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SERVICES' AND ASSESSOR'S REPORT DATED MARCH 3, 2021](#)



November 16, 2020

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TO: Supervisor Kathryn Barger, Chair  
Supervisor Hilda L. Solis  
Supervisor Mark Ridley-Thomas  
Supervisor Sheila Kuehl  
Supervisor Janice Hahn

FROM: Otto Solórzano, Acting Director  
Jeffrey Prang, Assessor

SUBJECT: **ESTABLISHING FORMAL PILOT TRAINING PROGRAMS FOR OFFICE OF THE ASSESSOR AT RIO HONDO AND EAST LOS ANGELES COLLEGES (ITEM NO. 75-I, AGENDA OF AUGUST 4, 2020)**

On August 4, 2020, the Board of Supervisors (Board) adopted a motion authored by Supervisor Hilda L. Solis, amended by Chair Kathryn Barger directing the Department of Workforce Development, Aging, and Community Services (WDACS), in collaboration with the Office of the Assessor, and the Chief Executive Officer (CEO), to develop and report-back with a plan to establish an Assessor pilot training program at Rio Hondo and East Los Angeles Colleges. The plan, at a minimum, was to include:

- A strategy to establish a formal pilot training program at Rio Hondo and East Los Angeles Colleges to enhance students' competitiveness in securing real estate and appraisal employment opportunities and successful careers in the Assessor's Office and other County of Los Angeles (County) departments;
- A timeline to implement the training programs and options to expand Countywide for interested community colleges;
- A funding plan inclusive of the anticipated program costs and potential funding sources; and a review of selection criteria to ensure future job opportunities reflect consideration for those completing the training programs who are more job ready for careers with the Assessor and/or other County Departments.

## **BACKGROUND**

The County issued a “Hard-Hiring Freeze” Order on March 31, 2020, in response to the COVID-19 state of emergency. As a result, the Assessor immediately halted the hiring of new appraisers. The Assessor determines the assessed value of property in the county and certifies those values to the county auditor for the preparation of property tax statements. The new appraisers were intended to replace staffing lost due to attrition over the last two years. In addition, the Assessor planned to hire more appraisers and support staff, whether Proposition 15, the Tax on Commercial and Industrial Properties for Education and Local Government Funding Initiative on the November 3, 2020 general election ballot passed or not. The evaluation of Proposition 15’s potential adoption revealed creative recruitment and hiring strategies that would be beneficial to the Assessor. The Assessor determined that items, such as Ownership Clerks and Appraiser Assistants, would provide the most expansive recruitment opportunity for an entry level and middle skilled workforce.

Due to the narrow defeat of Proposition 15, the need to substantially increase appraisers, Ownership Clerks and Appraiser Assistants remains immediate, if not urgent. The Assessor continues to require continuous recruitment in these positions.

Although the Assessor provides a formal recruitment and training program for new appraisers, it lacks a training program for Appraiser Assistants, and only provides foundational training for Ownership Clerks. Community colleges, such as Rio Hondo and East Los Angeles, offer credit and noncredit courses in the areas of Accounting, Real Estate Principles, Real Estate Practice, Real Estate Finance, and Real Estate Appraisal. The Assessor and the colleges can expand upon these current offerings to meet the needs of the Office of the Assessor.

## **PROGRESS TO DATE**

In exploring the feasibility of the motion, WDACS convened a meeting with the Assessor, Rio Hondo College, East Los Angeles College (collectively, “colleges”), Department of Human Resources (DHR), County Counsel, and the Office of Supervisor Solis to discuss in detail the needs of the Assessor, the development of the training, and the recruitment and hiring processes. WDACS convened a subsequent meeting on October 8, 2020, where the Assessor identified that development of the training would be needed to address the hiring needs for both the Ownership Clerk I and the Appraiser Assistant items. Two workgroups were created to 1) assess current college offerings and develop additional training to meet Assessor’s needs, and 2) develop a streamlined pathway for training participants (students) into permanent County employment at the Office of the Assessor.

