**WorkforceGPS**

**Transcript of Webinar**

**Innovative Recruitment and Job Training Strategies**

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JON VEHLOW: Without further ado, I'd like to turn things over to our moderator today, Monica A. Evans, workforce analyst, H-1B grant, ETA, Division of Strategic Investments. Monica?

MONICA A. EVANS: Thanks, Jon. Good morning or good afternoon, Strengthening Working Families initiative grantees. Welcome to today's webinar, Innovative Recruitment Strategies: Tools for Your Recruitment Toolbox. My name is Monica A. Evans and I am the SWFI program lead. I am joined here in the national office by my colleague, Danielle Kittrell, from the Division of Strategic Investments and the Employment and Training Administration.

Presenting today are Daniel Friend and Lily Roberts from Mathematica Policy Research. Mathematica is the technical assistance provider for SWFI. Now I will turn things over to Lily to get us started. Lily?

LILY ROBERTS: So we hope to use today's time to create an opportunity for SWFI grantees to learn more about effective recruitment strategies from our recruitment expert, Dan Friend. Today's webinar is part of a larger focus this month on recruitment.

So last week you received an e-mail from the SWFI team mailbox that included a worksheet to help you think through your recruitment challenges and strategies with your SWFI team and your TA coach. Later this month, you'll meet with other grantees to discuss common challenges and helpful approaches.

But while we'll have several more opportunities to discuss recruitment, as we go through our presentation today please don't hesitate to ask questions. We want to provide you with multiple opportunities to discuss lessons learned and ask for feedback this month. So we hope you'll use the chat function on your screen if anything sparks a question.

Throughout and at the end of today's call, Dan will field some of these questions. Dan is a senior researcher at Mathematica, and he's been recruiting participants to programs and evaluations for over 15 years. He's recruited participants in a wide range of areas including family support, behavioral health, and clinical trials. Most recently, Dan provided recruitment training and technical assistance to 40 grantees that are providing family support services under Federal grants and conducting their own evaluations of those services. Now over to Dan.

DAN FRIEND: Thanks, Lily, for the introduction and thank you all for joining me today. I'm very excited to talk with you a little bit about effective recruitment techniques. So just quickly go over the agenda for today. Today I'm really going to try to give you some tools and provide you with some next steps to really elevate your recruitment strategies, take you to the next level, and hopefully introduce your enrollments.

So in order to do that, I'm going to cover two topics today. The first is going to be recruitment tools. I'm going to talk to you about active and passive recruitment tools, tell you about the difference, and then talk to you about some general just recruitment tool guidelines that I think are good. And then I'm going to spend the remainder of the time focusing on developing and maintaining your partnerships and specifically developing recruitment partnerships with people. And I'm going to talk about formal and informal partners.

I know you all have formal partners that are helping you implement your SWFI grants, but I want you to think more globally about partners and think more about what I like to call informal community-based referral sources. They're partners that you're not providing services. You probably don't have a contract or MOU with them. But I want you to think globally as we go into there and we'll talk more about that. And then I'll come back with some concrete next steps and then we'll field questions. And as Lily mentioned, we want this to be an interactive presentation.

So as you go along, feel free to type questions in the chat window. We're also going to have some polling questions for you. And then we'll go through a really good Q&A at the end. But feel free to type them as you got them.

I want to start this off and I want to acknowledge something: Recruitment is hard. It's tough. It is the first problem that you will likely encounter when you get out of the gate with your program. You've spent all this time developing a great program. You've hired all your staff. You train them. And then you go to get people and bam – it's hard. It really is.

So I want to just normalize it. You are in a boat with a lot of people that have struggled with recruitment or run into challenges with recruitment. And it can take my forms. You can start off and you can have a really hard to reach population. People that are low-income or unstably housed notoriously hard to reach. There are whole conferences devoted to figuring out how to reach them effectively.

Alternatively, you could be going along fine just clipping through getting your enrollment targets and then something changes. There could be a shift in local policy or funding for your partners and your recruitment sources dry up or maybe change in organizational leadership with your partners so that your program isn't the focus anymore. They've got to focus on other things. Staff turnover – you might have staff that leave for other opportunities. How are you going to recruit with those limited resources?

