**WorkforceGPS**

**Transcript of Webinar**

**H1-B Ready to Work**

**Data-Driven Decision Making: Tools to Review and Manage Performance**

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*Transcript by*

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BRIAN KEATING: (In progress) – case manager, job developer, or employment specialist. You might be an H-1B technical skills training or an H-1B jobs accelerator or, last but not least, you might be H-1B Make it in America. So the way to vote in the poll is to go ahead and click the radio button on your screen. It looks like most of you have done that. We'll give you a few more seconds in case you haven't already. Just click one of the radio buttons there that mirrors your response, and then we'll leave that up for a minute as you finish voting.

Meanwhile, I'm going to go ahead and introduce Ayreen Cadwallader. Ayreen is a workforce analyst with the Employment and Training Administration, Division of Strategic Investments. Ayreen, take it away.

AYREEN CADWALLADER: Great. Thank you so much, Brian, and welcome, everyone, for attending today's webinar on data-driven decision making. Performance reporting is certainly something that we are all really very excited about here at the national office, and we're certainly excited to hear from the speakers during today's call as well as those of you on the call who might have some questions or comments to add to our discussion today.

From the polling questions, it looks like the majority of you on the call are Ready to Work grantees, program directors, and managers. So really glad to have you here on board, but also excited to know that we have some authorized representatives, some IT staff, and also we did extend this invitation to our existing H-1B grantees.

So there may be some of you on the line from our TST, JA, and Make it in America grants. We really just wanted to send this your way as an opportunity for a performance reporting refresher on this topic. As you are nearing the end of your grant program, really want to emphasize the use of your performance data as a sustainability planning tool. Again, this is also – sustainability is a topic that we like to talk about from the start of the grant program, so really starting to drop in the seeds for the Ready to Work grantees.

I'll be introducing our presenters momentarily, but I do want to let you know, like I said, we have a full house here at DOL. Megan Baird, our program manager for the H-1B grants is on this call as well as Danielle Catrell (sp), who's one of our several colleagues for the H-1B team.

So next you'll hear from both Angel Harlins and Kevin Mauro, our H-1B technical assistance team, both from a programmatic and performance reporting standpoint. I'm sure you've heard from them in different capacities, but we're really excited for the two of them to lead today's presentation. And in addition, today's presenter we would like to feature Heather Henry from Anne Arundel Workforce Development Corporation, one of your Ready to Work colleagues with 12 years of workforce development experience to bring to our conversation today for sure.

So with that, just want to quickly go over our objectives today. Like I said, performance reporting is one of my personal favorites for grants management, and knowing that you are well on your way on your second year of your programs, we know that you're starting to serve participants and enroll participants in your training programs and also placing them into employment.

Today we are going to be able to see some of your performance data aggregate as a whole, and so what we want to do is we want to emphasize that performance really is not just about tracking your data and reporting your outcomes to DOL on a quarterly basis. And what we'd like to do is to encourage you to use your data in ways that can improve your grants.

During today's presentation we will provide you with some tools that you can use to track your quarterly outcomes and measure them against your annual or cumulative grant to date. You'll hear from Kevin Mauro on a performance data indicator tool as well as from Heather who will also talk about Anne Arundel's performance tool.

And then we really hope that we provide you with some ideas on how to use your data to impact your program design, your outreach and recruitment strategies for participant enrollment and partner engagement, and how performance, again, can be a great tool for sustainability planning. And with that I'll go ahead and turn it over to Angel who will get us started.

ANGEL HARLINS: Thanks, Ayreen, and good afternoon, everyone. So performance reporting is definitely an important part to managing your H-1B grant, and it's definitely a huge topic of interest. And we definitely appreciate all your hard work and your earnest efforts to ensure accurate reporting in a timely manner, from learning about the HUB system, how to upload your data files and generate a QPR form to understanding the aggregation rules that make up your QPR form and finally in making the final submission of your quarterly report.

So for today we're going to talk about how your performance data for your Ready to Work program and why we're using it. We will discuss how your performance data can inform a data-driven decision making process when managing your H-1B grant. To do so we've developed a process indicator to help you see your data in a way that is a bit more interactive than viewing your data files, spreadsheets, and QPR forms.

And then once again, Heather Henry will share how her Anne Arundel Workforce Development Corporation tracks performance outcomes through their MTC tool. And lastly, we'll go over some of our common performance reporting questions and provide you with an opportunity to ask performance questions.

So let's get started. As you know, performance reports are due each quarter and contain detailed information about your grant activities, including leveraging your resources, strategic partnership activities, timelines, grant outcomes, promising approaches, success stories, and technical assistance. All of this information is valuable. Tracking your performance and outcomes can help your organization sustain and grow your workforce development strategies.

