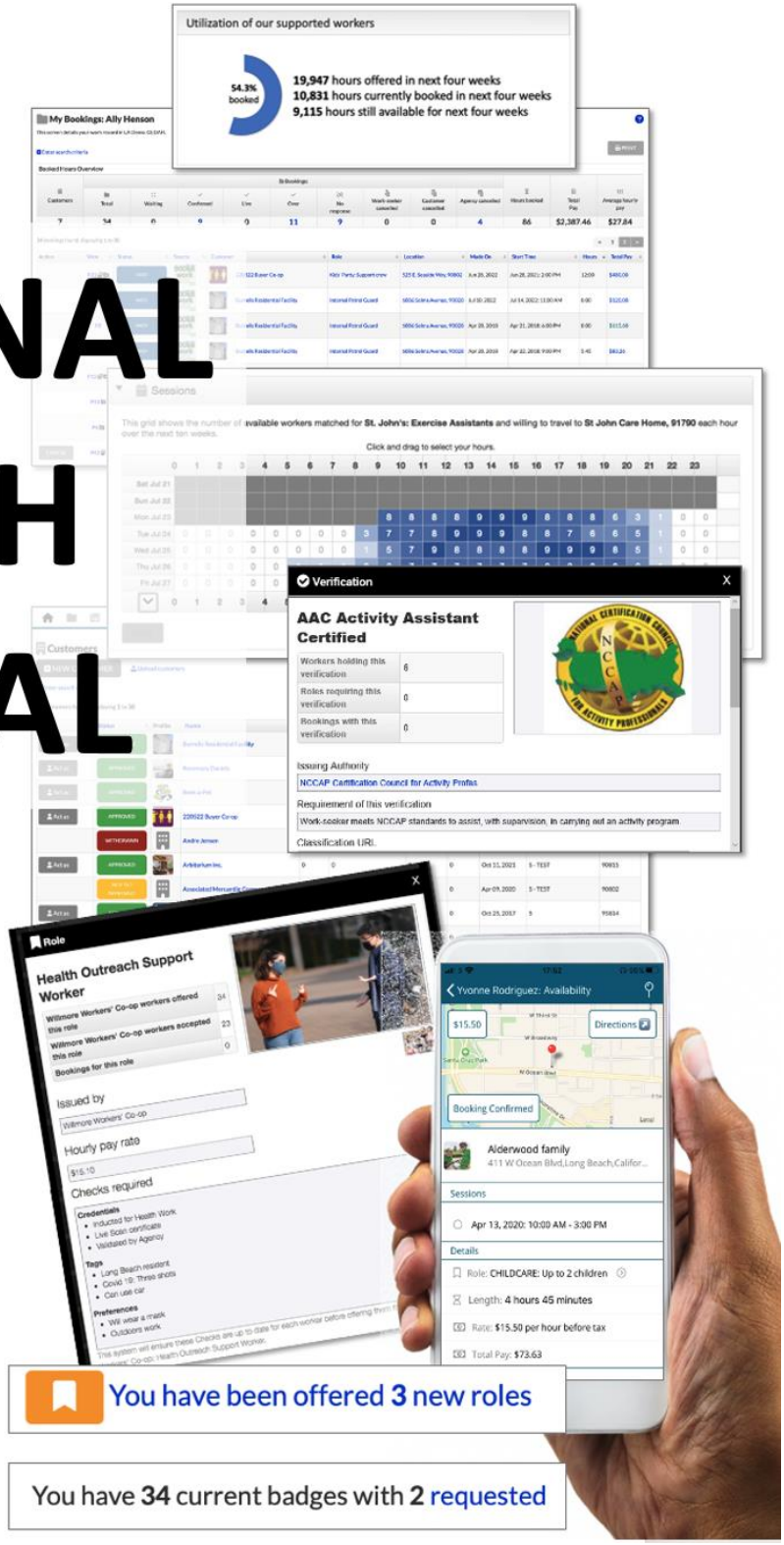
GoodFlexi

REGIONAL LAUNCH MANUAL



This manual is for anyone overseeing regional launch of a supportive platform for non-standard labor. It assumes you are familiar with:

- BeyondJobs.com
- Our report "How to make a Market for Irregular Employment: A guide for States, Counties, and Cities", published in July 2018 by Kauffman Foundation.

There is an online toolkit accompanying this manual. See Appendix 4.

Symbols used in this manual:
→ Relevant document in the online toolkit.
➲ Tip: A lesson we have learned

A word about wording. Your platform is configurable. It can describe itself and the entities involved in transactions differently for each user. This makes it intuitive for users, but we Backoffice people need our own consistent language. Throughout this manual, we use these terms:

- **Worker**: A person with hours available to be booked.
- **Buyer**: A department, company, household, or public agency that deploys workers.
- **Agency**: The entity that registers and controls permissions for its own pool of buyers and/or workers. Typically, it is the employer of record for its workers.
- **Pool**: A cluster of agencies. You will be building a pool for your region.

Document control				
Version no.	Document owner	Last saved	Last saved by	Last print
04	WR (231115)	11/10/2025 9:25 AM	Wingham Rowan	11/29/2023 8:44 AM
Outstanding tasks:				
Complete the online toolkit (see 230529 internal document)				

Introduction

Welcome to a labor market revolution! For years some of America's most marginalized workers have had to find the employment they need through online platforms. Those platforms, driven by corporates' need to cut labor costs have commoditized, controlled, and cheapened workers. Now there is a platform built around systematic empowerment. And you are a vital part of its early rollout.

The early days of any new market can be challenging because:

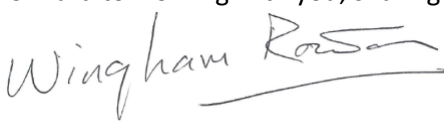
- **The significant costs, decisions, and risks are at the start**: Once operations reach solidity, the market can grow organically based on the rules, and structures, that have been set up.
- **An early-stage market is of limited use to its users**: It may not have enough workers for a buyer of labor's immediate need, workers may not get bookings at times they are available because there's only a small number of buyers, the data being generated is too thin to be meaningful.
- **The platform is new to each user**: Many will be reluctant to trust something untried. Everyone will hope someone else makes it work so they can come in when it's proved itself locally.
- **Resources are tight**: Funders want the new facility working before they invest significantly.

Your key goal is getting a local market to critical mass. This is where there is enough buying to sustain enough work-seekers so that everyone gets their needs met easily. You have probably used travel sites like Expedia? But imagine Expedia with only 20 hotels in its database; it would constantly be saying "*we have no rooms in your chosen location at your times".* That irritation is a constant danger for users in a fragile early market. Very broadly, we define $20m going through your market a year as critical mass.

This manual assumes a strategy we call a "Micro launches". That means the market starts with a few small buyers of labor, not enough to develop a critical mass of sustainable activity. But their bookings become the spark that lights a fire: there should also be an array of bigger users of flexible labor who stand ready to come in as the early activity acts as a proof-of-concept.

So, how do commercial gig work platforms get to critical mass? Typically, they buy market share. Uber, as example, will subsidize up to 60% of the cost of rides when they launch in a new city. That attracts a mass of buyers, so work-seekers have to follow. Uber then recoups it investment by retaining 30% or more of workers' earnings. That's not our playbook. You will need to step-by-step **make a market**.

Changing the labor market comes down to a sales and customer service mission. We anticipate that you will proactively outreach, engage, and organize in line with a local plan you build and refine. This manual aims to support you, based on learning in the UK and Long Beach, CA. A wider team are all looking forward to working with you, sharing learning both ways.