These are all things that you've probably either thought about or many of you have probably actually run into. But they're really common. They're hard to address. But what I want you to take away is that we will give you some concrete strategies today to deal with these challenges. And just to reiterate something that Lily said, your SWFI team shared a recent list of questions to help you think through the challenges. So if you haven't gone over that with your TA coach and thought through some of your challenges, you will shortly.

There's one thing I want you to take away from this today. So write this down right now. This is what I want you to remember is that that in order to deal with all the challenges I just covered, you have to be one, creative. You have to. You have to lean on the people in your organization that are creative or innovative. It takes a lot of creativity and marketing skill to think about how you're going to reach your target population, where they're at. How are we going to engage them? What marketing messages are we going to say?

I'm going to talk to you a little bit about tailoring those messages, and there's a fair bit of creativity. There's also creativity in terms of engaging your partners and nurturing your partnerships. You've got to embrace creativity. And if you're not good at it, find the person on your staff that is. I guarantee you every one of you has a good, creative person on your staff.

You also have to be flexible. You cannot be rigid in your application of your recruitment strategies. If something doesn't work, you either have to change it or get rid of it. And to help you along with that, you also need a diversity of recruitment strategies. You've got to have lots of tools in your toolbox. They're going to help you be flexible. If something's not working, let's try something else.

I guarantee you if you remember those three traits, you will successfully combat all of your recruitment challenges that you encounter. So let's dive right in. I want to start off with recruitment tools. I mentioned a little bit ago I'm going to cover active and passive techniques and we're going to start with active. So everything listed on this slide is an active recruitment technique. So what does that mean?

This basically means human interaction where you have someone that is meeting your potential participant and delivering their recruitment messages. And that can take several forms that I'll go into right now. So the first is what I like to call direct outreach. That's where your staff – the people that you employ or volunteers at your organization – are going into the community figuring out where your potential participants are at and interacting with them in that environment.

So let's go back to, I mentioned informal partners at the very beginning. Let me give you an example of this. A school is a really good example of someone that might be an informal partner. They're definitely not providing services necessarily, but they definitely have events. They probably have a population that you're interested in. You're going to find them there.

You could go to these school events – maybe a PTA meeting, homecoming, a spaghetti dinner, fundraisers, whatever they're having – liaise with that school before – and I'll tell you how to do that when we talk about partners – and then go there and meet with participants. Go up to them and you're going to deliver the recruitment messages. You're going to tell them what participation involves. You're going to talk to them about the goals.

Most importantly, if you can, you're going to enroll them on site. This is really important because you can get the hook in them and then you have to reel them in right away. The more links you put between your participants and enrollment is all potential for you to have attrition, meaning that they won't sign up. So if I'm talking to them, I'm building a relationship with them. I'm hearing what they're needs. I'm hearing what their concerns are. I'm addressing those. I'm telling them about the benefit. They can see my passion. Hopefully, they trust me in the end.

These are also the advantages of this direct outreach. The end goal, though, is to get them enrolled. So I can do all that great relationship building and if I can't get them enrolled on spot, I have to rely on them to remember this interaction another time. So the more that you can do to get them enrolled right there the better.

On top of that for direct recruitment, you need to bring everything you need to conduct that in that environment. So I need to bring flyers. I need to bring brochures. I need to bring maybe something to draw them in. I call it swag. You might have stuff lying around your office or pens, pencils, pads of paper. I do anything for candy, right? So put those things in there to draw them in. Again, talk with your FPO, too, about what's allowable. And think creatively, going back to our creativeness. Think creatively about what can draw your participants in. But bring that along with your program materials.

And bring the means to enroll them or contact them later. And that means that if you have paper enrollment, bring the stuff that they need to fill out. If you have online enrollment, bring your iPad, your iPhone so they can do that. At the very least, bring something to write down their contact information so you can contact them later.

The next one is partner referrals. This is the exact same as direct outreach, only you're not doing it. You're relying on your partner staff to deliver the recruitment messages for you. So let me give you an example: You might have one of your SWFI partners that's helping you implement your grant. But that organization might have another program that helps sign people up for social services. So you want to integrate with that program in some way to have those people refer that other program population to you so that whoever is working with this other program will meet with their participants – hopefully daily – and say, hey. Have I got a program for you.