From the national office perspective, performance data is used to illustrate your success. Your quarterly reports allow us to share your success with national and local stakeholders. This includes congress, DOL leadership, the Office of Management and Budget, the government accountability office, as well as the media and others in Washington, D.C., including local stakeholders across the nation. But it also allows you to illustrate your success to your own stakeholders, and we'll note that in the third bullet, which we will discuss in a few moments.

Secondly, knowing your performance data on a quarterly basis allows you to develop continuous improvement processes to ensure that you're meeting the need of your program participants and business partners. Your quarterly performance data is your checkpoint tool to let you know that you are on track of meeting your outcomes. This is a huge opportunity for you to analyze your program based on what the data is telling you, and we will talk about that in more detail a little bit later as well.

You can also use your performance data to promote your program to engage participants, employers, and other partners. Potential participants may be more willing to enroll in your training program if your performance data can guarantee success, training completions, and employment outcomes. Potential partners are more willing to join you if you can illustrate that your performance is effective and successful.

Next, tracking your performance outcomes helps to ensure sustainability of your grant program and evaluate the effectiveness of future grants. Having mechanisms in place to track and report your performance outcomes should be an integral point to your sustainability plan. If you can show through your performance data that the program is effective for the Ready to Work grant, you have the opportunity to replicate this program into other industries or new target populations for future projects.

In addition, as we all know, being able to show a history of successful past performance is always an added plus for future grant solicitation.

And lastly, your performance data helps us identify areas of opportunity. Discretionary grant programs allow flexibility for grantees to propose and implement innovative strategies for training and employment. Therefore, reporting successful outcomes will help all of us to identify effective programs that could be replicated and meet various needs in other parts of the country.

Performance reporting ensures program activities are not just effective but have the greatest impact and improves the lives of people across the country. Those who are unemployed and long-term unemployed, dislocated, or those in need of improving their skills up-skill their jobs. Just remember that great programs plus great data plus great outcomes equals greater opportunity for American workers.

Now that you know the importance of your performance from a national perspective, let's remember that your performance is not just about reporting to the DOL. We encourage you to view your performance data as the map to your glove box. Did you know that your performance data can inform grant management process? Your performance data is a map for grantees to access your H-1B program. Evaluating the effectiveness of your program by viewing your performance data is one method you can use to make important decisions that will achieve your program goals.

This evaluation process should be done at least on a quarterly basis, depending on what makes sense for your organization. This could be done before or after the last reporting quarter, at your quarterly stakeholders meetings, or during weekly team meetings. It should also involve all of your team members, not just executive level authorized representatives and program directors but other staff, including your case managers, your job developers, your business developers, and data analysts.

Your performance data is the tool to analyze the success of your training program. Grantees should closely examine your performance data to analyze the effectiveness of your program and draw more conclusions about your program's training design and delivery.

We ask grantees to provide annual target outcomes for several performance measures such as total participants served, being trained – begin training, completed training, and entered employment. As you measure your quarterly performance against your annual targets, you may want to ask yourself, are you where you thought you should be? We'll provide more examples later in this webinar to help you with your data analysis process.

And then lastly, reviewing your performance data on a quarterly basis is the key to achieving your performance goal. There is always a sign of relief when your performance data shows that you're on track to meeting your performance goals. But what happens when there are gaps in your performance from the last quarter's data? Are your performance goals attainable? Based on what you learn, you can take the opportunity to improve various aspects of your program before the end of your grant life cycle.

Remember it's OK to ask for directions. While you're reviewing your performance data with your team, it's important to ask these important questions. What should you already know? Who are you serving? What is your training design? What do you expect to achieve? Having a clear picture of your end goal and destination will help you manage your performance throughout the grant life cycle.

This leads us to our next question which focuses more on data. What are your target outcomes? These are the outcomes indicated in your grant proposal statement of work. In addition, are there goals not being reported to DOL? You could have internal goals that are measurable using your performance data that can be used to illustrate the success of your program.

What are your grant performance outcomes to date? Are you where you thought you should be? One of the reasons that we look at your performance is to measure it against your target numbers. This is mainly to identify opportunities for technical assistance. Are you conducting your own quarterly analysis? We encourage you to do the same. Compare your performance outcomes grant to date against your target outcomes to identify areas where you might need additional support.

And lastly, what else do you need to know? Your understanding of the H-1B performance reporting definition is integral to your assessment and evaluation process. What are the reporting definitions that can inform your analysis? And also keep in mind that the QPR aggregation rules are informed by specific data elements and the code values entered for each data element.

