

2Gen Economy Implementation Toolkit

TIER 2: TACTICAL TOOLS FOR PROGRAM OPERATORS

Six field-tested tools for program directors, HR teams, and case managers ready to move from compliance theater to household stability.

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"Change the metrics. Change the outcomes."

What's Inside This Toolkit

Tool 1: ATS Audit Checklist

Identify and eliminate hiring biases in your applicant tracking system

Tool 2: Skills-First Interview Scorecard

Hire based on demonstrated ability, not résumés or records

Tool 3: 90-Day Retention Script

Structured check-ins that improve onboarding and reduce turnover

Tool 4: Household Stability Scorecard

Monitor the metrics that actually predict long-term success

Tool 5: 2Gen Funding Policy Template

Legislative language for performance standards and budget justification

Tool 6: Pre-Placement Agreement Template

Define employer-partner responsibilities for high-demand roles

Each tool is designed to be immediately actionable. No theory without implementation. No metrics without accountability. Every tool includes instructions, examples, and KPIs.

Tool 1: ATS Audit Checklist

Purpose: Identify hiring biases embedded in your Applicant Tracking System, replace degree requirements with skills-gates, and track KPIs that measure actual workforce outcomes.

Who uses this: HR Directors, Talent Acquisition Managers, Workforce Program Operators

Section A: Screening Filter Audit

- Review all automated screening filters for degree requirements — flag any that can be replaced with skills demonstrations
- Identify criminal history questions that appear before conditional offer stage (Ban-the-Box compliance)
- Audit keyword filters that may exclude qualified candidates (e.g., employment gap penalties)
- Review minimum experience thresholds — are they evidence-based or arbitrary?
- Check for zip code or address-based filtering that may create geographic bias
- Document all auto-rejection rules and their rationale

Section B: Skills-Gate Replacement

- For each degree requirement removed, define a skills demonstration alternative
- Create standardized skills assessments for top 5 high-volume roles
- Establish minimum competency thresholds based on job task analysis
- Build portfolio/work-sample submission options into application flow
- Train hiring managers on evaluating skills demonstrations vs. credentials

Section C: KPI Tracking

KPI	Baseline	Target	Timeline
Fair-chance applicant pass-through rate	____%	____%	90 days
Skills-gate conversion rate	____%	____%	90 days
Time-to-hire (fair-chance vs. standard)	____ days	____ days	90 days
90-day retention (fair-chance hires)	____%	85%+	180 days
Performance parity score	____%	85%+	180 days

Tool 2: Skills-First Interview Scorecard

Purpose: Standardize hiring decisions around demonstrated ability rather than résumé credentials, employment history gaps, or criminal records. Ensure every candidate is evaluated on the same competencies.

Instructions

1. Identify 4–6 core competencies required for the role (from job task analysis, not job description).
2. Rate each candidate 1–5 on each competency during the interview.
3. Use behavioral questions tied to each competency — not hypotheticals.
4. Document evidence for each rating.
5. Compare total scores across candidates. Hire the highest scorer.

Sample Scorecard

Competency	Question Prompt	1	2	3	4	5	Evidence
Problem Solving	"Describe a time you solved a problem with limited resources"	■	■	■	■	■	
Communication	"Give an example of explaining something complex to a team"	■	■	■	■	■	
Reliability	"Describe how you managed competing deadlines"	■	■	■	■	■	
Technical Skill	"Walk me through [specific task relevant to role]"	■	■	■	■	■	
Adaptability	"Tell me about a time you had to learn something quickly"	■	■	■	■	■	

Scoring Guide: 1 = No evidence | 2 = Limited evidence | 3 = Adequate | 4 = Strong | 5 = Exceptional

Decision Rule: Minimum total score of 15/25 to advance. Document all decisions.

Tool 3: 90-Day Retention Script

Purpose: Structured check-in framework for the critical first 90 days of employment. Research shows that 85% of fair-chance hires who make it past 90 days achieve performance parity with standard hires (SHRM, 2021). This script keeps them on track.