Wingham Rowan, CEO MM4A non-profit

MM4A
Modern Markets for All

Contents

Introduction **3**

Overview **7**

Setting up your operation **8**
a) Governance 8
b) Understanding of current status 8
c) Creating marketing collateral 8
d) Your platform 9
e) Market structures 9

STEP 1: Targeting **10**
a) Understanding your universe of buyers 10
b) Prioritizing buyers 10
c) Beyond buyers: Who to target 11
d) Record keeping 11

STEP 2: Outreach **12**
a) Vary your elevator pitch 12
b) Start with your connections 13
c) Umbrella bodies are low-hanging fruit 13
d) Focus on people as much as organizations. 13
e) Good processes make life easier 13

STEP 3: Engagement **14**
a) Constructing a business case 14
b) What to ask 14
c) Platform demonstrations 14
d) Misconceptions 15
e) Roadbumps 15
f) Proposal memos and Sandbox versions 15

STEP 4: On-boarding **16**
a) Set up an Agency 16
b) Importing data 16
c) Creating a payroll template 17
d) Training 17

STEP 5: Operational support **18**
a) Questions 18
b) Tools you can use 18
c) Encourage full use of platform content 19

ONGOING OPERATIONS: Routines 20
a) Agency touchpoints 20
b) Reporting 21
c) Proactively check for poor user experiences 21

ONGOING OPERATIONS: Processes 22
a) Triaging a tech. issue 22
b) Managing a market-user issue 23
c) Add more Backoffice users 23

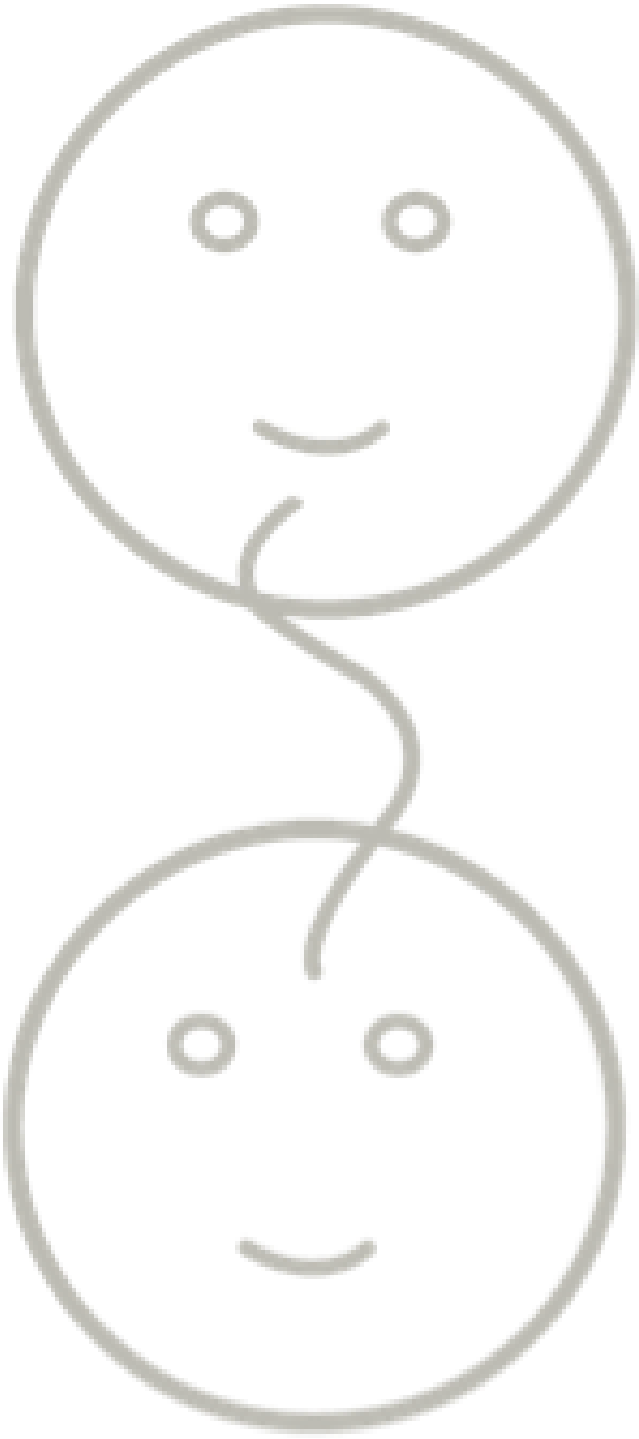
POST LAUNCH STABILITY 24
a) Financial stability 24
b) Growing a team 24
c) Continued growth 24

APPENDIX 1: Meet the team 27
a) Long Beach pathfinder: Pacific Gateway Workforce Partnership 27
b) Software development: Polymorphism Ltd. 27
c) Overall management: MM4A non-profit 28

APPENDIX 2: Employer-of-Record Issues 29
a) Operational issues 30

APPENDIX 3: Market structures 31
a) Contracts 31
b) Badges 31
c) Roles 32

This page intentionally blank



Overview

Your overall mission is setting up a new market, while attracting enough users to get it to sustainability. Broadly, our suggestion is you plan on three broad cycles of early-stage operations. Within each phase there are 5 steps to increasing usage.

Each of the three phases is defined by increasing levels of activity in your market:

- **Micro-launches**: Bookings by your earliest adopter organizations with a small pool of workers.
- **Main launch**: A bigger wave of activity involving more organizations and workers.
- **Growth**: This is where your earlier phase users are confident and operating with little support from you, generating data that can be turned into business cases for multiple further targets.

Within each phase we have learned to think in terms of 5 steps:

- **Targeting**: Establishing the stakeholders you aim to turn into users or advocates.
- **Outreach**: Approaching your targets and gaining their interest.
- **Engagement**: Exploratory dialogue with targets who are interested while constructing business cases that get them committed to using your platform.
- **On-boarding**: Setting new users up on the platform and training them.
- **Operational support**: Helping the new stakeholders use and fully exploit the platform.

With a $20m figure as guiding star, we suggest you broadly aim to reach that level of spend going through your platform annually within a year of Main launch. And you want the micro and main launches to be as close together as possible, ideally only 3-4 months.

From that point on, you can transition from driving outreach and engagement to a supervisory role.

➲ It can be insightful to see market-making as analogous to child rearing. Your market activity will go through phases that mirror those of human development.

At birth a baby needs constant looking after and has limited usefulness (to put it bluntly) for its creators. In childhood, a human becomes more robust, requires less support, and can do useful tasks. That increases through adolescence until the person becomes an adult, able to look after themselves, carry out all sorts of functions, and reproduce.

As a human develops, they need more food. A well-fed market follows this pattern of growth: the food is bookings of workers by buyers. Unlike a human, a market will grow as fast as the food it is fed. Get a very big buyer of labor feeding the market and it could go from baby to adult, reproducing itself into other sectors and adjoining geographies in a few weeks.

Setting up your operation

Robust structures and routines around your project should inspire confidence locally, making it more likely potential stakeholders will take a risk in endorsing or supporting you. It can also head off problems and keep everyone on their toes, increasing momentum. Here's our suggested checklist of steps. Focus is in on pragmatism to get everything going quickly but with refinement possible later. To help, we have provided starting point versions of much of what you will need in our online toolkit.

a) Governance

- **Initiation document**: Are you planning a memo that outlines stages, responsibilities, monitoring routines, and potential risks to your project? We offer our Long Beach expansion plan for inspiration. (→ 0A Project Description Document)
- **Project board**: Who will oversee your program? Ideally you want a broad range of employers, worker groups, and public officials. But to get going it may simply be you and a representative of your host organization, and – we hope - us, at monthly project review meetings. Assembly of a wider group of stakeholders can come as activity develops.
- **Reporting routines**: How will you be tracking your outreach, response, and uptake? What metrics do you see as benchmarks? (→ 0B Suggested market activity metrics)
- **Launch modelling spreadsheet**: There is a math component to market launch; checking everyone involved will get their needs met, and that your agencies at least cover their costs. We have a model that can be used to test your assumptions. (→ 0C Launch modelling spreadsheet)
- **Support meetings**: There is a depth of experience behind you (see Appendix One). We suggest a meeting at least weekly with us focused on local learning, what more you might need from us, and tracking progress. These should be timetabled at regular intervals.

b) Understanding of current status

- **Handover of contacts**: It's likely there has been local activity around your launch that predates you. We, or your host organization, can share details of who has been engaged.

c) Creating marketing collateral

- **Project name**: The GoodFlexi platform will be under local control and adopt your branding. What do you want to call it locally? And what is the logo? In Britain, the national government program chose Slivers-of-Time working. Stateside we have WorkLB / EBflexi / FlexPDX etc. Look for a short, local, name for which you can cheaply purchase the .com and .org URL's.
- **Demo platform access**: You will likely want to grant access to your **demo** platform to prospects. That's as simple as creating some accounts on it (maybe an agency user, buyer user, and worker), then sharing logins/passwords. And you should have the app on your phone (→ 0D: Getting a demo worker on your phone.)