So how often do you review your performance data? And if you could, Brian, let's pull up the poll and see how people can respond to this question? Do you do it every day? Are you doing it every month; on a quarterly basis or annually?

MR. KEATING: Sure thing. And yep. We're bringing that up now. So, as you can see on your screen, we have those options for you to vote on. So again, we'd like to know do you review your performance data every day, every month, quarterly, or annually? And it looks like many of you have voted. If you haven't already done so, go ahead and click the radio button on your screen that best selects your choice. Give you another few seconds. Meanwhile, I'll turn it back to the team to comment on what you're seeing so far.

KEVIN MAURO: Thank you, and hello, everyone. This is Kevin. It looks like most of you are checking in on your performance data at least every month, and that looks good. Really the important thing is that you're aware of your performance data and that you're checking in in some way.

Some of you may already know that I handle performance reporting in the national office. So I've probably spoken with a lot of you already, but I wanted to take this opportunity to talk about performance reporting and how you'll be able to use this tool with your performance data to get some insights about the state of your grant and your progress throughout the grant's life cycle. So let's go over the performance progress check-point tool, and you may have noticed that this tool is available to download in the file share box right below the presentation.

This is an Excel spreadsheet that we've provided electronically to grantees. During this presentation we'll simply go over the key sections of the tool. We plan to have future opportunities during HUB office hours, if you'd like a screen share tutorial on how to use the progress check-point tool. This is intended to serve as a technical assistance tool for grantees to review and analyze their grant's project's progress and identify areas of technical assistance.

The tool is simply an Excel spreadsheet with four tabs. The first two tabs are the input and output spreadsheets. These are the areas you'll be most concerned with. The input spreadsheet is where you'll enter your performance data for the most current quarter, along with your target goals using the following measures, training progress, participant demographic breakdown, program completion and employment outcomes by employment status, either unemployed or employed workers.

Line 16 is measuring the number of long-term unemployed workers for those grantees that indicated target goals for serving this population. However – know, however, using column B you'll enter the cumulative grant to date results using data from your QPR form or from your own internal records. In column C you'll enter the training progress chart target outcomes as indicated in your grant's statement of work. Realize that some of these target outcomes may not have been provided to ETA. So the dark orange cells in column C are where you can enter target outcomes using your own internal target goals.

This is an overview of the output tab. The output tab provides three ways to view and analyze your data. Output one is the outcome progression chart. The chart on the far left-hand side shows the progression of your participants by comparing your performance to date against your target outcomes. The three columns show the number of participants that began training, completed training, and received a credential. The total participants served are represented in blue, while the number of participants needed to hit your target goals are represented in green.

In this sample taken from the cumulative data of all Ready to Work grantees, 12,186 participants are projected to begin training. There are 2,509 participants enrolled to date, and collectively grantees need to enroll 9,677 more participants before the end of the grant. Out of the 10,607 participants that are projected to complete the program, 867 participants have already completed. The last column on the left illustrates that 504 individuals who completed training also received a credential of the 7,657 projected to earn credentials.

The two remaining charts show employment outcomes for unemployed workers and employed workers. They also measure your employment outcomes by your target outcomes. In this sample out of 75 unemployed individuals that completed training, 70 individuals entered employment. And out of the 92 employed individuals that completed training, 52 individuals entered employment.

Output two is the process and program indicator table chart. The table in the middle is split into two sections. The light blue section includes two process indicators which are used to measure outcomes from the number of participants that complete training after starting training and obtained credential after completing training. The dark blue section includes four program indicators for the grant which are used to measure employment outcomes for employed and unemployed workers. Current ratio versus target ratio, for each of the indicators two ratios are provided.

The first is titled the current ratio, and it represents the percent of participants that have successfully moved from the first service listed to the second. For example, from starting training to completing training. The second is titled target ratio, and it represents the percent of participants who were targeted in the grant's statement of work or the grantee's internal records to successfully move from the first service listed to the second. Please see the output two table calculations tab to determine how the ratios were calculated in the indicator tables.

Because these grants are still operating, the data presented in the current ratio is likely to be lower than actually is the case. It takes some time for data to be collected and reported. An effort must be made to check the information for accuracy. It also takes participants time to move from one service point to the next. For example, training may take anywhere from a few days to several months, and it also takes participants who have completed training several weeks to find employment.

Output three, credential attainment, employment status, and other chart. The first of three pie charts at the bottom compares the percentage of participants who complete training both with and without receiving a credential. The second pie chart compares the number of participants served by the grant who are employed workers with those who are unemployed workers.