## **1. The Assessor and Colleges Training Workgroup**

The Assessor and Colleges Training Workgroup is comprised of the Assessor, Rio Hondo College, East Los Angeles College, and WDACS. The workgroup met on October 20, 2020 and discussed current course offerings that may align with annual Assessor training needs. The Assessor discussed the possible need to recruit and train up to 100 candidates for the Ownership Clerk and Appraiser Assistant items should Proposition 15 pass in the current election. Although the defeat of Proposition 15 on the November 3, 2020 ballot altered the Assessor's anticipated staffing needs, the Assessor continues to require continuous recruitment of the Ownership Clerk and Appraiser Assistant items.

The Workgroup determined training for Ownership Clerk I and Appraiser Assistant is a priority. Both positions require a minimum of 60 college units, and the Appraiser Assistant (Personal Property) requires a set aside of 6 units in Accounting. Both colleges are reviewing pertinent job specifications, training material, and the Board of Equalization Assessor Handbook which is used statewide, to assess current course offerings and the need to develop any additional curriculum material. The colleges anticipate completing their review in November and will provide a proposed training curriculum once the review has been completed.

## **2. Assessor and Human Resources Recruitment Workgroup**

The Assessor and Human Resources Recruitment Workgroup is comprised of the Assessor, DHR, County Counsel, and WDACS. The workgroup met on October 21, 2020 and discussed current and anticipated staffing needs, and the training program's pathway into permanent County employment. At the meeting, the Workgroup determined that those placed into the Appraiser Assistant item have the opportunity to promote to an Appraiser Trainee item after two years on the job experience, so long as they can pass the Appraiser exam.

DHR and the Assessor discussed the need to open a continuous exam for both positions to create an ongoing, readily accessible pipeline of candidates to address current attrition and operational needs. DHR is exploring the possibility of a specialized exam for those students completing cohorts at either Rio Hondo College or East Los Angeles Community College.

## **NEXT STEPS**

The workgroups will develop a training and recruitment plan by early 2021, with the possibility to expand the program to other community colleges throughout the County. Demand for the training program was to be driven by whether Proposition 15 passed. Although Proposition 15 did not pass, the Assessor continues to have personnel resource needs. The workgroups will return to the Board with a proposed curriculum, timeline for full implementation, proposed human resources process for County positions, and proposed funding source.

## CONCLUSION

We will continue to move forward with program development and implementation, and we will provide a detailed implementation plan to the Board on or before February 1, 2021. Should you have any questions, please contact us directly, or your staff may contact Kevin Anderson, Special Assistant, at [kanderson@wdacs.lacounty.gov](mailto:kanderson@wdacs.lacounty.gov).

OS:JRP:CMT  
IV:RN:katc

c: Executive Office, Board of Supervisors  
Chief Executive Officer  
County Counsel  
Human Resources



March 3, 2021

**BOARD OF SUPERVISORS**

Hilda L. Solis  
Holly J. Mitchell  
Sheila Kuehl  
Janice Hahn  
Kathryn Barger

TO: Supervisor Hilda L. Solis, Chair  
Supervisor Holly J. Mitchell  
Supervisor Sheila Kuehl  
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Supervisor Kathryn Barger

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*Human Relations*

FROM: Otto Solórzano, Acting Director  
Jeffrey Prang, Assessor

SUBJECT: **CREATING EDUCATIONAL OPPORTUNITIES AND CAREER PATHWAYS WITH LOCAL COMMUNITY COLLEGES (ITEM NO. 75-I, AGENDA OF AUGUST 4, 2020)**

**CONTACT INFORMATION**

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This report provides a progress update on the development of a career pathway program for the Office of the Assessor (Assessor). The Assessor has partnered with Workforce Development, Aging and Community Services, Rio Hondo College (RHC), East Los Angeles College, Mount San Antonio College, the Department of Human Resources (DHR), County Counsel, the Chief Executive Office (CEO), and the Office of Supervisor Solis to develop and implement a plan to fill entry-level Appraiser Assistant vacancies. The Assessor has identified Appraiser Assistant as the classification with the greatest workforce efficacy for which training is needed and offers a career ladder and growth opportunity. The proposed implementation plan (attached) includes:

- A funding plan as part of the Assessor's Fiscal Year 2021-22 Recommended Budget submission to the CEO;
- Development of a customized curriculum to be approved by the California Community Colleges Chancellor's Office;
- Establishment of an outreach and recruitment plan;
- A timeline to develop, approve, and implement the training program with the start of the first cohort in Fall 2021 at RHC;
- Expansion to other colleges will be evaluated as the need for additional Appraiser Assistant items increases;
- Development of selection criteria that aligns with the training curriculum and program certificate; and



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- Alignment between completion of the first training cohort, vacancies needed by the Assessor, and initiation of the exam process by DHR.

Thank you for the opportunity to expand opportunities for workers through partnering with the Office of the Assessor and local community colleges. We look forward to apprising you of our progress as we implement the Assessor Career Pathway Program.

Should you have any questions, please contact us directly, or your staff may contact Kevin Anderson, Special Assistant, at [kanderson@wdacs.lacounty.gov](mailto:kanderson@wdacs.lacounty.gov).

OS:JRP:CMT  
JRC:SDP:katc

Attachment

c: Executive Office, Board of Supervisors  
Chief Executive Office  
Assessor  
Department of Human Resources

## ***CREATING EDUCATIONAL OPPORTUNITIES AND CAREER PATHWAYS WITH LOCAL COMMUNITY COLLEGES***

### **BACKGROUND**

On August 4, 2020, the Los Angeles County (County) Board of Supervisors adopted a motion authored by Supervisor Hilda L. Solis, amended by Chair Kathryn Barger, directing Workforce Development, Aging and Community Services (WDACS), in collaboration with the Office of the Assessor (Assessor), Department of Human Resources (DHR), and Chief Executive Office (CEO), to develop and report-back with a feasibility analysis and plan to establish an Assessor pilot training program at Rio Hondo College (RHC) and East Los Angeles College (ELAC). The plan, at a minimum, is to include:

- A strategy to establish a formal pilot training program at RHC and ELAC to enhance students' competitiveness in securing real estate and appraisal employment opportunities and successful careers in the Assessor's Office and other County departments;
- A timeline to implement the training programs and options to expand countywide for additional interested community colleges;
- A funding plan inclusive of the anticipated program costs and potential funding sources; and
- A review of selection criteria to ensure that future job opportunities reflect consideration for those completing the training programs who are job ready for careers with the Assessor and/or other County departments.

WDACS convened workgroups with the Assessor, RHC, ELAC and Mount San Antonio College (Mt. SAC) (collectively, "colleges"), DHR, County Counsel, the CEO, and the Office of Supervisor Solis to develop the Assessor Career Pathway Program. The workgroups identified the workforce needs of the Assessor, the appropriate curriculum, and agreed on a recruitment and hiring process for those who complete requisite coursework and successfully attain the course certificate. Below we provide details on the progress made so far on each of these critical steps.

### **ASSESSOR CAREER PATHWAY PROGRAM**

The Assessor has determined there is a significant need to recruit Appraiser Assistant positions to replace staffing lost due to attrition, promotions, and retirements. In addition, there is an increased need for Appraiser Assistants due to the adoption of Proposition 19 – The Home Protection for Seniors, Severely Disabled, Families, and Victims of Wildfire or Natural Disasters Act<sup>1</sup> - on November 3, 2020. The entry-level Appraiser Assistant

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<sup>1</sup> The Home Protection for Seniors, Severely Disabled, Families, and Victims of Wildfire or Natural Disasters Act allows property tax base year value transfers for replacement properties without regard to the replacement property's location or value; limits or repeals the parent-child, grandparent-grandchild exclusion from change in ownership.



position offers significant utility in terms of subject matter and departmental placement versatility, as well as clear career pathway and promotional opportunities. Accordingly, this report outlines a plan to fill entry-level Appraiser Assistant vacancies as an entry point to career pathways with the Assessor.