- **Web presence**: A page on your host organization's website, or a standalone site, will give the people you approach a reassuring reference point about project substantiality. You may want a social media presence and a LinkedIN page can be useful when you approach targets there. Your toolkit includes draft webpage text (→ 0E Text blocks), pre-licenced generic pictures of flexible workers, and an array of GoodFlexi screens containing fictitious data (→ 0F Generic images).
- **Email text**: You will be approaching a lot of people, much of what you say in the early stages will likely be repetitive introductions to the program, its aims, and benefits. Again, we offer a first draft. (→ 0E Text blocks)
- **One pager**: You contacts will often ask for a pdf they can circulate to colleagues or their network. (→ OE Text blocks, contains one-pager draft text).
- **Invite for webinars**: Asking an umbrella body or your champion in an organization to host a webinar about the program is a time efficient way for you to gain exposure to decision makers. To save them crafting an invite text it's helpful to send a suggestion. (→ 0E Text blocks)
- **Slide deck**: Once in front of an audience you may want a few slides. Feel free to amend, and/or rebrand our standard pitch pack. (→ 0G Slide deck)

d) Your platform

- **Demo system**: If you're in a timezone in which we already operate we can instantly set you up with a demonstration/training version of GoodFlexi for you to brand/structure/develop as you wish (we will be on hand to help of course). One way to think of this task: like an online game in which you create characters and back stories who you then feature in demonstrations. You should get the app onto your phone (→ 0D Getting a demo worker on your phone.)
- **Live system**: Technologically this is as easy to set up as your demo. When we hand it over, it will be empty, but it will go on to contain real people's data, so we need a DataSec (data security) agreement with each backoffice user (that includes you). (→ 0H Data security email)

e) Market structures

To enable "good gig work", GoodFlexi uses contracts, badges, roles, and controls. The way you apply these tools locally can lay the ground for growth. Core features of your platform can be changed at any time of course. But doing so is unsettling for users who will have become used to a particular set of options. It's worth developing your core structures early on.

The core legal issue will be employer-of-record policies (See Appendix Two). Laws vary from state-to-state but you will need to decide who is eligible to be an employer on your platform and whether your host organization is to be one of them or not. (Appendix Three).

STEP 1: Targeting

Who are the biggest users of non-standard workers locally? How strong is your early-stage proposition for them? What barriers to adoption might each face? Who has pressing painpoints that can be addressed immediately? Where are the thought-leader individuals likely to endorse your initiative early on? These kinds of questions will produce a prioritized list of people you want to reach.

a) Understanding your universe of buyers

- **Define non-standard work**: "Gig work" can be convenient shorthand to open conversations. But your platform can do so much more than odd spurts of dog walking or delivery. We recommend the phrase "Non-standard Employment" (NSE). Think of three overall classes of workers:
    - **Standard workers**: Work regular hours at one location. (e.g.: an office receptionist).
    - **Freelancers**: Web-designers, copywriters, and the like can work remotely at times of their choosing to complete projects for which they are then paid.
    - **Non-standard workers**: They work either uncertain hours, **or** at changing locations, or both. This includes for example, Community Health Workers who may be on a 9-5 contract but deployed around multiple venues. (→ 1A Table of sectors relying on NSE)

b) Prioritizing buyers

- **Search for imminent projects**: Any **new** spending that will encompass Non-standard labor is immediate low-hanging fruit. There won't be existing ways of booking workers to be displaced. Look for funding for clean-ups, climate initiatives, public outreach, surveys (eg traffic enumeration), census/electoral register updating, archiving, tackling homelessness or social issues, and so on.
- **Public sector scores highly**: Sectors like distribution, care, building, hospitality, and retail rely heavily on flexible labor. But corporates now almost universally rely on workforce scheduling systems that deliver brutal cost-efficiencies. They have minimal incentive to help a market dedicated to empowering workers through its early stages. But public agencies have a wider remit and equally big numbers. A head of social services or public health for example will ultimately oversee hundreds or thousands of workers, either directly or through supplier organizations they could invite to join your program.
- **Private sector – look for the middle**: In the private sector look for a mid-market. Large corporates rarely give local managers discretion to change scheduling systems. Small players offer little demand. But mid-sized, non-franchise, players in care, building (eg house renovations), distribution, manufacturing, or hospitality can move quickly .
- **Plot where we can add most value**: Your addressable market (above) can usefully be prioritized around who you can be most useful to. (→ 1B Initial assessment of a target's need)
- **Rate on ease of connection**: Existing links to your host organization and its partners should grease the door opening. Check who is on the board of local public sector bodies for instance.

➲ Relations with your local WIB (Workforce Investment Board) can help in many ways. ((→ 1C Proposition for WIBs) Additionally, every state workforce agency commissions an all-sectors job bank. Browse yours to see who's listing for part time or flexible staff. Those organizations already expect a public agency to help them connect to candidates. Calling to ask if they'll look at a platform specifically for their kind of labor could be a win. Commercial job boards are also worth a search. We have cold called advertisers and onboarded them to our Long Beach platform.

c) Beyond buyers: Who to target

Buyers of labor can instantly move the dial towards increased market activity. But there are other stakeholders around non-standard work stakeholders. They include:

- **Intermediaries**: Staffing agencies, commercial or non-profit, already have buyers and workers and are connecting the two. Using their branded, controlled, version of your platform could cut overheads and open opportunities for expanding to ad-hoc workseekers or flexible businesses.
- **Connectors**: Retired public officials, local business leaders, and others will know multiple players in the local economy. It's worth getting to know them and seeing if they will make introductions. Electeds can be a great amplifier once they, or their policy lead, grasps your project's aims.
- **Umbrella bodies**: The Chamber of Commerce, a regional hospitality industry association, a network of care company CEO's, a healthcare providers' forum, tourism promotion agencies; all can be open to new ways of connecting to labor. Ask them to offer a webinar for members?
- **Worker sources**: We are wary of raising expectations of workers prematurely. But as the buy-side of your market comes into focus it's worth cultivating college's employment programs for their students, CBO's with an economic mobility agenda, workforce board email lists, and so on.
- **Funders**: Most regions have philanthropies keen to expand training, economic justice, regional improvements and other agendas. It's worth seeing if your program can align with projects.

➲ Factor seasonal need for flexible workers into your prioritization. February is typically when Parks & Rec departments start planning for how to staff their parks for summer's out-of-school activities, events, and peak times. IIf you are in a state with cold winters, February is also typically when tourist businesses start planning how to hire a summer workforce. In August, hospitality businesses are usually thinking about how to staff for their rush into Christmas. And look for local events. In Long Beach, the Grand Prix is an all-hands-on-deck time for the local economy, they tapped our workers in advance.

d) Record keeping

Targeting should soon get you to a prioritized list of perhaps an initial 20 targets. Then you need a way of storing your research, contact details, and their responses. That could be a spreadsheet of organizations, people contacted, contact details, and notes initially or a full CRM system.

➲ In the baby stages of your market be wary of organizations dedicated to individuals with significant barriers to labor market entry. A more mature market can be hugely effective in including, supporting, and monitoring people with special needs. But early-stage activity is typically too fragile for people who may need high-touch support. They may be better with scheduling by people, not a platform.

STEP 2: Outreach

Getting through the door of your targets can be the hardest part of the entire project. Connections can be leveraged, roundtables or other awareness raising initiatives may bring inbound calls. But it's unlikely you'll get to critical mass without some cold-call approaches. Efficacy of your outreach operation can be a key determinant. of success. Here's what we've learned so far.

a) Vary your elevator pitch

Be wary of selling people on the benefits of a mature market, it invites the response "*Yes, I could use something like that, come back when you have thousands of workers on the platform locally*". You need a 2-3 sentence explanation of why each target should come into an early stage market. Try:

- **Staffing pain points**: Need for more responsive staffing, a shortage of workers (people who need fluid employment are your region's "hidden workers" often invisible to companies or agencies that need them), or seasonal surges in business are all problems we can address immediately.
- **Inefficiencies**: Many organizations have existing buyers and workers but need better processes or visibility of workers' skills/availability: in Long Beach, one department already had a drive to move off paper timesheets and saw that functionality within GoodFlexi as the solution.
- **New opportunities**: More responsive services or better ability to respond to rush orders require flexible labor. An early adopter will have a proposition for customers or service users who want responsiveness.
- **Workforce quality**: Your workers will typically be more motivated and local than temp agency people. They can involve lower overheads. A major union in California is taking GoodFlexi to stadiums it works with suggesting they help set up a market for additional hours of members, already approved to work at each stadium. Managers could then book extra time from the stadium's core workforce when an event was busier than expected, rather than using agency temps who are unlikely to understand the operation.

➲ At-home care for seniors and people with disabilities is moving in many states towards a self-determination model. This gives each family a budget with which they buy the hours of caregivers they like. In Long Beach we have private agencies running a market in which families (buyers) are each given an allocation of hours or dollars per month and approve one or more caregivers (workers) they like. The agency becomes employer of record.

It's worth talking to someone with an overview of your state or region's homecare priorities. Self determination creates local employment opportunities but is sometimes resisted by families because it is assumed it will all be so complex to organize. We can solve that. The term "Financial Management Services" is sometimes used by care companies in this business.

b) Start with your connections

If your project is housed within a public agency like a workforce board they will have board members, suppliers, and business development staffers all of whom could be conduits to targets. Those targets in turn will have useful personal contacts they might pass you on to.

c) Umbrella bodies are low-hanging fruit

Your state or region will likely have convening bodies for local governments, hospitality operators, care providers, and businesses generally (eg: Chamber of Commerce). Part of their value to members is horizon scanning: finding new, interesting, things to share. The right person in each body can not only potentially broker a slot at a convening for you, or space in their newsletter, they can also point you towards members who have painpoints, or just an appetite for learning about emerging possibilities.