The third pie chart compares the number of long-term unemployed served by the grant to the grant's target goals. Grantees may use the third chart to measure demographic outcomes for other measures that are being tracked for internal grantee purposes, if you are not tracking LTU specifically.

The tool can be customized to the grantee's needs. All you need is an Excel expert guru. Take a look at tabs three and four to explain some of the definitions in the check-point tool and to show the formulas behind the table. And the formulas are literally behind these tables, if you're looking to make any changes or additions. So please look for them there.

At this point I'm going to pause and ask if anybody has any questions.

MR. KEATING: All right. Great. If you have any questions so far, go ahead and type them into the chat window on your screen. We'll see those come in, and we'd be happy to address them now or at any point through the rest of today's event. So feel free to type them right in as they occur to you. We'll see them come up, and then we'd be happy to, as we're doing now, to pause and address those questions. That being said, Kevin, not seeing anything coming in so far.

MR. MAURO: OK. All right. Now, to put this tool in our real world perspective, let's take a look at the aggregate program outcomes for our H-1B Ready to Work grants. We will walk you through the overall grant program's performance outcomes to date from the quarter ending 3/31/16 and talk about some of the key factors that the data is showing us. In most cases I will talk about these outcomes using percentage rates of where grantees are compared to their target outcomes.

H-1B Ready to Work grants projected approximately 12,186 participants to be enrolled in their H-1B training program. To date Ready to Work grantees have achieved 25 percent of their target goals for the number of participants that began training. It looks like you have about a 9 percent program completion rate compared to meeting the target outcomes. Credential outcomes are also shown here as measured against targets, but what is just as important to acknowledge is that Ready to Work grantees have a 58 percent credential attainment rate for all participants that complete their training program. So let's take a look at the timeline to illustrate the Ready to Work grant life cycle.

The Ready to Work grants have a period of performance from October 1st, 2014 to September 30th, 2018. Ready to Work grantees have completed 18 months of their four-year grant and are close to the mid-grant of their grant life cycle, which is during the quarter ending 9/30/2016.

As of the quarter ending March 31st, 2016, Ready to Work grants have served 5,233 participants, of which 4,760 are long-term unemployed and the remainder are other populations, short-term unemployed and incumbent workers. 2,509 participants began job training and educational services, of which 867 have completed training and 504 participants have obtained a credential or certification. Of the unemployed and long-term unemployed participants served, 1,120 participants have entered employment.

MS. HARLINS: Kevin, thanks for going through the indicator tool. All this information seems a bit overwhelming sometimes. What are some questions we can ask ourselves when we're looking at the outcome of our data?

MR. MAURO: That's a great question, Angel. Let's discuss the assessment pieces when reviewing our data. The four questions you want to ask yourself – and again, we went through that process when we looked at the outcomes for the Ready to Work grant, are what is happening with this data? What areas need improvement? How would you address these areas for improvement? And what have you done, or what will you do to resolve it?

So when you're making program decisions based on your performance data, these are some of the factors that could influence your program analysis.

Recruitment and enrollment. Do you need to expand your outreach and recruitment efforts to increase your program enrollments?

The length of training design. Is the length of your training design appropriate for the length of grant program? Will you still be able to capture credential outcomes if your training program includes credential attainment outcomes?

Program completion and credential attainment. Will participants be able to complete the program within the life of the grant?

Employment outcomes. Will you be able to effectively track employment outcomes for those participants that don't enroll in training and only receive supportive services or for those participants that enroll in training?

And beyond that, some of the external factors that could be influencing your data are challenges to obtaining employment in an evolving economy or market challenges in H-1B industries and occupations that could affect your program design.

So based on your unique needs, there could be several strategies you might use to change course. These are strategies that you can decide works best for you. You could make changes in the way you manage your grant program, which will involve your organization's leadership, program staff, and other stakeholders.

And as a result of making these changes to the way you manage your program, you want to see if there are ways to improve your systems and processes in your program design. The second piece is making changes to your statement of work. A modification to your statement of work takes careful consideration and should be discussed with your federal project officer, your FPO.

So here's just a little FAQ, some frequently asked questions about reporting your employment outcomes. The first is, how are unemployment outcomes reported to Ready to Work grants? Since most employment outcomes are based on program completion, the employment outcome you follow should be measured against the number of participants that complete training by the type of worker served. For instance, you would measure the success of your incumbent participants by looking at the number of incumbents who have advanced compared to the number of incumbents who have completed the program.

Another question we get is, can I report employment outcomes even if the participant has not yet completed the training program? And yes. Unique to the Ready to Work program, you are allowed to capture employment outcomes at any time, regardless of whether the participant has already completed the program or if they accept a job offer mid-way through the program.

