration through the building envelope and also on the proper installation of dense-pack insulation materials.

Manufactured Housing – apply house-as-a-system fundamentals to the specific needs particular to the various types of housing technologies.

Heating – optimize the performance of heating equipment to help save energy and ensure occupant comfort, health and safety.

Air Conditioning and Heat Pump – diagnose and correct problems properly to achieve peak performance.

Multifamily – a-system fundamentals to diagnose problems and improve the performance of larger, more complex residential structures.

GREEN CAPITAL HOME IMPROVEMENT-HOME ENERGY AND FUNDING SUSTAINABILITY

Launching Green Capital Home Improvement is UPO's effort in helping Washington, DC become a much greener, eco-friendly city,” Dana M. Jones, UPO's president and chief executive officer stated about this innovative social enterprise. Green Capital Home Improvement (GCHI) is part of UPO's Green Technology Division. In line with the organization's philanthropic mission to unite people with opportunities, the Green Capital Home Improvement is an eco-friendly home improvement company that operates as a social enterprise of the organization. Through GCHI, UPO has established contracts with the District of Columbia, local businesses and nonprofit organizations. Taking into consideration that the ARRA funds, though helpful were great, but they were limited. How could the agency devise a way to fulfill the multiple program goals of providing job training, jobs for low-income people and helping low-income homeowners lower their utility bills? GCHI was the solution, by providing a city-wide environmental impacting service for all residents, as well as creating new jobs, training, and building its organizational capacity.

When UPO's home improvement enterprise was created in 2009, unemployment in the District was at its highest rate in six years and 5,000 people in the construction industry had recently lost their jobs. The venture began as the Executive Director posed the idea to the organizations Board of Directors to find ways to sustain its programs without total reliance on government funding while still creating opportunities for the clients it serves. In the planning stages he looked at the number of construction workers who would be in need of new skills and short-term training to obtain those skills and the fact that there were hundreds of people out of work who needed training. The organization was committed to thinking outside the box to lessen employment gaps among the clientele it serves. After Mr. Jones spent countless hours researching proven models and persuading his board to “buy-in” to the idea of a home improvement social enterprise which would employ some of the students of the Weatherization Center, the agency immediately went to work to put together a strategy to interest homeowners in improving their homes and lessening the city’s carbon footprint. GCHI provides the following home improvement, home energy-efficiency and eco-friendly services:
Painting – using paint with low or no volatile organic compounds (VOC)

Insulation – using cellulosic insulation, which is plant fiber which can be made up of newspaper, cardboard, cotton, straw, sawdust, hemp and corncob. The process also uses environmentally safe polyurethane foam.

Air Sealing – using state-of-the art technology to detect air leaks

Weatherization – installing energy measures that significantly conserve energy usage and using Energy Star rated replacements.

Window Replacements – using Energy Star rated products made in America

General Home Improvements – using recycled wood and reusable products where possible.

Home Energy Auditing – using cutting edge equipment with the goal of detect 100% of energy leakage.

Sensitive to the harmful gas emissions emitted by automobiles, staff consolidates transportation use by transporting their GCHI staff in the least amount of vehicles and making fewer trips to the job sites. Vehicles are American made and receive low gas millage.

To further its mission to impact the community GCHI provides sub-contract opportunities for approved small business owners through the District of Columbia’s Local Small Disadvantaged Business Enterprise to work on home improvements that require work beyond the scope of the organization. Goodwill, the Easter Seals and the Veterans Association all have benefited from the contract relationship with UPO, where they each cover the fees for participants from their Workforce Development Program to complete the training.

Green Capital Home Improvement has become well known for the quality training it provides and has seen an increase in requests for contract services. It recently signed a contract with the DC Sustainable Energy Utility to provide training for District residents and business owners in the various green training disciplines if offers. Using donations from the city’s electric utility, Potomac Electric Power Company, the DC Sustainable Energy Utility works with low-income qualified residents to provide low cost energy retrofits. It also has a contract with the District’s Department of Energy to provide energy audits and retrofits for homeowners at all income levels. Green Capital Home Improvement currently has five employees that complete energy audits and install energy efficient measures. However, due to its need for expansion, GCHI is in the hiring process to employ another six new technicians to satisfy the new demand for the audits and energy installations that are being referred to the agency by the city’s department of energy.

Though GCHI is a for profit business, which does not have customer eligibility requirements, it continues to serve low-income people through various contracts, such as Carbonfree DC. Carbon Free DC is a nonprofit organization that initiated a “green” home awareness and upgrade program, through its Extreme Green Neighborhood Makeover. UPO’s Green Capital Home Improvement social enterprise has a contract with Carbonfree DC to provide the energy audits to assess the energy upgrades needed to homes occupied by 20 low-income families in the District of Columbia.