Any public agency or NGO with an economic development or inclusion brief is also likely to be receptive. And they will have a good idea of who is responsive to their initiatives and might engage with yours.

d) Focus on people as much as organizations.

Sometimes we find an organization that clearly needs our kind of workers. But we can't find anyone there who will engage. Meanwhile, elsewhere there's a senior manager overseeing a regular-hours workforce, but with an abiding commitment to social equity and inclusion locally. The second person can be worth approaching with a "*Can I pick your brains*?" email. They may have come across like-minded counterparts running more fluid operations or have ideas of how to break into resistant targets.

➲ Don't overlook your emerging expertise as a tool for door opening. You will be immersed in a typically little understood part of the local economy; non-standard employment. An offer to share your learning can elicit a meeting more readily than an attempt to immediately get an organization to sign up.

e) Good processes make life easier

We have become used to a depressingly low response rate to first time approaches. People don't understand what we're offering, assume there's a catch, are swamped by existing priorities, or just want others to go first and get the market to critical mass before they will engage.

So, polite, persistent, personable, follow ups have to become a core competency. We typically review a target list at a weekly meeting and decide who needs another call, a switch to one of their colleagues for our approaches, a search for someone in our network who might act as go-between to a key decision maker, or just a flag to ignore them with a calendared note to revive contact in a couple of months.

Another aspect of your routines to consider: a monthly e-newsletter about your progress and findings that keeps you popping up across inboxes (assuming people you talk to express enough interest in joining the recipients' list), or scheduled monthly webinars to which anyone can be invited without them having to express enough of a commitment to merit a one-on-one session.

STEP 3: Engagement

Once your outreach has gained some mindshare with targets, they should start devoting time to meetings or online calls for a deeper dive. People will want to know what your program is about, what it might do for them, what it will cost them, and who else is onboard. We want to help you make best use of their time.

a) Constructing a business case

A first meeting will probably be built around you trying to get further facetime with the person, or their colleagues. It takes time for them to get up to speed. We tend to frame the reason we think they will be interested around possibilities like (a) tapping a new source of workers (b) localized workers (c) benefits of flexibility/responsiveness (d) administration efficiencies (e) visibility/reporting of activity and worker availability (f) community engagement (g) benefits of moving before other employers locally.

➲ We try to focus on an opening statement for each meeting that sums up our view of the possibilities and invites questions. For example "*Thanks for making the time for this. I run a new program at the workforce board focused on a platform for people who seek flexible work. We think you use flexible workers and it could help you cultivate a pool of regular top-up workers. There's no charge to you and it would enforce all your rules. Does that make sense?"*

b) What to ask

Your overarching aim from meetings is to understand (a) the value of your program to them (b) the value they could bring to the program (c) steps to a decision to commit (d) likely on-boarding process. We try to get the other person talking, rather than enduring a presentation from us. For example, it can be good to start with an open-ended question such as "*How much do you feel you already know about the spread of flexible work?*"

Any statements or questions from the prospect should of course form the structure of your conversation but there are questions you will want to be ticking off in your mind to answer the basic points above.

→ 3A Suggested questionnaire for a research interview

c) Platform demonstrations

Showing the platform in action makes it tangible and can excite managers. But we try not to do full run through presentation unless asked; otherwise you can easily do too much of the talking at a meeting. It's better to have the platform up on your laptop or cellphone then dip into it to answer their questions. For example, you should anticipate questions relating to badging early on. ("*We only use people who have been inducted in our processes and have a Live Scan certificate. How do you handle that?")*

Once you have shown a (fictitious) workers' badges page, they know you have the system on hand. It can be gracious to ask before dipping into it again. "*Can I show you how you would make bookings?*"

d) Misconceptions

People often have a preconceived notion about anything to do with gig work: exploitative, low quality transient workers, badly paid, destructive of jobs. Be sure you are ready to explain or demonstrate:

- **No change to contracts or workers**: they can bring over their existing arrangements and workforce. Your platform will (a) try to get the workers more hours elsewhere if this organization can't provide enough (b) be a source for further workers.
- **The system is configured for the employer**: It picks up their terminology, branding, and rules. It can appear to sit within their existing websites. We don't push a brand or business model.
- **It does work for regulars**: Many leaders don't want one system for regular workers and another for top-up staff. Your platform can handle regular hours, it's just it can do so much more on top. Putting 9-to-5's schedules into your system gives the employer seamless data on all staff.
- **Undocumented people can be served**: The platform need not know anything about a work-seeker other than a reference (eg: "Worker 76") and their employer-of-record.

e) Roadbumps

You may find a manager enthused about signing up, but barred from doing so by something outside her control. It's worth trying to flush out any such issues early on (see the section in the questionnaire above for how to ferret out these issues early in a dialogue). We look for potential challenges around:

- **Procurement**: Is there a rule such as "*we must get bids from three of your competitors*"? This can usually be overcome with a single-source agreement because GoodFlexi is so unusual.
- **Union agreements**: Public agencies often need a meet-and-confer process with their union before any changes for staff. We can help draft a paper for union representatives, it will make the point that nothing changes about employment terms, and we bring opportunities for extra work for non-standard employees.
- **Mission around full time**: Some organizations are rooted in job creation with no interest in non-standard workers. We try to resolve this with (a) explanations of why so many people need work but can't do a job (b) FTE (full time equivalent) calculations that GoodFlexi can produce.

f) Proposal memos and Sandbox versions

We typically aim to offer a "Proposal Memo" after the first or second meeting. It outlines the badges, roles, and configurations we think they will want plus a business case and timetable for working with us. (→ 3A Generic proposal memo) Expect some refinements to emerge in a next meeting after which you should be ready to set up a "sandbox" version of the agency with their branding, their terms, and some of their buyers/badges/roles in your demonstration platform. Upload some fictitious workers, make some bookings and you now have a market that feels real. That can allow final refinement before you set them up in the Live system. (→ 3B Fictitious worker file)

➲ Your personal conviction is important. It's worth addressing any niggling concerns you might have about the program with us. And never be afraid of saying "*I don't know, I'll find out*" then emailing us.

STEP 4: On-boarding

Your prospect has said Yes! Now it's time to put them on the platform. That's partly about creating an "agency" within the system for them, then getting it ready to go. But it's also about preparing them to use the platform confidently. This section outlines the logical steps.

a) Set up an Agency

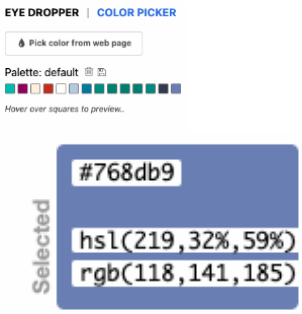
Internally we call an employer-of-record on the platform an "agency'. You can change this term for any agency of course. (See Apendix Two"Employer of Record issues".) You will need to be sure the prospect meets standards defined in your project requirements (→ 0A Project Initiation document) and agrees to any conditions imposed. Set up is then about configurations.

→ 4A Configuring an agency.

Be aware two aspects of GoodFlexi functionality were funded by a private company in Long Beach: Cambrian Homecare. They are entitled to charge any agency wanting these tools switched on. They are the timeclock in our app and ARA (Automatic Re-Assignment of failed bookingsI. We can liaise with Cambrian to get a price.

If the platform is to appear to sit within a prospect's website you will need to provide their webmaster with HTML code for portable log-in boxes then enter their page's URL in the "Exit page" field in GoodFlexi. To see these boxes visit www.angelenocare.com or www.900068work.org. Both have logins to demonstration GoodFlexi.

→ 4B Portable log in code



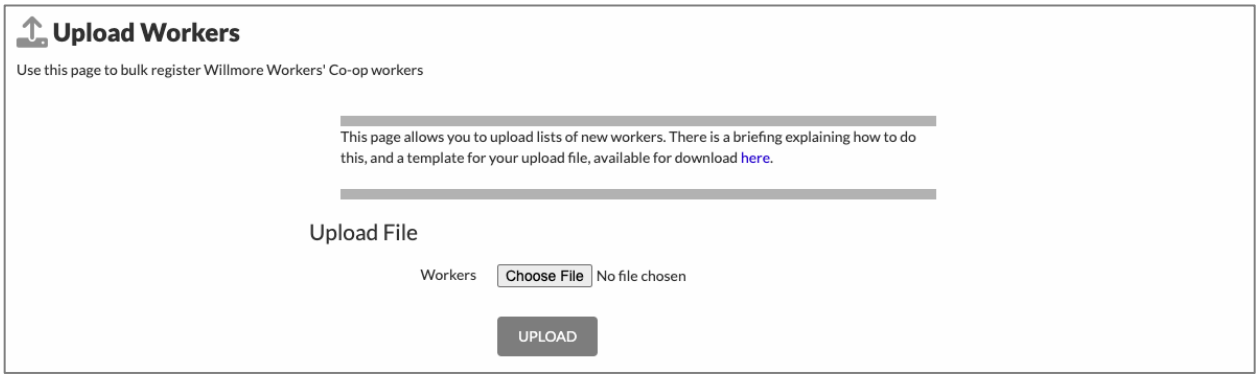
➲ If you want to match the colors of an organization's existing branding in GoodFlexi, get their website in Google Chrome and load the "Eye dropper" application. You can then point the dropper at any part of their site to get an RGB code for the colors they use. Enter those codes in GoodFlexi's agency's branding page for a perfect match.

b) Importing data

If your new stakeholder already has a list of workers or buyers who will be using the platform, get it into a spreadsheet. It can then be uploaded, 50 rows at a time, into GoodFlexi without rekeying.