And those are a couple of the questions that we've gotten. I want to give you an opportunity to again jump in and ask some questions of your own.

MR. KEATING: All right. Perfect. So again, definitely we want to hear from you. We've covered some of the common questions that we've gotten, but we also want to know what specific questions you have. So it looks like somebody is typing. Thank you to Elizabeth, and we know that you're with us. So feel free to join right in. All right. So definitely let us know what we can do to help you with that. We'd love to hear from you. So keep questions –

MS. CADWALLADER: So it looks like Elizabeth has a question that says, "Will we be able to obtain our local information in order to assess current outcomes?"

And Elizabeth, this is something I'd like to encourage you certainly information about your program from your local partners really is something that you should be tracking internally through your own management information system. What we have from our end is the performance data that you submit through your QPR forms, and Heather will be able to go through how they manage their data from their local partners. And that may give you a little bit of some ideas on how to manage your data form your local partners.

Are there any other questions?

MR. KEATING: All right.

MS. CADWALLADER: And that's a great point, Elizabeth. You've mentioned that you are currently tracking your local data information. However, you're not sure if it aligns with how the HUB is pulling the information, and that's perfectly OK.

Again, what we do is with the progress tool that Kevin presented now is really a high-level overview using the outcome measures that we use to analyze your grants for technical assistance purposes. You – again, you'll have an opportunity to view Heather's tool, which they've managed to change for their purposes, that goes into the level of detail that you may want to from a programmatic standpoint.

MR. KEATING: All right. Very good. Elizabeth says thank you. Thanks for the question, Jeannette (sp).

MS. CADWALLADER: And Laylana (sp) makes a great – oh, Jeannette made a great point. "We're reporting employment outcomes for all participants; right, not just those in training?" And you are correct. Employment outcomes do not need to be training related. Any participant that you serve through the Ready to Work grant program, if they only receive supportive services but enter employment, those are employment outcomes that you are able to report in the HUB system as soon as it occurs in that reporting quarter.

And if you have any follow-up questions, for sure – Laylani (ph), there's a question here of extending training providers. That's certainly a statement of work modification that you should discuss with your FPO.

And thanks for your comment, Nancy, on the feedback on the second – on the first part of our presentation. We can certainly transition now to Heather Henry to talk about Anne Arundel – how Anne Arundel Workforce Development manages their performance dashboard. Heather?

HEATHER HENRY: Hi. My name is Heather Henry. I am – if we could go back one slide, please.

MS. CADWALLADER: Oh, sure.

MS. HENRY: Actually, I think I can do that, can't I? There we go. Oh.

MS. CADWALLADER: Too fast. All right.

MS. HENRY: So Anne Arundel Workforce Development Corporation is the lead organization for the Maryland Tech Connection grant, and it is actually a consortium of 59 partners. So we have a very large region. We have 13 counties covered by our workforce services. So we have one, two, three, four, five, six, seven, eight – nine workforce boards that are part of it.

We also have kind of taken a dual approach to what we do. We work in the IT and the bioscience industry, and traditionally workforce hasn't done a lot in bioscience. So we had quite a good learning curve on what that looked like.

So we marry kind of the industry-led approach as well as the strong wrap-around services approach for jobseekers. We do have a boot camp that everybody goes through, and then from there it's highly individualized and includes things like occupational training. We do a lot of work and learn placements as well. So that kind of gives you an overview of where we're working from.

So some of this was said earlier, but from our perspective data analysis is extremely important. We really saw the importance of it and also being able to have a dashboard that showed analysis that we could share with everybody. So there are two main reasons why we do it internally, and the first one is really to allow us to know where we stand, these three reasons here. So where we are in relation to our deliverables, it really helps people to be able to see visually where they are in relation to their deliverables. And until we started doing that in earnest, a lot of people didn't realize how far off they were.

So that really gave them a visual that they can take a look at on a regular basis and see where they are. Also, because we do have different site locations throughout our region, it helps them and it helps us to be able to see how each site fits into the big picture. So without that data analysis we wouldn't be able to see that comparison or to see how they contribute to the whole.

And then finally, there was a question about how it relates to HUB. That's one of the things that we do a lot of work on, so taking a look at how it's reported out. Is what people are reporting to us matching what's coming out in the DOL extract? And we've had to do a lot of kind of reworking and recoding in order to make sure that what we're trying to get across is matching what's in the DOL extract. And without that data analysis we wouldn't be able to identify those gaps.