And they're going to do the exact same thing that you did for direct outreach. They're going to tell them about the program. They're going to walk through what it means to participate. They're going to walk through the goals and the benefits. And hopefully, they're going to sign them up on site. So your partners need everything that you would bring to direct outreach event. They need flyers. They need brochures. They need ways to enroll participants. So either they need application material or they need the URLs of the enrollment site.

Alternatively, if that's not possible, you've got to think through how you're going to get the referral over to you. So a lot of places I know have sent the contact a release of that information. Talk to your partners. Talk to your FPOs about what's possible and what's feasible there. But the whole thing is to make sure that you're getting the referrals and making it easy. We want to minimize the time between hearing the recruitment messages and enrollment whenever possible. And this is one example that's pretty easy of a reach.

The next fact of recruitment strategy is word-of-mouth. This is where you are leveraging your staff, your partners, your program participants to talk to their friends, their family, their coworkers into participating. This is usually most effective with program participants because they are the living embodiment of what you hope to do. They're going to know what participation means. They're going to be able to talk knowledgeably about what they did in the program. They're going to be able to talk about how they benefited. They're going to be the change that you hope to make. They will be convincing to other people.

So in order to do this, you have to think through this a little bit. How do you incentivize people to recruit for you? Well, there's a couple ways that you can do that. Again, you've got to lean on your creative people for that and work within the confines of your grant. So make sure you're talking to your FPO about this. But there's a lot of different ways. You could hold contests. I've seen people that – again, in those swag bags or candy – I'll do anything for candy – for the people that refer the most people gets this candy or whatever it is you're doing. Think creatively about how to incentivize those people.

Additionally, you have to give them the tools to refer people back to you. So what does that mean? You probably don't want participants enrolling their referrals. That just doesn't work out and it's a lot to ask of people. But you've got to give them ways to bring those referrals back to you. So they're going to need your business cards, your other kind of forms to refer family and friends into you. So you've got to think about that mechanism.

The one disadvantage to the word-of-mouth referrals is that there's a lot more steps. We're putting another link in that recruitment chain where we could lose people. Unfortunately, that's not avoidable here which makes the other two methods preferable. But think through how you're going to get from your participant word-of-mouth to actually contacting who they refer to you.

So I want to touch on direct outreach again and talk about who should do the recruiting. So when we think about it, we are going into the environment where the participants are and we're talking to them and delivering our recruitment messages. That's a very different skill set than probably most of your staff is used to. We're not providing services. We're not doing case management. We're not doing barrier reduction. We're marketing. That's the big difference and that's hard for people.

I'll tell you it was hard for me to learn. I'm in psychology and public health. It was very hard for me to learn how to market and sell my programs. But you learn it. You also have to identify who's naturally good at that. Who's naturally good at the sales pitch? Furthermore, who's naturally outgoing? That shy person that's probably really good at their job, probably not the best person to send out for your direct recruitment. Not that they can't grow into the role, but you probably need to provide more structure for them to do so.

You also need somebody that's tenacious. Not only do they need to establish a relationship with people and be outgoing, they need to turn a no into a yes or refusal conversion. People's natural inclination is to say no. When you are doing your outreach, you will definitely get more no's than yes's. So one thing that a recruiter is good at is turning that no into a yes. If you stopped at every no you got, you would not recruit anyone. So a good recruiter hears no, asks why or how come you feel that way, and then addresses those situations to convert them into a yes. And that kind of tenacity it's hard. It's uncomfortable for a lot of people. So you guys try to find people that are comfortable with it.

Additionally, a recruiter needs strong knowledge of the community and connections to the community. Going back to our informal partners and our direct outreach strategy, we've got to know where to find people. What are the good schools that might be holding events? Oh, I know that there's a community art walk or maybe a street fair. We should maybe go there, right? You've got to have people that know what's going on where you're trying to recruit from.

And one of the most important things is they need to resemble your population. If you're trying to recruit women, you should have a female recruiter. If you're trying to recruit Hispanics or Latino, you should have a Hispanic or Latino recruiter. It just engenders trust and makes people aware that your organization is sensitive to those cultural issues as well.

All right. So let's move on to some polling questions. So the first one is why don't you guys all tell me how your SWFI programs recruit participants.