→ Support for uploading buyers is here, and for workers is here.

➲ Importing data can reveal inadequacy of record keeping in an organization. It's worth asking to see their data file of workers or buyers in advance. We have seen spreadsheets full of duplicates, missing key fields, or containing a lot of out of date data. In this situation, time needs to be allocated to clean the data before it is uploaded.



c) Creating a payroll template

GoodFlexi is payroll agnostic. Employers may use Paychex, ADP, Quickbooks, or another provider to issue paychecks then allocate tax and benefits. GoodFlexi simply generates a file of every possible column pertaining to a set of timesheets.

A payroll administrator at each agency can apply a row of red and green strips to that export file; columns with a green header are retained, those with red can be deleted. In this way, an export file of 35 columns can come down to 7 or 8. Different providers require slightly different columns.

➲ Even common payroll systems can have different intake settings. So, a new template typically needs to be made for each agency. We can create this template for you the first time, it just requires a list of the intake columns used by this agency. We then map each to the appropriate GoodFlexi column.

This is the top rows of a Paychex template (red columns are not needed for Paychex, nor are yellow columns but they're worth keeping until the input file is ready as a cross-reference for any anomalies, green columns need to be ordered numerically once the red columns are deleted):

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
4	1	SAFETY								6			5	
5	BOOKING ADMIN									WORKER PAY				
6	booking_no	timesheet_no	worker_pjn	week_ending	week_no	timesheet_date_from	timesheet_time_from	timesheet_date_to	timesheet_time_to	hours	cost_p_h	total_cost	worker_p_h	ap1_reason

→ 4C Creating a payroll template, 4D Paychex template

d) Training

In parallel with the above tasks, there's the human component. Key users at your agency need to know how to use the platform. They don't need to understand it all on day one, workers need to know how to respond to bookings, buyers need to know how to make bookings; once they've got that, the system can start serving them and further functionality should become intuitive.

We have a range of training materials you can download and amend. → 4E List of training materials

STEP 5: Operational support

As you gain users, there will inevitably be a flow of queries, niggles, and confusion. A customer service mindset is vital at this point. You can see everyone's data and override most system controls to make things happen. But always confirm in an email if you carry out an action on the instructions of a user, otherwise you might cross a line into becoming a co-employer. Here's what to expect.

a) Questions

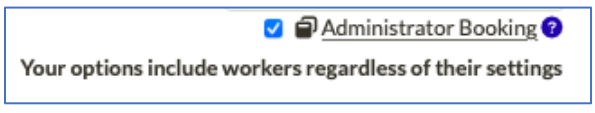
You will encounter queries from users. Here's a snapshot from Long Beach:

Concern	Underlying reason	Solution
"The one worker with my role isn't showing for bookings even though I know she's available"	The worker was based 400 miles from the place of work. GoodFlexi has an absolute cap of 60 miles travel to work.	The worker had entered her home address (where she wanted pay checks sent) but not entered a different base address (where she was actually living). We entered her current residence as a base address.
"It won't let me change details of a badge"	Once a badge or role has been offered to a first worker, GoodFlexi locks the wording.	We explained the lock is to protect workers and buyers.. Otherwise they could accept a role, or rely on a badge, which had its terms or meaning changed later. Agency can create new badges or roles if they want to change things.
"I can't export my payroll file"	The file was too big to come down the user's internet connection.	Any table in GoodFlexi can be copied by clicking on the top left cell and dragging the cursor to the bottom right corner. This allows the device clipboard, rather than the internet to be used for transfer into a spreadsheet.
"I can't change my password"	High level users can't change passwords through email for security reasons.	These users with access to sensitive data in bulk must get another superuser at their agency, or you, to reset their password after re-establishing their identity. They then reset it immediately for themselves.

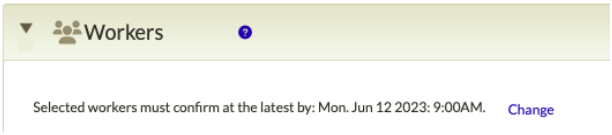
b) Tools you can use

Some functionality within GoodFlexi that can solve problems:

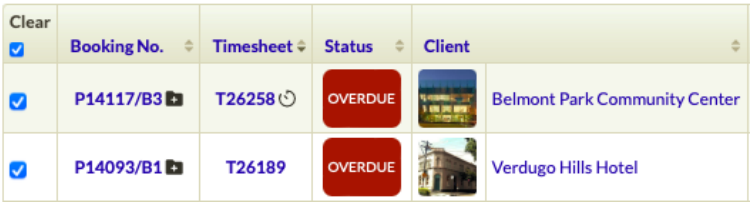
- **Administrator bookings**: You can give each agency the right to make bookings that override protections, accounts, and other system settings. It also allows you to enter bookings retrospectively; ones that happened last week for example. So, if a buyer has arranged things informally with a worker, agency staff can get confirmation in an email and turn it into a system booking later. Agencies can give their buyers Administrator rights.



- **Manually change "Confirm by" times**: Your platform sets a time by which workers who are booked - but not auto-confirmed in an Administrator booking - must respond or lose the booking. If buyers are booking late at night and are relaxed about confirmation they can set a confirm-by time in the morning, if they need confirmation quickly they can set a shorter time than the system has calculated.



- **Badges**: You can create a badge for *anything* then use it for reporting or filtering. They can be a tool for tracking a workers' progress through an onboarding process, or that one agency has proposed them as a good fit with another, for example. (See Appendix Three.)
- **Next-best addresses**: GoodFlexi uses the USPO database of valid US addresses and rejects any location that is not on that list. It's not perfect; sometimes new builds take time to be registered for instance. Faced with this, just find the nearest existing address on Google Maps (which is also using the USPO data) and enter that, then use reporting instructions to advise it's the building nextdoor.
- **Clear timesheets**: The system creates a timesheet for each week that a worker is booked by a buyer as soon as the booking is confirmed. Sometimes the worker still doesn't show up, or the booking fails without being cancelled. You want to banish these timesheets from your processes. Just set the status to cleared on the page listing Overdue timesheets and you won't see that timesheet again, unless you specifically search for cleared timesheets.



➲ We recommend you avoid doing too much for users, they can become dependent on you rather than confident in the system. It is better to teach them how to solve problems for themselves.

