Session 4: Participant Intake, Progress Tracking, and Reporting
Grantee Case Management Systems

October 20 at 3 PM ET
Speakers

✓ Mary Wright, Manager, Apprenticeship, Society for Human Resource Management (SHRM) Foundation
  Closing the Skills Gap Grant

✓ Shonda Atwater, Apprenticeship and Community Education Workforce Manager, Metropolitan Community College
  Closing the Skills Gap Grant

✓ Christine Gillespie, Executive Director, Continuing Education and Workforce Development, Bergen Community College
  Scaling Apprenticeship Grant

✓ Moderator: Patti Bartels, Scaling Apprenticeship TA coach
What challenges are you experiencing?

Let us know in the chat what challenges your grant project is experiencing in case management.
Participant Intake, Progress Tracking, and Reporting
SHRM Foundation was awarded a $972,000 CSG/DOL grant to create a HR Registered Apprentice program based on SHRMs curriculum for the SHRM-Certified Professional.

Our mission:
- Develop the “Gold Standard” for an HR apprenticeship
- Become a recognized leader in all-things apprenticeship for the HR field
- Enroll 800 apprentices by February 2024
- Meet all DOL requirements as a federal grantee
Operational Data Needs - Reporting

- Fulfill DOL requirements including data maintenance:
  - Collect the data elements as a csv file into a reporting portal on time and without errors - https://www.workforcegps.org/events/2020/06/08/13/50/Apprenticeships-Closing-the-Skills-Gap-Performance-Reporting-Orientation-2-0
  - Support data collection from least 100 separate employers (could be more) and 800 apprentices
  - Give employers/service providers the tools and training to supply the data needed to fulfill DOL requirements
    - Excel spreadsheet
    - Other tools
- These data will also be used for SHRMFs evaluation of the overall program as they include information on time in training, retention, demographics, etc.
What is a Data File?

• Grantees will upload a data file that includes **89** Participant Individual Record Layout (PIRL) data elements.

• PIRL data elements are the required pieces of information that must be reported for each participant served in the program.

• [https://www.dol.gov/agencies/eta/performance/reporting](https://www.dol.gov/agencies/eta/performance/reporting)

• The data file includes code values for each PIRL data element for each participant.

• There are two other forms that must be tracked: ETA-671 (registration) and ETA-9173 (demographics)
## Operational Data Needs – Evaluation

<table>
<thead>
<tr>
<th>Employers</th>
<th>Apprentices</th>
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<tr>
<td>Quality of the support from SHRMF in establishing and implementing the apprenticeship</td>
<td>Quality of the support from SHRMF during the apprenticeship</td>
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<td>Process of recruiting the apprentice</td>
<td>Quality of the Supervisor and Mentor</td>
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<td>Quality of the curriculum</td>
<td>Quality of Academic programming</td>
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<td>Performance of the apprentice</td>
<td>Overall rating of the apprenticeship program</td>
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<td>Overall rating of the apprenticeship program</td>
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Decision Rubric

- Budget
- Customer Feedback
- Familiarity w/DOL requirements
- TA availability
- Customization of reports
- Cost per apprentice
- Usefulness/applicability post-grant
- Integration with SHRM platforms

- Ease of Use
  - SHRM
  - Employers
- Data export capabilities
- Program maturity fit
- Additional Features
- Ability to handle volume
  - 800+ apprentices
  - Unknown number of employers
Questions?
HealthWorks

Christine M. Gillespie, Ed.D
Bergen Community College - Lead
Progress Tracking Metrics

IF YOU FEEL LIKE YOU ARE GOING IN CIRCLES - YOU ARE!

IT IS AN INTERATIVE PROCESS!