All right. Let's move on to the next question here. So think about how could your SWFI program encourage current participants to talk about their program with friends, family members, and others. You can just type your answers in the chat box there. And while you're typing in your questions or your answers right now, just let you know that the recording and transcript and executive summary will be available on Workforce GPS in about two business days.

Great. So we got some responses there. This is something to think about if you have questions about how you might do this. We can always answer this at the end. One question we did get is from a grantee that asked: What kind of deal can we anticipate from different kinds of recruiting efforts; for example, what percentage of people who attended information session typically enroll in a program? What about the percentage that hear through word-of-mouth and typically flyers?

So my answer for that is, depends. But I will give you a good rule of thumb: Active recruitment strategy always do the best hands down. And I'll talk about why that is in a little bit. But I have listed the strategies in order of effectiveness. Direct outreach is always the best because you control the staff. You establish the relationship. Your staff know the ins and outs of the program and can sell it the best. Then followed by referrals, word-of-mouth, and then we'll talk about the passive techniques at the end. But those are in order of deals right there.

Now, the yield of how well your recruitment does depends on the quality of your recruiter and the quality of your recruitment messages. So we just talked about some qualities that recruiters have. We'll get into right now we'll talk about some of your recruitment messages and later we'll also talk about tailoring of your recruitment messages. That's really crucial. If you're delivering bad recruitment messages, nothing you do will yield anything. So again, thinking back to that creativity and that flexibility, we have to remember that those things influence the success of our recruitment techniques.

So we'll move on here. And we'll talk about the elevator speech. So an elevator speech – you've probably heard this when you are looking for a job to quickly and briefly list your skills or interests in a 60-second sound-bite. The same thing is here. You need to describe your program in that same amount of time. You need to give somebody the key takeaways and the key goals in about 30 to 60 seconds. So why is that?

Well, you've got to have a hook, especially if you're doing direct outreach. You are going to encounter people that are busy or probably don't want to hear you. They're used to them asking them to sign petitions or save the children, whatever happens whenever you encounter the normal street marketers. But that's not what you're doing. So you've got to give them a hook. You've got to give them something that's quick and brief that grabs their attention that pulls them in for them to ask more questions to explain your program more.

And you may have a really complicated program. You might need to do some work to really distill those points down. But it has to be quick. You have to have it be attention grabbing enough that they want to come in. So let's actually look at one right now. So we developed a little elevator speech I'll read aloud now. And then we'll break apart what's good about it and maybe what we can improve.

So we know that sometimes not having good, reliable child care is what keeps parents from training and getting the job they want. The SWFI program trains parents in manufacturing and technology while connecting them with high-quality child care during their training. We're hoping to help parents that have a high school degree get on track for careers and fields that offer stable, high-paying jobs.

So this is a good elevator speech. Why? OK. Well, it's short. It gets the main points across. And what were those main points? Well, we know who they're looking for. I am looking for parents with a high school degree. That means that if I don't have children or I don't have a high school degree, I'm probably not eligible.

But that's a good point to get across to people. You don't want to waste your time trying to enroll someone that isn't eligible. What else does it do? Well, it tells me what you're offering. You're offering training. Simple. It also tells me what the end goal is – to get me that better, high-paying job. So I've got some ideas about what I have to do and what my benefits are.

The strongest point of this elevator speech, though, is the very first sentence: We know that sometimes not having good, reliable child care is what keeps parents from training. That is something – it's like a foot-in-the-door approach. We all have issues with child care. Everybody knows that finding child care is hard no matter what you do. And it's especially hard when we think about jobs and careers. So it's a really good common hook that connects people and it allows them to get drawn in and will tell you more eventually.

So what could we change about this? All right. Well, one sentence in particular sticks out to me. I'll read it out loud: The SWFI program trains parents in manufacturing and technology while connecting them with high-quality child care during their training. All of this is true. It's very true. But going back to what I said before, the effectiveness and the yield from your recruitment strategies is dependent on the quality of this messaging. This might be a really good message for your partners. Like, if you're trying to have a new partner go to an informal recruitment partner, this is great. People get it. I'm in the field. You're in the field. We can talk knowledgeably about this.