c) Encourage full use of platform content

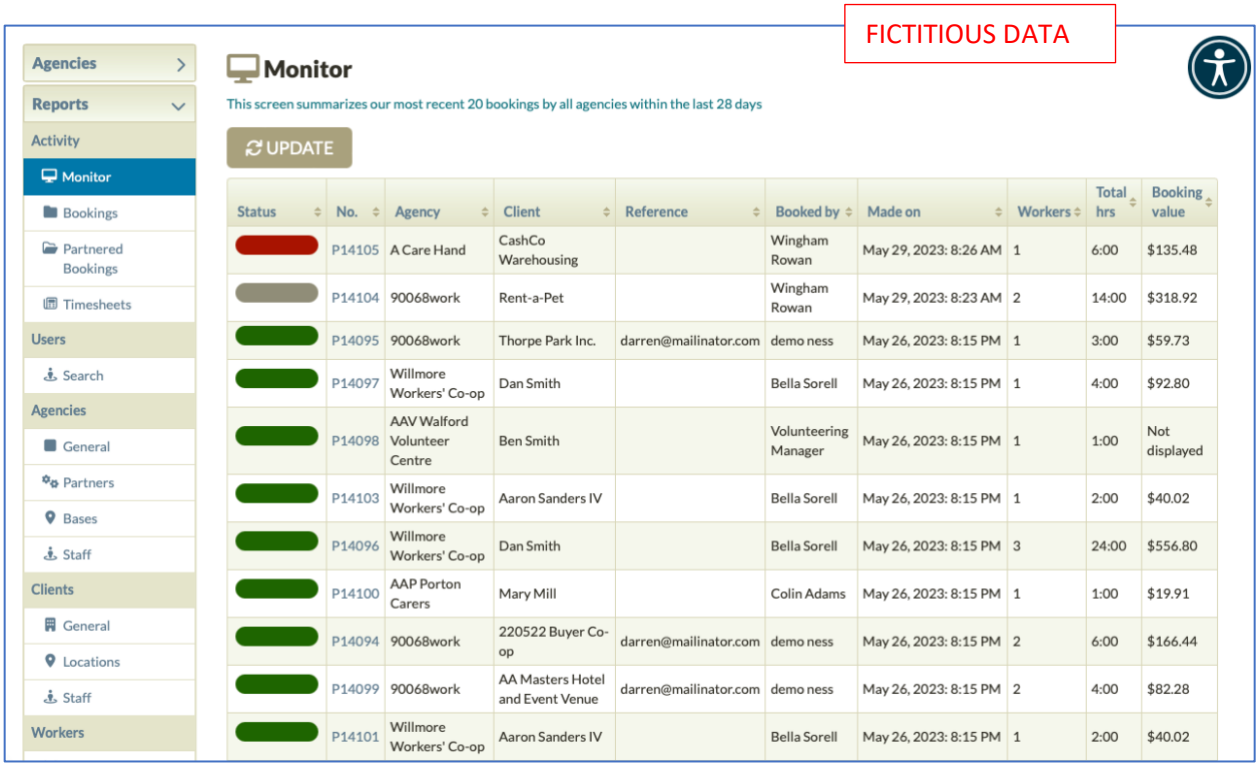
Your system will look more inviting to all users if there's photos of buyers and workers loaded. Chances of attracting workers, or finding work, are increased by a few sentences of introduction in profiles. Entering information may seem tedious, but it enables reporting. We have had one agency that didn't record its workers' dates of birth, just setting everyone to 18 on the day they registered. They then had no way of capturing age-related insights about their workforce or activity.

→ 5A GoodFlexi System Manual.

➲ Some people or organizations don't want to load photos of themselves. An agency may mandate that they have to because it protects against fraud (for example, a worker with a homecare qualification could be booked but send along an unqualified friend, splitting the earnings). If not mandated, another option is to allow upload of any image: so for example, a cuddly toy, a pet, a sports team logo all create visual references that brighten their screens and allow instant identification of the person ("I want to book the Dodgers fan again") without compromising a desire for privacy.

ONGOING OPERATIONS: Routines

As activity picks up in your market, some weekly routines should forestall problems, keep everyone informed, and allow you to allocate your time; all with maximum efficiency. To keep an eye on market activity, the Backoffice Monitor screen is invaluable, showing transactions from all your agencies as they progress. You may want to look for any status bars that turn red and investigate. Other than that, we suggest three sets of regular routines.



Status	No.	Agency	Client	Reference	Booked by	Made on	Workers	Total hrs	Booking value
	P14105	A Care Hand	CashCo Warehousing		Wingham Rowan	May 29, 2023: 8:26 AM	1	6:00	$135.48
	P14104	90068work	Rent-a-Pet		Wingham Rowan	May 29, 2023: 8:23 AM	2	14:00	$318.92
	P14095	90068work	Thorpe Park Inc.	darren@mailinator.com	demo ness	May 26, 2023: 8:15 PM	1	3:00	$59.73
	P14097	Willmore Workers' Co-op	Dan Smith		Bella Sorell	May 26, 2023: 8:15 PM	1	4:00	$92.80
	P14098	AAV Walford Volunteer Centre	Ben Smith		Volunteering Manager	May 26, 2023: 8:15 PM	1	1:00	Not displayed
	P14103	Willmore Workers' Co-op	Aaron Sanders IV		Bella Sorell	May 26, 2023: 8:15 PM	1	2:00	$40.02
	P14096	Willmore Workers' Co-op	Dan Smith		Bella Sorell	May 26, 2023: 8:15 PM	3	24:00	$556.80
	P14100	AAP Porton Carers	Mary Mill		Colin Adams	May 26, 2023: 8:15 PM	1	1:00	$19.91
	P14094	90068work	220522 Buyer Co-op	darren@mailinator.com	demo ness	May 26, 2023: 8:15 PM	2	6:00	$166.44
	P14099	90068work	AA Masters Hotel and Event Venue	darren@mailinator.com	demo ness	May 26, 2023: 8:15 PM	2	4:00	$82.28
	P14101	Willmore Workers' Co-op	Aaron Sanders IV		Bella Sorell	May 26, 2023: 8:15 PM	1	2:00	$40.02

➲ Your Backoffice data agreement with us mandates active logout. It's tempting to leave the Monitor screen up on your desk. But if you're in an office or other public space, you must log out (not just close the browser) when stepping away even for a few minutes.

a) Agency touchpoints

Systematizing a regular visit or call with each agency encourages them to save trivial issues for next week's session rather than bombarding you with messages as things pop up. It also allows you to structure dialogue to, hopefully, keep encouraging them to exploit your programs potential to serve their needs and grow their operations.

We tend to suggest an agenda for weekly calls like this: (a) activity over the last week, any issues? (b) any support needed, for example training new staff members (c) possibilities for their use of the platform that might be worth exploring (d) feedback from them to the program.

b) Reporting

You can pull up-to-the-minute data out of GoodFlexi at any time. But doing it regularly, every Friday lunchtime for example, allows like-for-like weekly comparisons and should minimize requests for ad-hoc reports. You will likely have a set of metrics against which you report progress. (→ 0B Suggested market activity metrics)

➲ You can quickly make a generic dashboard in a tool like Powerpoint, then populate it with this week's data. GoodFlexi uses the Fontawesome icon set, so you might want to do the same. We tend to back up these summaries with raw data which removes personal identifiers but leaves reference, booking or timesheet numbers intact (→ 6A Sample anonymized export file). That means your dashboard can be audited by someone with backoffice clearance.

This data must be anonymized to protect user privacy. We suggest a rule that no buyer or worker can be involved in more than 25% of transactions in any dataset. If they do, your dataset is too small and could reveal a user's activity. Remember roles, locations, and times of bookings can all be giveaways for an informed reader, so consider carefully which columns need to be blanked in any distribution of underlying data exports.

For added protection, we recommend a two-step process for release of raw data. A first backoffice user compiles and anonymizes the raw data. But it is not released until a second backoffice user with a fresh perspective signs off that it contains no giveaways.

➲ Consider periodic subset reporting (for example: "a focus on activity by our registered students") or look for stories in the data. During a week of snowstorms in one of our London markets we found one dogged retail worker who had turned up for bookings at 6 different stores to keep community services available. The agency turned him into a hero in the local media.

c) Proactively check for poor user experiences

There are some basic "market hygiene" checks that should catch any unserved users before their experience becomes too bad. It's worth using your access to agency activity screens to look for:

- **Long lags in approval time**: Search on Not Yet Approved buyers or workers and order them by date of registration. Gaps of more than a week might merit a call to their agency. (Use the agency's main buyer or worker page).
- **Overdue timesheets**: Too many of these suggest workers aren't getting paid promptly. A search on timesheet status, followed by a scan of dates of work will quickly flag anything untoward. (Agency's timesheets page, then click the button for "Overdue timesheets".
- **Last booking gaps**: Run down a list of buyers or workers ordered on date of last booking. If there's a lot of lengthening windows, something might be wrong. (Use agency's Reports tab, then select buyers or workers and click for the "Activity" columns.)
- **Unbadged or unbooked workers**: Order workers by number of badges or number of bookings. Too many zeros, particularly if registration was weeks ago, probably merits a call to the agency.

ONGOING OPERATIONS: Processes

Non-technical people often assume a sophisticated IT platform such as GoodFlexi is like their fridge; you install it then take it for granted for 10 years. In reality, they are more like your dog; a complex entity of multiple underlying systems needing constant attention and prone to getting sick if neglected. And all sorts of things can happen among humans in your market. Your operational life won't be all predictable, however good your routines. Here's some processes to be ready for.

a) Triaging a tech. issue

Twitter crashes unexpectedly. Global airlines cancel flights because underlying IT systems overload. Amazon freezes across the east coast. We'd love to tell you GoodFlexi will always behave impeccably, but we can't. Our developers have "hotfix" channels for dealing with sidewinder problems, but an accurate, detailed, assessment of any issue from your end can take hours off a cure.

Developers have a saying: PICNIC (problem in customer, not in computer). It's true, most problems reported by your users will be based on misunderstanding or assumptions the system will meet their specific needs rather than serving a broad range of users while enforcing fairness for all. The first thing to do when a platform problem is reported is confirm it is on GoodFlexi servers, not unique to the user.