The other reason that data analysis is important for us is that it helps us to inform our successes and our areas of improvement. So it helps us to identify what's working well in different areas. Say one area really has some strong enrollment numbers. What are they doing that's making that successful, and can the other sites and other locations be able to utilize that? It also helps us to identify the indicators that lead to success.

So if a certain percentage of participants are doing this one activity and it's getting them either a faster or higher rate of employment, then that's something we should do across the board. It also identifies where the gaps are in services, where we're falling short so that we can be proactive in addressing those.

And then it predicts areas that need more support. So where is it that we need to take a more regional approach in supporting the sites versus what sites are able to do with the network that they have themselves? So those are some of the things that this data analysis approach has really allowed us to be able to do.

So as we started developing our approach to data analysis, we looked at what data elements we thought that we needed to focus on in order to be able to determine the elements of success. Obviously, the first one was DOL deliverables, our goal versus actual, and we do our data in a lot of different ways. So one chart you have here is our grant to date goal versus actual, and so every month we take a look at where we are planned for that quarter and where we are within that quarter.

So we do kind of a grant to date goal versus actual and what we call DOL year grant to actual, and then we also look at site comparisons, which you'll be able to see on our dashboard. How is each site doing on each of the deliverables? And then another thing that we started doing that people have really enjoyed, which you'll see on a later slide, is, what's the trend? So each quarter what's the trend for enrollments? Is it going up? Is it starting to go down? Do we need to take a look at that?

One of the things that we hope to see as we move forward is is it seasonal. Do we need to make sure that January through March we're anticipating a lower enrollment because there tends to be a lot of snow? So those are the types of things that kind of a trend analysis is helping us to identify.

Another thing that we decided that we wanted to focus on is that our grant focuses on training and supportive services. So we wanted to be able to focus our data analysis on training and supportive services. So we do an analysis about what types of trainings are people really getting involved in.

One of the things we realized with CISSP, as we start having more people take that certification, we need to make sure that we're prepping people effectively for that because there are a couple of key things that people need to do in order to be eligible for that. So as certain trainings start becoming more prevalent, then we can address it and make sure that we're preparing them for success effectively.

Another thing, since we are lucky to have been chosen as a random control assignment location, our incoming participant flow or our recruitment is really important to us. So we take a look at kind of our funnel of participants coming in, how many are coming to information sessions, how many are assessed, how many are randomized, and then how many are enrolled from that? And that helps us to be able to anticipate what we need to do for them.

And then the last data element that we decided to really focus on is the programmatic piece to the budget piece because they are inextricably tied. So we want to make sure that we are not just looking at our programmatic numbers, but we're also looking at our budget numbers. So those are kind of the data elements as we started developing what our analysis was going to look like and what our dashboard was going to look like that we wanted to make sure that we took into consideration.

So we use all of these different pieces of data analysis in a couple of different ways. We use it in monthly reports from sites. So we created some guidelines for our different sites as to what we wanted them to be able to report to us monthly, and then we compile that and review it with what gets put into our database.

So we now started doing what we call a monthly discrepancy report. You said that you are training 16 people, but in our database, which gets – which DOL pulls from, it's only 10 people. So you have the next 45 days to be able to fix that so it's ready for the extract. So that's one of the things that we use the monthly reports for a lot.

And then we take all of those pieces, and we do an MT – a grant outcomes by site with analysis. We do do a monthly call across all of the sites, and one of the standing agenda items for that call is to review the data and to see where we are. So we do use odometers for a grant to actual, which you see on the top there, where we're supposed to be at each quarter. And then we also do a site comparison of how many, for example up here, is enrolled at our different sites this quarter or this year. And then that allows us to be able to see who's being successful, who needs a little more support, and then we can address that, as appropriate.

And then every quarter we go a little further, and we pull together our quarterly dashboard. And it's a summary of all of this information, and that piece is what's really communicated to our stakeholders. That's the piece that's communicated to the different WIB directors, for example, the different training providers so that they can see those different pieces. And then one of the things that I do want to add is that what we're starting to do is either bi-annually or annually pulling together kind of a successes report that pulls from this dashboard. So that's kind of our next step.

One of the things that we realized in looking at this stuff is that visuals are key. I don't know how many tables I've looked at where my eyes have gotten crossed. I'm like, I don't know which one relates to which. So we really use charts more than tables, and we also use different types of visual means in order to show the data because some people really like this odometer. Some people look at the odometer and get confused by it. So we try and present the data in a couple of different ways to be able to appeal to different types of learning styles or personalities.

So here is the dashboard that we do quarterly. We have four different sections that we put on there. One is the DOL grant goals odometer, and we do this for each year. So this is our year two through March. So we have each of our grant deliverables and kind of where we are on the odometer for that.