### **Appraiser Assistant Career Ladder**

Although the Assessor provides a formal recruitment and training program for new Appraisers, it lacks a formal training program for Appraiser Assistants. The Assessor seeks to reduce the time required to train Appraiser Assistants, once hired, by working to establish a college-to-career pathway, whereby qualified candidates will have received training on job-essential assessment topics, prior to hiring, thereby expediting the introduction of Appraiser Assistants into the process of performing their job functions. Individuals employed as Appraiser Assistants are expected to perform, among other functions, the following:

- Explain assessment policies and procedures to property owners;
- Examine and process legal documents;
- Collect information to be used to evaluate real and personal property appraisals;
- Review construction statements;
- Perform field canvasses to identify/locate taxable personal property;
- Perform simple on-site inspections to gather information; and
- Verify subject property and comparable property data on Assessment Appeal cases.

Individuals employed as Appraiser Assistants can gain experience in one or more of the following Assessor sub-departments:

- Roll Services (Ownership and Business Solutions Group Divisions);
- District Appraisals;
- Major Appraisals (Real Property and Personal Property Sections); and
- Assessment and Public Services (Exemptions Division and Legal Services Section).

The Appraiser Assistant position does not require State Board of Equalization (BOE) certification<sup>2</sup> and provides an avenue to the Appraiser position. Through this program, the Assessor intends to develop a pool of qualified, job-ready candidates who have received

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<sup>2</sup> The California State Board of Equalization (BOE) is responsible for the certification of county assessors' personnel and BOE personnel who perform appraisals for property tax purposes. The BOE administers a certification examination to qualified individuals who are currently employed in one of the 58 county assessors' offices or the Board. To assist individuals in preparation for the examination, there are two alternative online sessions available. Both courses introduce new real property appraisers and auditor-appraisers to the fundamentals of appraising for property tax purposes. They present the various appraisal approaches and significant appraisal principles for all types of property. The courses cover the economic aspects and legal definitions of market value and California property tax laws (<https://www.boe.ca.gov/proptaxes/boetc.htm>).

training on property assessment topics and are prepared to compete for vacant Appraiser positions. Appraiser Assistants may apply to participate in the Assessor's one-year Appraiser Trainee Certification Program (ATCP), the only BOE-approved ATCP among California assessors. However, a challenge in developing a clear pathway for Appraiser Assistants, is that ATCP candidates must pass an exam to qualify for the training program. Historically, this makes internal recruitment of Appraiser Assistants to Appraisers difficult. Ideally, Appraiser Assistants who have completed this certification program will be more prepared to pass the exam, thus increasing the potential pool of ATCP candidates. Upon successful completion of the ATCP and passing of the comprehensive final certification examination, Appraiser Trainees would become eligible to become certified real property and personal property tax appraisers. Thus, through this pilot program, the Assessor will identify solutions that help Appraiser Assistants receive the appropriate training and support to prepare and pass the required examination to become Appraisers.

The Assessor anticipates Appraiser vacancies to be approximately 20-25 per year. Appraisers may subsequently seek promotion to the following positions within the Appraisal series: Appraiser Specialist, Supervising Appraiser, Principal Appraiser, and Chief Appraiser. Conversely, Appraiser Assistants who meet eligibility requirements may also subsequently seek promotion to the following positions within the Assessment series: Assistant Property Assessment Specialist, Property Assessment Specialist, Senior Property Assessment Specialist, and Principal Property Assessment Specialist.

### **Appraiser Assistant Training Curriculum**

RHC, in collaboration with the Assessor, is developing a noncredit certificate of completion called "California Property Taxation and Appraisal." The certificate will consist of four courses (Table I), two of which are already offered at RHC and two new courses, which are currently being developed. In addition to the successful completion of the four courses in the certificate program, candidates are required to have 60 college credits to be eligible to take the civil service exam for the Appraiser Assistant position when a job bulletin is posted.