So, if a user tells you the system isn't behaving as they expect, check it's not a dodgy connection, out-of-range GPS, or outdated browser problem at their end. If they tell you the system is down, just hit any GoodFlexi log in button, if you get a log in error page returned, the servers are fine, it's a user issue. But if there's something odd at our end, step two is to see if it is replicable: can you make the problem occur? Non-replicable problems do occur in servers but they're more likely local to the user's browser, device, or connection. You need to tell developers how to make the problem occur so they can fix it.

→ 7A Resolving a user's issue

Some issues we have seen in the past:

Problem	Cause	Fix
Images (eg worker photo's) stopped displaying	Hackers discovered how to insert malicious code into JPEG files, AWS security froze our image files	Security patch to screen for malicious code in image files
Some accounts wouldn't allow bookings	The accounts had roles locked to them which were then withdrawn, so the software couldn't find the only role allowed for a booking against that account	We are inserting a block to stop users withdrawing a role if attached to an account.
A worker's hours of bookings tally differently on different screens	There are many valid ways to calculate how many hours a worker has worked (hours booked, hours in completed bookings, hours entered on timesheets, hours payrolled, etc.)	We use the most relevant metrics on each screen. But these are progressively being unified around one standard. The same is true of "number of workers with a badge" counts.

b) Managing a market-user issue

One UK local government used GoodFlexi to train, then book, a pool of election surveyors: workers who go round households that didn't file election paperwork asking for confirmation of who lives there for a form. A member of the public spotted someone faking signatures on these forms in a McDonalds one rainy evening and tipped the local paper. Journalists realized election workers were booked through a platform which the ruling party locally had advocated. Cue outrage.

The problem of course was one irresponsible idiot who subverted everything he'd been taught and contractually agreed. How he was booked was immaterial. But the system was spotlighted. It happened again in East London where anti-terrorism police realized we had availability and work time/location data on a suspect. Would we release it without telling him?

Your contractual agreements with agencies are pivotal in these flare ups. Always remember, the data probably isn't yours, it's likely the property of the agency. (We referred cops to the agency superuser.) And the platform doesn't make decisions about who is allowed to do what, only intake the judgements of its agency users: the Macdonald's forger was badged by City Hall as a "certified election worker".

It's unlikely, but to avoid deer-in-the-headlights moments if an issue like this comes from left field, we recommend preparation of an Incident Handling memo as market activity deepens. It could address:

- **Clear lines of authority**: Who will take charge of any unexpected situation?
- **Get in front of events but offer no assessment**: Someone should be ready to release a statement in any unexpected situation. It should confirm only that the matter is being investigated urgently and there will be an update in X hours. Do NOT blame anyone else or implicate the platform, or your program. As President Obama famously said of a much bigger issue "*We will go where the facts lead us*".
- **Investigate rigorously**: The agency who misjudged someone's eligibility may be of little interest compared to a new platform. The agency need to be prompted to sort things out.
- **Use platform tools**: Within your contractual agreement with an agency you could respond to a bad situation by; (a) suspending all staff of an agency (b) badging any buyer or worker vetted by a clearly unsound manager at the agency as needing rebadging and cancelling their bookings in the meantime (c) urging the agency to release information such as bookings by a rogue worker so that authorities can contact their counterparties.

c) Add more Backoffice users

We hope your team will be stable, but do remind any leavers their Datasec (data security) obligations outlast their employment. But you may need to onboard additional staff. It takes a minute to do so (see the "Staff" tab in your Settings side menu). But the rights those people gain, even if limited to low ("frontline") level, merits scrutiny and training. Before gaining a Backoffice password, they must confirm acceptance of our DataSec agreement (→ 0D Data protection email). We also recommend posting data security reminders around your office.

POST LAUNCH STABILITY

Your launch period will be a rollercoaster at times. But, as transactions mount, it should transition into a period of relative stability when you have a bulk of users who understand and can rely on the market. Be ready to shift to a new set of priorities at this point.

a) Financial stability

Your startup funding will have to evolve into something more long-term. We see some combination of three possibilities:

- **Public funding**: Every state workforce agency commissions an all-sectors job matching platform. We think they should do the same for people not blessed with regular availability for work.
- **Philanthropy**: Given the potential for inclusion and interventions, a local funder might make a long term commitment, particularly if you can produce compelling stories from the data.
- **Transaction charge**: GoodFlexi can be set to add a percentage of worker pay into the charge for each hour worked. A 1.75% levy on $20m of annual turnover would deliver $350K which could pay for a small team and system costs. The charge is set on each agency, so private sector players could subsidize non-profits or government bodies; if they will tolerate it.

b) Growing a team

With finances sorted, you might need more people. (→ 8A Job Description.)

c) Continued growth

With data, satisfied users, and operational experience, there's a range of growth initiatives to consider:

- **Press coverage**: Compelling stories of personal hardship overcome are a staple of irregular work markets. In Britain we took people recovering from horrendous accidents, adopting sick children, and striving to keep parents with dementia at home to reporters. And don't forget anyone using your program around a life quest. We got publicity from an aspiring Olympic canoeist who needed work around rain, when rivers were in flood he was shooting down them!
- **Bespoke functionality**: We have a roadmap for GoodFlexi development. Some of your users will want tools not yet built. If they have funding, we can deliver.
- **Disrupting corporate systems**: Walmart schedules workers through a platform used in all stores. Could you persuade a local manager to book her workers through your program instead, while you ensure they are exposed to other opportunities constantly? Probably not in the early stage. But perhaps try later when she is seeing her flexibly scheduled staff coming over to you.
- **Raise standards**: In Long Beach, the workforce board told restauranters they couldn't access our pool of flexible workers with hospitality credentials while paying only tipped wage. The deeper your pool of provenly reliable workers, the more clout you have to force the floor up for all workers locally.

APPENDICES

APPENDIX 1: Meet the team

We're excited to have you on this journey and we're all here to support your efforts. The software sits within the MM4A non-profit. But your extended colleagues are spread across four organizations each with their own expertise to offer.

a) Long Beach pathfinder: Pacific Gateway Workforce Partnership

The team behind WorkLB have tackled many of the issues you will encounter. James, who runs things day-to-day comes from a commercial and recruitment background and oversaw our pandemic childcare pilot at Skills4Care, the non-profit acting as employer of record.

		NO IMAGE	
Brenda Cortes Program Co-ordinator	James Lindamood Hd. of Economic Innovation	Utilia Guzman Head of Special Projects	Nick Schultz Ex Head of Workforce Bord/ Advisor

b) Software development: Polymorphism Ltd.

Based in the north of England, Polymorphism is a collaboration of experts in large scale enterprise platforms, typically for government. They maintain the 20 or so systems underpinning GoodFlexi and work in multi-week cycles of development, each culminating in a build (an updated version of the platform). We will share details of what is in each update, and invite you into planning of future builds.

				
Alice Spring Java/Mobile Developer	Vanessa Tate Senior Tester	Cari Morton Project Manager	Vic Luscombe Senior Java Enterprise Dev.	Tom Baldwin Technical Architect

c) Overall management: MM4A non-profit

MM4A stands for “Modern Markets for All”. Our mission is ensuring 21st century economic platforms are harnessed to enable, progress, and empower lower income households, not just cut labor costs. Wingham ran UK market launches and oversees US operations. Whatever you encounter, he’s probably already seen it somewhere and can advise.

				
Wingham Rowan Founder/CEO	Richard Manby Advisor	Richard Tyrie Board Member	Rob. Challis Board Member	Sir Harvey McGrath Board Chair

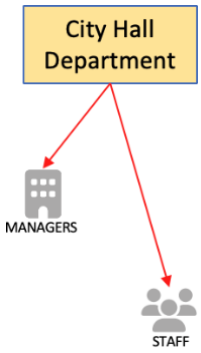
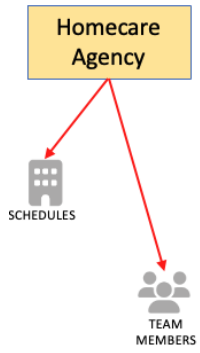
APPENDIX 2: Employer-of-Record Issues

Having an Employer-of-Record is a key difference between good "gig work" and bad gig work. Silicon Valley's platforms typically make each worker an independent contractor or "1099". GoodFlexi is configured for everyone to be a "W-2[*]"; they have a contract of employment guaranteeing protections and benefits. There are multiple models for how these employees connect to work.

GoodFlexi delivers protections through an entity we internally call an "Agency[†]". As a backoffice user, you can create and oversee an infinite number of agencies. Each agency can then:

- **Set up badges and roles**: These can be agency-wide or unique to one buyer.
- **Register buyers of labor**: Benefits and agency overheads are added to the cost of each hour booked.
- **Register workers**: Badges and roles can be applied to each by agency staff.
- **Allow buyers to book workers**: Or agency staff can make bookings for their buyers.
- **Authorize timesheets**: This is required before export of data to agency's payroll system.