We then have a section for the site comparisons for a couple of key deliverables, and we actually have receiving supportive services on there even though it's not a DOL grant goal because that's something that's important to us. And then we have the key training and supportive services delivered so that people can see kind of what the key pieces are, and then we have our incoming participant flow.

So those are the four different elements of the quarterly dashboard that we do. So we're going to take a look at the tool live.

MR. KEATING: All right. Great. And while you bring that up, Heather, I do want to remind folks that you have a couple of options at the top right-hand corner of what Heather is sharing. So you've got a full screen button just like with the slides. Also right next to that at the top right-hand corner of what we're sharing here there's a zoom in button. So looks like you're making it a little bit larger. Thanks, Heather. Feel free to zoom in, folks, if you want to get a better view of what we're sharing today, and we're also recording. You'll be able to revisit this in the recording. That recording will be posted in about two business days. All right. Heather, back to you.

MS. HENRY: OK. So this first tab is the actual dashboard that we PDF and that we print for people. Again, this top section is the odometer, the number that we have versus the goal for the entire year, and then the way that we address it is that each quarter should be in a different color, so we should have been further along in a number of these deliverables.

So then we go through the site comparison, and then each site can see kind of where they are in relation to the total amount. And it also gives an opportunity to say, OK, Baltimore County is really good at getting people enrolled and Montgomery-Frederick is really good at getting people enrolled in training. And it helps us to kind of identify where those best practices are. And then down here we have our top trainings and our top supportive services that are utilized. So this is something that I just enter in, these two boxes. All of the rest of the stuff gets pulled from these other two tabs.

So it did take me a while to figure out how to do the odometers. We do have this as a document that you can download and you can modify it, as you see. The gauges, for example, and the ranges, I don't even touch those when I put in the new information. The only thing that I do, I put in the goal at the beginning of the year, and then the only thing that I change as I go in and I update the information is I change what that attained is. Everything else is a formula that I don't even have to touch, and that's for each of the main deliverables. They are all here on this tab.

And then for the site charts, this section right here is all I fill in, and then everything else is automatically entered based off of this information. So we've got all of the site data that then gets broken into the different charts, and the outreach numbers gets broken into the flow chart. So this is something that you can download, and you can feel free to use the formulas and enter the data as you see appropriate. And it's something that you can use in combination with the tool that was provided or pull out the pieces of it that you like. So it's something that you can feel free to use yourself, if it's something that is appealing.

So we're going to go back to the PowerPoint at this point. Beautiful. So I'm going to do one more thing and tell you about what we do with it, and then I'm happy to answer any questions that you guys might have about these different pieces.

MR. KEATING: So what we do with this, number one, is we improve our data entry, and I really loved that question about matching it with HUB because I feel like every month that is one of the prime things that I do, is make sure that the data that's being reported to us is what's coming out in the DOL extract.

So we have made a number of coding changes as we start seeing more and more data, like saying our monthly numbers tell us that we have – I don't know – 50 people that have attained a certification but it's only showing 40. And then we realize going into the database that people didn't mark that they completed the training. So therefore, that certification is not coming up. So having that kind of data analysis and being able to connect it back to what is going into the extract has allowed us to catch some of those pieces.

We also use it in order to improve our services. One of the things that my staff has begun to groan about whenever I say is, so I did some data analysis and, dot, dot, dot. But it has really helped us to be able to continuously improve what we do. We use it in our outreach. We use it not only in our outreach to businesses but also to our jobseekers. By doing this kind of data analysis, we can go to businesses and say, this is not your traditional workforce grant; 67 percent of the people that we have coming into our program have bachelor's degrees.

And it helps to kind of break down the stigma with businesses as to the types of individuals that we're working with. For our jobseekers we went through and identified the key things that we thought were important to bring people in, and then we found some data points that could connect to that.

So we had realized that 44 percent of the people that go into training are in the training with a business or that 71 percent of the people that come into the program receive some kind of financial assistance. And those are really, really cool indicators which brings jobseekers in and catches their attention. So it's allowed us to be able to really promote our program to both businesses and jobseekers.

It also has allowed us to focus our regional efforts on training. This chart here is the trends that I was talking about, and in that quarter one we realized our training is not where we need it to be. So we focused our regional efforts on training. As you can see, in the last quarter that training started going up, and its going up even more in this next quarter. So we started saying, OK. Training is a key indicator. Everybody needs to make sure that they're taking a close look at everyone and what training needs they might have.