Developed courses are designed to offer flexibility to students to not only seek employment opportunities with Los Angeles County's Assessor, but also with other counties and private real estate businesses, such as real estate assessment law firms. The courses will incorporate material from the BOE Assessors' Handbook, Assessor-specific job functions, and job-readiness skills.

**Table I. Course Descriptions**

<b>Course Name</b>	<b>Description</b>
<b>Real Estate Principles (48 hours)</b>	This existing course covers the basic laws and principles of land and property transactions. Course topics include an overview of property laws, land descriptions, titles, acquisitions and transfers, liens and encumbrances, taxation, contract law, landlord and tenant laws, and real estate mathematics and finance.

<b>Real Estate Appraisal (48 hours)</b>	This existing course provides a comprehensive overview of real estate appraisal principles and procedures. Course topics include land values and their characteristics, the process of appraising, capitalization theory, site analysis, and construction methods.
<b>California Property Taxation &amp; Assessment (24 hours)</b>	This new course is being developed to include such topics as: individual forms of ownership, trusts and legal entities, change in ownership exclusions, base year value transfers, rescissions, basic appraisal for property taxation, appraisal of new construction, exemptions, and the assessment appeals board.
<b>Career Preparation: 21st Century Skills (12 hours)</b>	This new course is being developed to orient students to essential capacities for professional and collegial workplace performance such as: critical thinking, collaboration, communication, and cultural humility. Students will also gain practical guidance in resume composition and job interview preparation.

### **Appraiser Assistant Recruitment Process**

Recruitment of prospective students into the California Property Taxation and Appraisal noncredit certification program will take a multi-phase approach. The recruitment plan will begin with Phase 1, and progress into the subsequent phases until cohort size needs are met.

**Phase 1** - Outreach to RHC students and alumni who have at least 60 college credits, which include the two existing noncredit real estate courses, Real Estate Principles and Real Estate Appraisal. Students enrolled in the cohort will be referred to an America's Job Center of California (AJCC) for co-enrollment to cover the cost of any supportive services needed by participants, including transportation, childcare, and other barrier removal to be successful in the program.

**Phase 2** - Outreach to RHC students and alumni with at least 60 college credits and invite them to enroll in the new noncredit program, which includes the two existing noncredit real estate courses and the two newly developed courses, California Property Taxation & Assessment and Career Preparation 21st Century Skills. Students enrolled in the cohort will be referred to an AJCC for co-enrollment to cover the cost of any supportive services needed by participants, including transportation, childcare, and other barrier removal to be successful in the program.

**Phase 3** – Work with WDACS to leverage their public workforce system's AJCCs. AJCC clients are individuals from each of the job centers' respective local community who are seeking career pathway opportunities. WDACS will work together with the colleges and the AJCCs to identify current clients who have completed at least 60 college credits and

invite them to enroll in the new noncredit program, which includes the two existing noncredit real estate courses and the two newly developed courses.

**Phase 4** – As needed, identify additional community college partners to scale up class size and add modules to the required curriculum to meet the hiring requirements of the Assessor.

## **Examination Process**

The County requires that competitive examinations be conducted to fill vacant positions. The examinations previously conducted for the Appraiser Assistant position have relied on outdated information about this job. The Assessor is partnering with DHR to conduct an up-to-date job analysis, which will form the basis of an examination plan that can be implemented to select job candidates into the newly created positions.

DHR will conduct a job analysis of the Appraiser Assistant position and will work with the Assessor's Office to generate task statements, and identify knowledge areas, skills, abilities, and other attributes (KSAOs) required to perform this job. This data is quantified, such that weights can be attached to each KSAO, thereby providing a formal basis for an exam plan.

Historically, the examination for the Appraiser Assistant classification has included a detailed knowledge test. However, DHR expects that the training programs and curriculum provided by the colleges affiliated with this new effort will provide job candidates with sufficient knowledge of the necessary content so that a knowledge test is not required. The test that was previously used will be replaced by the training provided by the colleges. Instead, the new iteration of the exam will focus on other competencies required to perform the job, including customer orientation, oral and written communications skills, basic data analysis skills, and other soft skills.