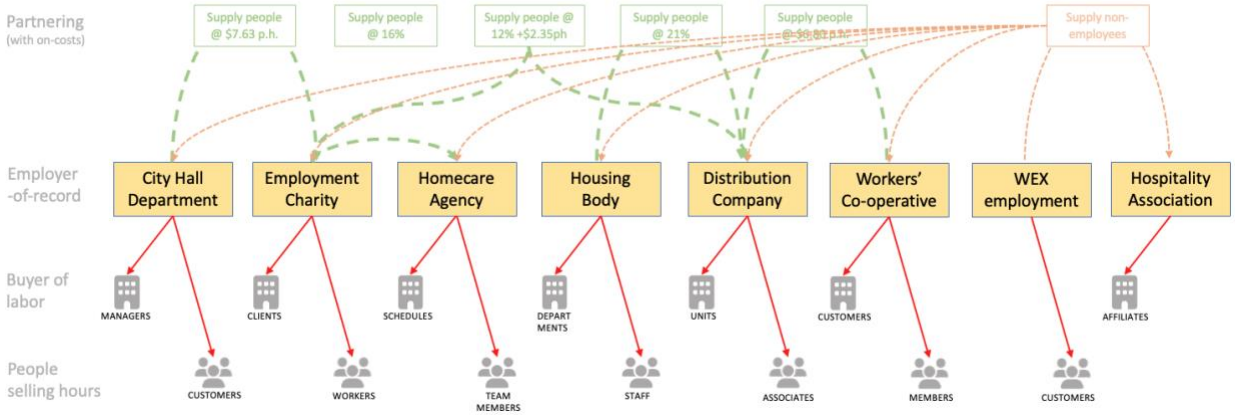
Broadly, think of the agency as Employer-of-Record for its workers, who work for its buyers. There can be many arrangements and display terms. Here's some examples (the yellow box shows the employer):

			
City Hall's Parks & Rec. dept. has a pool of staff, each badged as trained to work at different parks.	A non-profit staffing agency has work-seekers who are deployed by their client companies.	A for-profit homecare agency has schedules to fill from employees it calls Team Members.	A public housing body delivers care to its vulnerable residents with trained workers

As you set up these agencies, they will each be a silo of activity; if a resident wants to work for both Parks & Rec. and the non-profit staffing agency, they will need two separate relationships and two separate log-ins to GoodFlexi. That would be maddening. So, the system incentivizes **partnering** between agencies: Agency A allows its workers to be booked by Agency B's buyers in return for whatever charges are agreed between A and B. As these relationships form, an eco-system emerges:

[*] The codes are for the tax forms used to report income

[†] The term "Agency" is configurable within each agency so users will likely see different words describing this entity



a) Operational issues

Partnering creates multiple ways to shape a market that maximizes opportunity. Here's some:

- **Multiple partners**: This is shown in the above diagram. You have an array of agencies, each supplying at realistic rates to multiple partners. This is the ideal option: diverse agencies can have complementary specialisms (one focusing on hospitality work, another on the needs of people with disabilities, maybe one dedicated to getting work to people in a deprived part of the city, and so on). But there's huge amounts of work accessible for workers.
- **Non-employer gateway**: An organization can be set up as an agency with work-seekers but no buyers. It is not an employer but a gateway to many others. This is our model in Long Beach. WorkLB badges workers and then proposes them to participating employers. Drawback: workers must be onboarded by multiple employers before they can get work.
- **Backstop**: The gateway model (above) can get you going quickly, but you will likely hit a problem as small businesses want to book labor. It's not worth their while adding top-up staff who may only do a few hours, to payroll. You want to be able to offer them a turnkey employer-of-record, probably a staffing agency, that will onboard, say, corner stores as a client and provide workers.
- **1099's**: Some workers, typically higher-paid, welcome not having an employer. They are happy to work as a contractor for multiple clients, particularly if they already have their own limited company. The agency layer in GoodFlexi can be set to invisibility for these people.

The key consideration has to be: viability of business model for each agency. Will the market bring enough volume to merit the costs of on-boarding, paying, and overseeing workers? Your master launch model (→ 0C Launch modelling spreadsheet) will provide answers from your assumptions.

➲ Aim to start your market with at least one high-volume employer-of-record. Ensure their on-boarding process is as slick as possible. This will get work going through your platform quickly. Vetting can be progressive; workers approved for low-barrier work immediately with those that prove reliable then getting more valuable badges authorized.

APPENDIX 3: Market structures

Creating a contract, badge, or role takes under a minute in GoodFlexi. But it should be done carefully. There is a danger of leaving users lacking clarity and having to spool through an array of options. You want to shape a succinct, coherent, portfolio for users. Recommendation: start with the smallest number needed, then add new ones at predictable intervals, eg: the first Monday of each month.

a) Contracts

When an agency is registered on your platform, GoodFlexi will ask which contract you want to assign. (You can build a library of agency contracts.) When Agency creates the record for a buyer or worker, the same happens. You can offer default contracts for your agencies to offer buyers or workers if you wish.

Any agency that is already an employer-of-record will have its own employment and client contracts (or will have decided it doesn't need them, for example a public agency whose buyers are its departments is unlikely to have a formal supply agreement with each of them). Other agencies will want to handle contracts on paper. In these circumstances it's fine to upload a blanket pdf to GoodFlexi just saying "Contracting terms agreed offline".

Where a contract can be vital is where the agency is NOT the employer-of-record. That needs to be embedded in an agreement to protect the agency. You can see the WorkLB work-seeker terms here.

b) Badges

Badges can open doors to opportunity, tracking of workers who need support, monitoring of benchmarks, reporting on outcomes, and so on. (It may be a requirement of your funding that you track worker outcomes by ethnicity for example.) Here's the quick overview of GoodFlexi badging:

Your platform allows creation of unlimited badges. Each can be applied to any eligible worker by their agency, or by the agency that created the badge if they are a supply partner to the worker's agency. Badging workers has two core purposes:

- **Role eligibility**: A role (type of work) can be made conditional on the worker having the badges required. For example: to work as a Play Leader on the Long Beach Party Boats a worker must have badges "TB checked", "Livescan certificate" and "Willing to work at sea".)
- **Reporting**: Agency superusers can run reports specific to badges (eg: show me all my workers badged as "CSULB student" and show utilization and aggregated availability for that subset of workers.)

Each badge belongs to one of three categories:

- **Credentials**: Any certification held by the individual as a result of training. (eg: Has a van driving licence, is a certified Home Care Aide, has completed Walmart checkout operator training).

- **Tags**: Any verified fact about the worker that could make them additionally attractive to buyers or attract support or be useful in reporting their outcomes, but which they did not have to undergo training to achieve (eg: registered disabled, full time student, lone parent).
- **Self-approved**: What the person is or isn't willing to do. (eg: Work Outdoors, Work in noisy environments, Lift Loads up to 20lbs, "Will work on boats" was suggested in Long Beach.)

A badge must be created at one of three levels:

- **Standard**: Set up by Back Office superusers and available to all agencies in the system.
- **Agency level**: Set up by the agency and only available to its workers
- **Buyer level**: Specific to one buyer, set up by buyer's agency, the badge can ONLY be used as a requirement for roles specific to that buyer.

Hidden badges: Any badge can be hidden from buyers' view if deemed sensitive and marked "Public display: No" when it is created. (For example: "Formerly justice involved" might attract support and public sector work but should only be displayed to agency and the worker themselves.) Hidden badges are not displayed in worker profiles or the profiles of any roles which require that badge.

→ 9A Example badges 9B Sample local ladder of badges

➲ Arriving at a suite of badges can might require some shuttle diplomacy among parties. For example, a badge signifying "Willing to work with pets" is useful for buyers of childcare or senior care. A worker who is allergic to cats will likely want reassurance they will not get booked for houses full of them, meanwhile a work-seeker who adores animals should be able to monetize that attribute by being more attractive to households full of them. But is someone holding that badge happy to deal with Rottweilers? Or snakes? Or a monkey? Wording embedded in your badge can clarify, but everyone needs to agree on acceptable limits. You may want to get buy-in for a list of "normal" pets.

c) Roles

Again, a role can be specific to one agency, one buyer, or system-wide. It is in each agency's interests to keep roles general then create buyer-specific variants if needed. So, for example, "Childcare Support Worker" is a good catchall for people who have all the badging to do that work and the agency considers are broadly adaptable to the needs of a range of clients.

➲ If an agency has some broad agency-wide roles, they are ideal as "Top-up roles" to maximize options for buyers. So, a family might have a role "Childcare for Freddie" that is specific about their kid's needs. But by making "Childcare Support Worker" the top-up, family members will see those workers below their Freddie-specific pool when booking. It creates back up options and exposes them to more talent they can trial with Freddie.