We also use it to develop a formalized certification study group. We've had a lot of difficulties with people getting credentials. People are finishing their training, but they're not getting their credentials. So by looking at that data analysis, we've created some formalized study groups. We've changed our pre-training expectations to say, if you're going to take a training, the expectation is you're taking a certification within 30 days. We've told people that they have to get their certification before they move on to another training. So we've changed a couple of different things in our approach in order to be able to improve that.

And then the last piece is, again, connecting it back to the budget. So it allows us to be able to project our spending better. If this is what we're spending on training right now, we're going to need to increase our training in order to meet our budget target, or we're going to have to do a modification in order to be able to rearrange those funds. So those are the types of things that we do with our data.

Our next step is going to be to take a look at some – kind of like a flow analysis to see if we can really pinpoint the successes for people, and then that's kind of how we utilize that data point.

OK. I'm going to turn it back to – oh, any questions?

MS. CADWALLADER: So we can certainly take on additional questions here for Heather. Please feel free to enter your questions in the chat window. Is anyone particularly excited about the tool that Heather created for their grant, as well as their grant partners?

We're particularly excited to see that the tool that Heather created is really a checks-and-balances tool that they can use as part of their quarterly performance reporting process when submitted to the Department of Labor. Certainly, this would not be the last time that we can address this topic. We can certainly follow up, if you would like to do one-on-one or a smaller group call with Heather to discuss this topic. We could certainly make that opportunity available too.

Yeah. Sounds like Denver would like to discuss in more detail. So yes.

Any other comments or questions? All right. Well, we're getting towards the top of our hour. So let's go ahead and continue with the last remaining slides. There are some questions that are being typed in, and we will try and tackle those as we get to the end. Let me go ahead and turn it over to Kevin.

MR. MAURO: Sure. I was just going to ask if anybody needs performance reporting technical assistance, make sure to check off these key items before contacting the HUB help desk. Here's five steps that you can refer to first to help troubleshoot your errors. We ask that you first review the reporting definitions in the performance reporting handbook, data elements, and edit checks and aggregation rules. Next, assess the issue. So is this a HUB system technical error, which has been known to happen, or a grantee user error?

MS. CADWALLADER: Sorry. We laugh. We do acknowledge that, yes. We do have HUB system errors and issues that we try to quickly resolve from our end, and we do appreciate – again, you hear from Kevin all the time, but hope – we emphasize, both Megan and I from our end, that we appreciate your flexibility and patience with us when we do experience those errors.

MR. MAURO: Next, check the formatting of your data file. Is there an apostrophe in column B-I to indicate that your data file ends in this column? Do you have participant names, data element names and numbers in your data file? You shouldn't. These two common errors will result in an error report.

Next, are you affording the right code value? You may need to reconsider if you should enter another code such as a zero for other or three for information not yet available instead of entering a blank response. Then go over the data elements and S check rules to determine the logic behind your data file errors.

In some instances, a data element requires that other conditions are met in order for that data element to be answered with the appropriate code value. Lastly, to resolve QPR discrepancies, closely review aggregation rules to determine how your data files are informing your QPR form.

MS. HARLINS: OK. Thank you, Kevin. So on our next page we have here our H-1B Ready to Work performance reporting handbook. And this is specifically for Ready to Work grantees, and you can download it on our WorkforceGPS site. It gives you more in-depth information about reporting.

And also you can also check out some of our webinars, an introduction to our quarterly performance reporting in HUB. And if you haven't, let's get ahold of our LinkedIn platform there. You'll be able to post questions and also make comments on our LinkedIn platform. And if you haven't signed up for our WorkforceGPS community of practice, please do so. And then what's coming up next is our H-1B Ready to Work long-term unemployed subject matter expert series: refining business development and employer engagement strategies, which is going to be on July 21st at 2:00 p.m.

As you know, you can always mail – e-mail the Ready to Work grantee mailbox with any of your questions or concern, and also reach out to your federal project officer and DOL office and technical assistance providers.

So before you go let's just take a few moments to – if you could, take a few moments to provide us some feedback using our feedback tool. The input you provide us will help us to better deliver future webinars and also create some technical assistance meaningful for your work. And thank you all for coming out and participating at the data-driven decision making tools to review and manage your performance webinar.

MS. CADWALLADER: OK. And thank you so much to both Angel and Kevin, as well as Heather Henry from Anne Arundel Workforce for today's exciting topic. Really hoping that this was something that could really be useful and beneficial to your grant program.

We'd love to hear from you. Please vote on these polling questions that we have up here, and certainly we could follow up with additional technical assistance on this topic in a small group setting. It looked like a few of you had asked specifically to be included in that. And again, our technical assistance is an ongoing process, and we want to improve them as much as possible.

So please let us know your feedback, and let us know your TA needs.

(END)