CHALLENGES

“The one thing that is sometimes hard for people to understand,” said Wayne Hodges, Program Manager for UPO’s Green Technology Division, “is that though we are a nonprofit, Green Capital Home Improvement is a for-profit business.” When GCHI started contracting with the District of Columbia’s Office of Environment
GCHI it went through the same competitive bidding process along with other competing businesses went through. “We are not granted the money to operate Green Capital”, said Wayne Thompson, Director of the Green Technology Division. Though the business is run by the same people who fulfill the organization’s charitable mission, it is important to keep sight of the goal to remain profitable. Otherwise, it becomes a liability, therefore hindering the organization from continuing to serve the more than 66,267 people they provide human and economic development services and support to each year.

Hiring staff who understand the concept of a social enterprise is important to avoid unproductivity of the internal and external operations. “When we first introduced this enterprise to the board and received their endorsement, we hired a program manager that did not have an entrepreneur background or mind-set”, Mr. Jones said. He advises that agencies seeking to replicate this process hire someone who has an entrepreneurial mindset and field experience.

Green Capital is a social enterprise that meets the goal of to expand opportunities for economically disadvantaged business owners. “UPO We have to get out there and hustle for new business, just like any other business in the home improvement out there”, said Wayne Hodges, the Division Director.

Both the Green Capital Weatherization Center and Green Capital Home Improvement have produced results that stretch beyond the business operations. The program impacts are:

- Ninety-five percent of the trained students who obtained contracts with the sub-contractors used by GCHI are still working for the contractors.
- Since 2009 over 1,053 homes have been retrofitted with energy efficient measures.
- Sixty-four ex-offenders were referred to and obtain contract positions with contractors.
- The agency provides sub-contracts to seven disadvantaged business who perform various plumbing, electrical and structural work on homes in the District.
- 50 students who have been trained at the WTC have become Building Performance Institute Certified. As of 2011 the WTC now requires that all participants become BPI certified prior to employment with the organization.
- Two are on target to receive their Leadership in Energy and Environmental Design (LEED) certification.
- Over the next five years participating homeowners will realize a 20% savings in their energy cost.
APPENDIX

BIOGRAPHIES

Dana Maurice Jones, Executive Director

Dana Maurice Jones is the seventh person to head the United Planning Organization (UPO), the designated community action agency that is now in its 48th year of service to residents of our Nation's Capital, Washington, DC. Mr. Jones, who joined UPO in 2004 as a crisis manager, was subsequently named permanent Chief Executive Officer a year later and immediately began the process of fostering in a new direction for the venerable District of Columbia organization. A native of southern Maryland, Dana Jones has dedicated his adult life to bringing quality services to neighborhoods and citizens. He has served as President/CEO of the Southern Maryland Tri-County Community Action Committee located in Hughesville, an organization often consulted by similar organizations nationwide for guidance in quality management. Prior to his service to Southern Maryland, Mr. Jones was special assistant to the executive director for Shore Up, Inc., a community action group located in Salisbury, Maryland. Mr. Jones, a graduate of the University of Maryland, Eastern Shore, has furthered his studies in graduate work at both Salisbury State and Bowie State Universities. He is currently pursuing additional graduate studies at Howard University.

Wayne Thompson, Director of Property Management

Wayne Thompson provides management and oversight if the agency's Office of Property Management. His role is to provide facilities management for the 25 properties the agency owns and manage the Green Technology Center staff. Mr. Thompson has been with the agency since 1983. He received a Bachelor of Arts Degree in Industrial Education for Elizabeth City State University.

Wayne Hodges, Director of Technology Division

Wayne Hodges has 30 years of experience in the housing and weatherization field. His responsibilities as Director of Technology include managing the staff, oversight of the operations of the Green Capital Home Improvement Center, new business acquisition, program marketing and managing the current contracts of the division. Hodges has a Bachelor of Arts degree in Business Administration from University of Virginia. Wayne served as the president of the National Association of Housing Counselors.

EQUIPMENT SUPPLIERS

Lowes
Home Depot
Sun Electrical

Green Capital Home Improvement Average Revenue Generated from 10/09 thru 9/11:
$2.3 million

Independent Weatherization Services (same period)

$78,000

FORMS

• Program Flyer
• Low-Income Multifamily Direct Installation Form
• WTC Registration Form
• Inspection Report
• Work Order
• Quality Control Form
- Job Completion Contract
- Home Improvement Contract

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