This might not be great language if you're talking to a participant. And look at the tailoring in the second. I just want to draw your attention. Elevator speeches could always be refined. And it's a good idea to practice them with each other. I used to start staff meetings where I picked out one person to provide me an elevator speech at the start of each staff meeting and we talked about improvement – just building ways to do that. And again, it increases your flexibility and your creativity.

Now we'll get into passive recruitment techniques. So what is that? This is any technique where we're removing the human interaction. We are now relying on a medium to transmit our recruitment messages for us, meaning that I am going to rely on newspaper ads, bus ads, radio, TV, social media posts, flyers, brochures. Our message here is static. It always stays the same. Once we put it in print or once we go to copy on that radio ad, that's it. That's done. There's no altering it as opposed to active recruitment where I can do that refusal conversion with you. I can change and modify my message based on our intersection.

You can't do that with passive, which means that all the burden for your recruitment messages is placed on the participant. I have to be at the right place at the right time to hear your message. Once I hear it, I have to interpret what it means. And I don't get to ask questions if I have misconceptions. Those misconceptions are now engrained with me.

Also, I then have to make a decision if this is right for me or not. No one gets to help convince me. And finally, if I do decide it's right for me, I now have to take an extra step to figure out how to enroll. So all that being said, passive recruitment is much harder to get a really good yield out.

Now, it reaches a broad amount of people. It's really good for spreading the word about your program. But you're going to reach thousands of people with this method. And some of them that come to you won't be eligible. They're going to miss the enrollment criteria because they didn't interpret that correctly or they didn't hear that part of the radio ad. And so you're going to waste some of your time on screening people out because they're not eligible.

And also the people that will be eligible will not be in the thousands that will get to you. Think about a flyer. What happens when you get a flyer on the street? Well, if you're like me, I usually toss them in the trash a couple of blocks later. That's what's going to happen to most of your materials. So they're good for broad dissemination. But they're generally bad to use on their own. They have their place. You should use these. You should use social media. You should use flyers. You should use other advertisements. But know that it will not get you what you need to hit your numbers. You've got to use some of those active strategies.

Remember, going back to that second slide I did – what are good strategies? – creative, flexible, and diverse. So we've got to have diversity because passive alone will not get you what you need. And now I touched on this earlier but I want to touch on it again. Tailoring of my materials: Everything you need to do, everything – active, passive techniques – all need to be tailored to your population and you probably need several versions of this because you always have to think about these things. So our elevator speech – let's take the one we just read.

I said it's probably great if I'm talking to partners, really great. But I'd probably have to change that slightly if I'm talking to a potential participant. Or maybe child care isn't the right hook. Maybe I need to think of a different hook. Maybe it's the right hook for one set of participants but not another. So you've got to tailor everything from your elevator speeches to your Facebook ad to your flyers. If we think about it, for passive techniques, if you're trying to reach a younger population, who picks up a flyer? – probably not a lot of people.

They're probably using the social media method a lot more than they're looking at the paper, or reading the paper or picking up your flyer. So even that, even changing the medium of your passive techniques, you need to get that nuanced in your recruitment strategies.

And again, going back, think creatively about how you might do that. First and foremost, though, keep in mind who you're talking to. Who are my participant's backgrounds? What are their characteristics? One big thing that influences everything is culture and reading level. I do not want to have complex language on my flyers or in my ad. If someone can't read it or comprehend, it it's done. It's ineffective. We need either to change it or scrap it.

So think about those things. Think about things like how gender plays into it. I once worked with a grantee that was trying to recruit fathers. And all of their materials had babies and moms and was bright pink. Dad's hated carrying those flyers around. They needed something else. And this grantee redid their flyers and made them look like party invitations. And they found a lot of success with that campaign. So think about everything, the finest details. Be creative.

Also, talk with your FPO and your TA coach about this – from your elevator speeches to your marketing material, talk with them. And I know that you had an advanced manufacturing expert speak to you two months ago in March about tailoring their materials to target audiences. So her discussions are useful for that specific industry and you can review her materials on the communities of practice if you want a little refresher.

All right. So let's take another poll. So how much of your recruitment is active? All right. Great. So it looks like we've got about eight people that most of their recruitment is active and four people that are some of their recruitment is active. What about passive? How much of your recruitment is passive?