In general, the County's entry-level examinations that are open to the public typically result in hundreds or thousands of applications. To ensure a targeted applicant pool for this position, the job announcement will specify that the examination will require applicants to provide proof of enrollment in or completion of the college training program.

DHR and the Assessor intend to begin work on the job analysis immediately, with work on the resulting exam plan expected to begin in this spring. The goal is to prepare specific parts of the exam by early summer, well in advance of expected administration in the late summer or early fall.

## **IMPLEMENTATION PLAN**

### **a. Timeline**

The targeted timeline to implement the Appraiser Assistant Training Program Pilot is:

- April 2021: Development of the two new courses and approval by the Rio Hondo Curriculum Committee.
- The Assessor will collaborate with RHC to have courses approved by Summer 2021, and available by Fall 2021.
- July 2021:
  - Courses and certificate approved by the California Community Colleges Chancellor's Office.
  - Program advertised to eligible student candidates based on the phases outlined above.
- August 2021: Open instructor pool and hire faculty.
- September 2021: Program offered to enrolled cohort.
- November 2021: Course exams administered and successfully trained candidates directed to Appraiser Assistant examination.
- Program cycle continues with enrolled second cohort by January 2022.

Expansion to other colleges will be evaluated after the pilot has been completed and depending on the continued need for Appraiser Assistants and available resources. Assessor, DHR, and WDACS will align the completion of first training cohort with vacancies as needed and the development of the exam by DHR.

Subsequent cohorts are dependent on the Assessor's workforce need. The colleges are prepared and committed to implement the training program as needed.

#### **b. Funding**

Once approved by the California Community Colleges Chancellor's Office, the courses will be paid for by the State of California through community college funding. Students enrolled in the training courses will attend free of charge. WDACS will leverage Workforce Innovation and Opportunity Act (WIOA) funding to cover the cost of any supportive services needed by participants, including books, transportation, childcare, and other barrier removal to be successful in the program.

To maximize the success of participants and to ensure that Assessor's needs are met, we will explore the integration of the Assessor Career Pathway Program into the Countywide Youth Bridges Program (CYBP) and the Preparing Los Angeles for County Employment (PLACE) Program administered by the CEO. CYBP provides at-risk and disconnected youth with career pathways into County departments. The PLACE Program trains residents with barriers to employment for successful careers in County employment.

Funding for Appraiser Assistant positions, and the cost for DHR to administer the Appraiser Assistant examination, with no additional net County cost, is included in the Assessor's Fiscal Year 2021-22 Recommended Budget submission to the CEO.

**c. Selection**

The Assessor and DHR will work to solidify the exam selection requirements to align with the training curriculum and program certificate. The training will be conducted to satisfy the need to fill vacancies at the Assessor, as needed. DHR will initiate the examination process to align with the completion of the training cohort. DHR will also conduct an exam preparation workshop for students successfully completing the courses.

**FUTURE LABOR NEEDS AND COLLABORATION WITH COMMUNITY COLLEGES**

Beyond the scope of the pilot program presented here, the Assessor has broad professional staffing needs from Ownership technicians to Appraisers that local community colleges can support with educational opportunities that eventually lead to career pathways in the Assessor's Office.

Similar to the development of ATPC candidates, the Ownership technician requires one year of training and passing an exam to maintain employment. The success of this pilot program could reduce the Assessor's reliance on a limited number of experienced staff to train new technicians. Thus, students completing this certification program will create another pipeline for new hires, reducing the stress on internal recruitment, hiring and training capacity.

A robust community college training program that expands to include additional job classifications will ensure that new and qualified personnel can be hired without experiencing the intermittent challenges that County departments struggle to overcome.

**CONCLUSION**

Thank you for the opportunity to expand opportunities for workers through partnering with the Assessor and local community colleges. We look forward to apprising you of our progress as we implement the Assessor Career Pathway Program.