HPOG  WIOIA  H-1B APPRENTICESHIP
TAACCCT  TPSID  GAINS
Progress Tracking Metrics

- **FEDERAL**
  - WIPS
  - RAPIDS

- **STATE**
  - SAGE

- **LOCAL**
  - OASUS
  - County Apprenticeship Coordinator

- **INSITUTIONAL**
  - IPEDS

- **PRIVATE**
PARTICIPANT DATA - Connection to Reports

JotForm
- Initial Participant Data
- Mentor Assessments
- Attendance Reports
- Wage Data

Salesforce
- Main Database
  - Each partner has individual instance (not linked)
  - Template configured for each grant
  - Participants assigned and sorted by funding stream
  - All participant program information and progress tracked

Reports
- WIPS (PIRL)
- RAPIDS
- SAGE
- County WIOA
- County Apprenticeship
Monthly Mentor Report

All reports due by the 5th of the following month.

Apprentice Name

First Name  Last Name

Report Date

mm-dd-yyyy

Date

Apprentice Program


###テーブル - (11レコード)

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<th>Site/College</th>
<th>Last Name</th>
<th>First Name</th>
<th>Mailing State/Province</th>
<th>Birthdate</th>
<th>Gender</th>
<th>Disability Status</th>
<th>Ethnicity</th>
<th>Are you a Veteran?:</th>
<th>Currently Employed?</th>
<th>Long-term Unemployed (27wks)?</th>
<th>Highest Grade Completed</th>
<th>Highest Level of Education Achieved</th>
<th>Ex-offender Status</th>
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<td>OJL Start Date</td>
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Questions?
Metropolitan Community College

Making Apprenticeship WORK

APRENTICESHIP
Apprenticeship Department

Shonda Atwater
Apprenticeship Manager

Goldie Gildehaus
Apprenticeship Workforce Coordinator

Courtenay Wills
Apprenticeship Workforce Coordinator

Debi Rice
Apprenticeship Workforce Specialist
Win for Business!
Grow long-term talent with immediate results.

Win for Students!
Comprehensive program combining classroom and on-the-job training.

Win for the KC area!
Reduce the skills gap and help grow the economy.
Grant support + revenue generating tuition model = Long term sustainability

MCC Sponsored
(MCC as the Intermediary)
- MCC Partnered Articulated Agreements/Fast Track Degrees

Employer Sponsored
(MCC as RTI provider)

Union Sponsored

Federal DOL Apprenticeship

MO Dept. of Higher Ed. & Workforce Development
What is Apprenticeship?

- Employer Designed & Driven
- Structured On-The-Job Learning
- Job-Related Education
- Wage Progression
- Mentorship
- Valued Credentials
Standard Operating Procedure
Long Term, MASTERY-LEVEL Training!

Apprenticeship is the highest standard of work-based learning with an emphasis on rigor, mentorship, class-work and job training while earning an income. This creates opportunities for diversity, filling the skills gap and more.
Questions?
Some Things to Think About: Project Management

- Deliverables Tables/Timelines/Milestones
- Statutory and Regulatory Information
- Program Operations Manual
- Communications Plan
- Technical Assistance Opportunities
- Staff Development and Partner Training
- Participant Files
More Things to Think About: Data

- Issues, Challenges, Lessons Learned re:
  - Acquiring data from other entities (e.g., sub-awardees or contracted entities, etc.)

- Accessing wage records

- Workforce Integrated Performance System (WIPS), the web-based system grantees use to report quarterly
  - Accessing the site
  - Certifying a Quarterly Performance Report (QPR)
  - Submitting a Quarterly Narrative Report (QNR)
DOL Resources (WorkforceGPS)

- SMART TRAINING
  - https://grantsapplicationandmanagement.workforcegps.org/resources/2019/06/03/14/09/2019-Dallas-SMART-Training-PowerPoint-Presentations

- RISE
  - https://rise.articulate.com/share/4eRGrXGtljJRwOJ5_QgQiS_wR5rdo1wy#/lessons/TScwRBed2inW6QfwWDhj4SvqEAYa9vCv

- COLLECTION OF GRANTS MANAGEMENT TRAINING
  - https://grantsapplicationandmanagement.workforcegps.org/resources/2016/12/14/10/45/Grant-Management-Training

- GRANTEE HANDBOOK
Thank You!