All right. So it looks like almost all of you fell into that – some with a couple people in that most. But it's good to see that you guys are using a mixture of techniques. So hopefully, you're already practicing that diversity rule. And so just type in the chat box. How could you modify your current materials to be more relevant to your SWFI participants?

We're not getting responses here. So let me respond to a question and then everybody think about this and come up with some questions at the end related to tailoring. Really think about this and we can answer more questions in a bit. We did get another question from a grantee. It says: How is recruitment tied to certain times of year and how might you leverage that? That's a great question.

I think in my experience recruiting, there are definite slow times of year and high times of year. The slow times I find are back to school and anything from Thanksgiving to the end of the year are generally harder to recruit. I think the first thing that you can do is talk with your FPO about this. And what you need to do, in the spirit of being flexible, is increase your recruitment numbers in the months prior to that slow month so that if you do recruit less you actually have a good amount of padding in the previous months and then possibly increase as well after depending on how slow you think it is.

One of the big things, though, is to lean in to whatever holiday or events that's going on. I work a lot with couples. And one thing that we do is – like Valentine's Day is really great. We advertise date night or making a relationship a priority. New Year's is such a good time. Make your New Year's resolution to get a better job. Give a Christmas gift to yourself this year – we're offering training.

Whatever you want to do, you need to figure out – going back to creative – if you're not yourself, lean on your staff person who might be really good at crafting and tailoring your recruitment messages to be specific to the times of year. But you can definitely leverage that and it's definitely possible.

So moving on, I want to really quickly talk about data. This is really important. Your effective recruitment strategies are data driven. You have to. You have to have data to measure the success of your efforts. Otherwise, you will spin your wheels and you will keep doing things that are no good and not yielding anything.

Going back to that yield question that summon asked – how do you know what your yield is? Well, data is the answer. So you've got to set up systems for tracking that and make sure that you're applying all of your tools correctly and then being flexible and adaptive to what works and what didn't. We either need to fix what didn't work or scrap it. Those are your two options. You can't keep doing it.

So in order to do that, you have to set up a simple tracking spreadsheet. And for those of you that already have something in place, great. If you don't have anything in place, don't sweat it. Set up something really easy for yourself. An Excel file works perfectly fine with two tabs in it. The first thing you want to set up is your partner information. So list your partners. List who your contact information is and that organization. List their mission. List their programs, their target populations. And this'll be important for something we'll come back to in a little bit.

But you're going to want to track where your participants are coming from, where you're at with your partners, how many they're giving you, how many people they're giving you monthly or annually. Determine where they're at in your partner prioritization list. You want to favor the partners that are really good to you and probably have a lighter touch with those that are only referring maybe one person a month to you. But you don't know that until you set this up to really track it partner by partner.

More importantly, though, you have to track your participant information. Where did they come from? Well, I heard an ad. I spoke with a recruiter. I came from a partner organization. You need to know the specific source of where they came from. And then you need to know what recruitment tool. Did I use outreach? Did I use a referral? Is this word-of-mouth? Is it my ad?

And you might have multiple ads. You need to track your social media ads different from your TV ads different from your bus ads. You have to be that granular because recruitment is that granular. You need to track everything that you're doing because you're wasting time and resources otherwise by coming up with ads or paying for bus ads that maybe don't work.

You need to do trial and error. Try something, collect the data on it, decide if it's worth doing again. And it's not enough to just collect this. You have to review it. You have to-have to review it. I like to set up someone whose specific job it is to review the recruitment data at the end of each month and then have a meeting with the staff – particularly recruiters – and say, did we meet our numbers or not? If not, what was fruitful, what didn't work? And you use that data to drive your decisions. We're going to think creatively on how to revise our existing strategies so that they work. Or we're going to scrap them. We're going to be flexible and we're going to dip back in our toolbox to come up with something new.

But the whole point is that you have to look at it. You have to. And so just to close out the recruitment tools, we need to be creative and flexible. And we need to use all the tools in our toolbox. You can't just rely on one technique. You've got to incorporate everything including incorporating active techniques. I know that passive techniques are easier. They're easier to print off a bunch of flyers and drop them off. But your return on investment is so much higher when you incorporate active techniques.

So now I want to touch on developing and maintaining partnerships. And I want you to think globally about your partners. So you have your formal partners. And you can leverage them to help recruit for you, but you can also have informal community-based referral sources. And I really want you to think about those and think creatively about that.