Week 1 Check-In (Day 3–5)

Focus: Orientation, logistics, immediate barriers

Script:

"How are you settling in? I want to make sure you have everything you need to succeed here."

- Confirm transportation is reliable
- Verify schedule works with childcare/family obligations
- Ensure all onboarding paperwork is complete
- Introduce to team mentor/buddy
- Confirm understanding of first-week expectations
- Ask: 'What's one thing that would make your first week easier?'

Week 2 Check-In (Day 10–12)

Focus: Early performance, social integration, emerging barriers

Script:

"Let's talk about how things are going. What's working well? What's been challenging?"

- Review initial performance feedback
- Check social integration with team
- Identify any emerging barriers (housing, transportation, childcare)
- Connect to support resources if needed
- Reinforce positive behaviors observed
- Set clear expectations for weeks 3–4

Day 30 Check-In

Focus: Performance trajectory, household stability, goal-setting

Script:

"You've been here a month. Let's look at where you are and where you're headed."

- Formal performance review against role expectations
- Household stability check (housing secure? income sufficient? childcare stable?)
- Set 60-day performance goals

- Discuss career pathway opportunities
- Document any support services utilized
- Ask: 'What would help you perform even better in the next 30 days?'

Day 60 Check-In

Focus: Skill development, advancement readiness, retention risk assessment

Script:

"Two months in. Let's talk about your growth and what comes next."

- Review progress against 60-day goals
- Assess skill development trajectory
- Identify advancement opportunities
- Re-check household stability indicators
- Address any retention risk factors
- Set 90-day milestone targets

Day 90 Check-In (Critical Milestone)

Focus: Performance parity assessment, long-term retention plan, success documentation

Script:

"Congratulations on reaching 90 days. Let's document your success and plan your future here."

- Formal performance parity assessment (compare to standard hire benchmarks)
- Document all achievements and growth areas
- Create 6-month development plan
- Confirm household stability metrics
- Celebrate milestone — recognition matters
- Transition from intensive support to standard management
- Report outcomes to program for data tracking

Tool 4: Household Stability Scorecard

Purpose: The household is the unit of change. This scorecard monitors the metrics that actually predict long-term economic mobility — not just job placement, but the stability infrastructure that makes employment sustainable.

"If you measure placement counts, you optimize for placement counts. If you measure household stability, you optimize for economic freedom."

Monthly Assessment

Domain	Indicator	Status (1-5)	Notes / Action Needed
Housing	Stable housing secured		
Housing	Housing cost < 30% of income		
Income	Primary earner employed		
Income	Partner/co-parent employed		
Income	Combined income above poverty line		
Childcare	Reliable childcare in place		
Childcare	Child school attendance > 90%		
Transportation	Reliable transportation		
Health	Health insurance coverage		
Health	Mental health support (if needed)		
Financial	Bank account active		
Financial	Emergency savings started		
Legal	No new legal issues		
Legal	Reentry conditions met		

Scoring: 1 = Crisis | 2 = At Risk | 3 = Stabilizing | 4 = Stable | 5 = Thriving

Action Threshold: Any domain scoring 1–2 triggers immediate intervention plan.

Reporting: Aggregate scores monthly. Track trajectory over 6–12 months.

Tool 5: 2Gen Funding Policy Template

Purpose: Ready-to-adapt legislative and policy language for jurisdictions, agencies, and organizations seeking to align funding with 2Gen Economy outcomes. Includes performance standards, budget justification frameworks, and accountability measures.

Section 1: Purpose and Findings

[Jurisdiction/Organization Name] finds that:

- (a) Current workforce development funding prioritizes individual job placement metrics over household economic stability, resulting in high recidivism in poverty and program cycling.
- (b) Research demonstrates that two-generation (2Gen) approaches — which simultaneously address the needs of parents/caregivers and children — produce superior long-term economic outcomes.
- (c) Fair-chance employment practices, when combined with household stability supports, achieve 85% performance parity with standard hires and 13% lower turnover (SHRM, 2021).
- (d) The estimated suppressed GDP from systemic exclusion of 70 million adults with records ranges from \$78–87 billion annually.