So why do we need partners? Well, recruitment is just way easier with them. It really is, because hopefully your partners, they already have established services. They already have a participant base. They have events to recruit new participants or hopefully they do. If they don't have any of that in place, they're probably not a recruitment partner. Going back to your prioritization spreadsheet, your data collection, if they don't have any of that in place, move them down the list. Don't worry about them.

But all of this means access to your potential participants. So you can work to identify new and formal partners and build up your existing partnerships to really help with recruitment. But I should point out that building partnerships is not an easy task. Partnerships are relationships so you need to research what your partners are doing. You need to network with people. You have to have active engagement at all levels of an organization. Organizational leadership needs to be involved. The front-line staff needs to be involved. We have to have consistent engagement with our partners even after they start recruiting for us. We've got to keep that.

So all of that needs to be nurtured and maintained. You've got to collect the data on your partners. And I'll tell you why in a little bit. But it needs time and attention and resources. And because it can be – you have to have staff devoted to this. You need a formal process in place to really do partner development well. And always, as you think through your existing partnerships and any new ones or informal partners, talk with your FPO. Make sure they're informed and talk with them about potential approaches.

So the first key in leveraging your existing or new partners is having an in-person meeting. Too many people rely on e-mail to get things done. And this is bad. You've got to have your face time with each partner. You have to put in the work to establish this relationship. Remember partnerships equal relationships. So you have to get buy-in from everybody.

And who is everybody? Well, that's the leadership. That's front-line staff. We need the leadership to get buy-in to our program so the message comes in high that this is good and a priority. And it's the front-line staff who meet people on a day-to-day basis. So you have to have an in-person meeting. You might have to have two – one with leadership, one with front-line staff.

The whole goal of this, though, is to build that rapport, establish the relationship, let them see your face, sell your program. You're going to market to partners. Get them to buy in to it, to believe it. In order to do that, I suggest you follow this basic in-person agenda.

So you can obviously tailor it based on the organization. Just like everything, you've got to tailor your presentations. So before the start, you want to do some research on your potential partner to know what they're all about – what programs do they have, what's their mission? And I'll come more into that in a second to tell you why.

But what you want to lead off with is a brief history of your organization. Nobody needs how involved over time, but you want to tell everyone what you're organizational mission is and how long you've been around. Establish that you're reputable and that your mission's good. Now the bulk of your time should be spent explaining your target population and your SWFI Program.

You need to tell all of the front-line staff in particular but also organizational leadership who you're looking for. You don't want them referring people that you're going to waste their time to enroll to find out they're not eligible. You've got to tell them. And by tell them is really a euphemism for train them to identify your target populations for you.

So that's step one. Who are we looking for? How do we describe them? What's an ideal person look like? Additionally, you need to describe your program. Soup to nuts, they have to know everything about it. They have to know what participation's like. They have to know the benefits. It's really helpful here to walk them through like they were a participant. Here's what you go through at enrollment. Here's what the program's like. Take them through it all. Make sure to emphasize your goals and benefits, though, any incentives for participation. They want to know.

Again, going back to our referrals, we need to train them to speak knowledgeably about our program so that they can refer appropriately to us. And also, you want to ask questions of them along the way. We're talking about refusal conversion here. We want to know. We want to say things like, where do you think the barriers are for your client?

Does this sound like something that you're interested in or that your clients would be interested? Can you see referring to us? Ask them that. The less you tell them, the more you ask them, the more they tell you. And that's a really crucial piece. You can gauge and see where misunderstandings or misconceptions where a program might be and address those right then and there.

Once you're done explaining your program, you have got to ask them for something specific. You can't say, thanks for your time and walk away after that and drop flyers out and expect a good partnership. You need a specific request from them. You have to ask them to do something for you. That old adage: You don't know until you ask. So what do we want from them?

Well, going back, that second slide, that diversity of recruitment techniques, we want as many recruitment techniques to be present in our partners as possible. So what does that mean? Well, I want to conduct outreach at your site. I want to come to your annual spaghetti dinner for families. I want to be in your lobby once a week from 9:00 to 5:00 talking to people. I want you guys to refer to me. I want your staff to outreach to the other coworkers or programs there. I'd like to be on your social media accounts and have you post for me. And I want to be in your monthly newsletter. Ask for the moon and they will walk it back for you.