Section 2: Performance Standards

All funded programs shall report on the following outcome metrics:

Primary Metrics (Required):

1. Household income trajectory (not just individual wage at placement)
2. Housing stability at 6 and 12 months post-program
3. Childcare access and child school attendance rates
4. 90-day and 180-day employment retention rates
5. Performance parity scores (fair-chance vs. standard hires)

Secondary Metrics (Recommended):

6. Partner/co-parent employment status
7. Financial asset building (savings, credit score improvement)
8. Recidivism rates at 12 and 24 months
9. Healthcare access and utilization
10. Participant satisfaction and self-reported well-being

Section 3: Budget Justification Framework

Funding requests shall include:

(a) **Cost-per-household-stabilized** (not cost-per-placement)

(b) **ROI projection** using the following formula:

ROI = (Reduced recidivism costs + Increased tax revenue + Reduced public assistance) / Program cost

(c) **Comparison baseline** against traditional placement-only programs

(d) **Timeline to breakeven** (typically 18–36 months for 2Gen programs)

(e) **Sustainability plan** beyond initial funding period

Section 4: Accountability and Reporting

- (a) Quarterly reporting on all primary metrics.
- (b) Annual independent evaluation of program outcomes.
- (c) Public dashboard showing real-time progress against targets.
- (d) Corrective action plan required if primary metrics fall below targets for two consecutive quarters.
- (e) Funding continuation contingent on demonstrated household stability improvements.

Section 5: Implementation Timeline

Phase	Timeline	Key Actions
Phase 1: Assessment	0–90 days	Audit current metrics, identify gaps, establish baseline data
Phase 2: Redesign	90–180 days	Implement new metrics, train staff, update reporting systems
Phase 3: Launch	180–365 days	Full program operation, monthly reporting, quarterly reviews
Phase 4: Evaluate	12–18 months	Independent evaluation, ROI assessment, policy refinement

Tool 6: Pre-Placement Agreement Template

Purpose: Define clear responsibilities between workforce programs and employer partners before placement begins. Ensures both parties are accountable for outcomes — not just the candidate.

Agreement Between:

Workforce Program: _____

Employer Partner: _____

Effective Date: _____

Target Role(s): _____

Employer Commitments

- Adopt skills-first hiring criteria for designated roles
- Remove criminal history questions from initial application (Ban-the-Box)
- Provide structured onboarding (minimum 2-week orientation)
- Assign workplace mentor for first 90 days
- Participate in 90-day retention check-in process
- Report performance and retention data quarterly
- Offer competitive wages (minimum: living wage for local area)
- Provide benefits access (healthcare, PTO) within 90 days
- Commit to fair performance evaluation (same standards as all employees)

Program Commitments

- Pre-screen candidates for role-specific skills readiness
- Provide employer with candidate skills assessment results
- Maintain case management support for first 90 days
- Coordinate household stability services (housing, childcare, transportation)
- Respond to employer concerns within 48 hours
- Provide replacement candidate within 30 days if placement fails
- Share aggregate outcome data quarterly
- Facilitate ongoing professional development opportunities

Success Metrics

Both parties agree to track and report:

- 90-day retention rate target: ____%
- Performance parity target: ____%
- Household stability score target: ____/5
- Advancement/promotion rate target: ____%

Review Schedule: Quarterly meetings to assess progress and adjust as needed.

Signatures:

Program Representative: _____ Date: _____

Employer Representative: _____ Date: _____

Ready to Implement?

These tools work best when they're part of a system — not isolated interventions.

Your Next Steps:

- 1. Audit your current metrics.** What are you actually measuring? Placements or stability?
- 2. Pick one tool.** Start with the ATS Audit or Household Stability Scorecard. Implement it this quarter.
- 3. Measure the difference.** Track outcomes for 90 days. Compare to your baseline.
- 4. Scale what works.** Use the Funding Policy Template to secure resources for full implementation.

Need help implementing? Let's talk.

Schedule a Consultation: khalilosirisconsulting.com/contact

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Learn More: khalilosirisconsulting.com/2gen-economy-framework