If you've done a good job talking about your program, showing that you're passionate in gaining that buy-in, they're going to say, that sounds great. But you know what? We don't allow people on our social media account. I'm happy to put you in the newsletter. Or you can't be in our lobby every week but you're happy to come to our events. They're going to walk you back. But don't be scared to be specific and ask for anything that you want there.

Another thing that you really want to focus on with partners is focus on reciprocity, the synergy. What's the win-win situation? So remember when I said research your partners and talk about your organizational mission. You should know that your mission's align. Your mission should align with each other or be a natural extension of one another. Similarly, know their programs. Maybe they're running that social service program. They have no employment stuff. Well, great. What a great place for me to fit in and fill a gap for you. What a great synergy we have here.

Potentially, you could cross refer to each other. Maybe they'll send you clients and as you see clients that need other services in your program, refer to them. Focus on situations like that. Be creative about reciprocity and make sure to talk to your FPO about that too. And you always want to close with what the next steps are. What needs to get done? What do you need to do today?

All right. Well, you're going to start recruiting today. Great. I'm going to be in your lobby next week starting at 9:00 a.m. I'm going to talk to Susan about it. Close with that. You want a firm commitment about what's going to happen. And then you want to make sure to bring everything with you. Bring all of your brochures, your flyers, your consent to contact. Give them everything that they can do to start recruiting for you today.

And then after this is all done, follow-up is really the key here. You need to capitalize on that momentum. The more amount of time you build in from your in-person meeting to follow-up, the more that that cools off and it has a chance of not being a great partnership. So send thank you e-mail to everybody that you can.

If you've got a list of everybody that attended, thank them all. Include any other supplemental materials they ask for. Maybe they asked for grant numbers or something, additional tailoring of material. Send them that within 24 hours. Make sure that you get your capitalized to that excitement, that passion. Send them everything they need. Reiterate those next steps. Include any materials that they might need. Reiterate the time line.

We just want to capitalize on the momentum and this is solidifying the relationship. Also, update your partnership tracker. You want to say, I went and did this presentation. These people were present. Here's the plan. Here's what I'm going to do. Again, it's a process that just helps you organize and track your partner development a lot better. And that way if you need to tap out, somebody else can tap in for you and know where you're at. And if that ever happens, you want to do a warm hand-off at the organization. Say, hey, Jon, I have to step out of the office for a week, but Grace is going to take really good care of you. You want to make your relationship seamless there.

And finally, maintaining partnerships. So we've solidified it. We're recruiting. They're recruiting for us. But that's not it. You've got to meet with them regularly. You've got to provide them with updates. You've got to be in communication. And it might already happen. Your front-line staff might communicate with each other. Maybe they share some client and they need to have joint meetings to talk about case managing or whatever other services you might be providing. They might be checking in.

You might need to actually send them updates or call for meetings to give them progress updates. Organizations like to hear that who they're referring over, they've actually got services. So I'm not saying share PII or anything. But you can say, you guys referred to us 20 clients last months; thanks so much.

And just so you know, the 10 clients you referred last month, 8 of them graduated. They want to hear that their participants are doing well in your program. So think about sharing those things. But again, we're collecting data on the partners. So that's what's driving that. That's what's solidifying that relationship.

It's making sure that you're always at the top of their mind. You don't want to be that lost partner that goes back to the back and then all of a sudden when priorities shift, they've never heard of you and they don't know if they want to refer to you anymore. Keep yourself at the top of their mind. So little things like that – just like regular meetings and updates really help. And it doesn't have to be monthly. It could be quarterly, every six months. You could have a partner newsletter that goes out, whatever you think of. Think creatively about that. Going back to creativity, don't forget about it.

Also, remember reciprocity. Don't be the helicopter program person that comes in takes, takes, takes, and then leaves. That's going to be a bad partnership and it will sully your reputation in the community. You need to be the person that either cross-refers if that seems like a good idea or helps them out, too, in some way. One easy way to help out your partners is if you're going to do direct outreach at a partner event, offer to help them set up or take down. Sure, it's extra time for you, but it's an easy reach. It's easy to make them feel like you're valuing their partnership and you're helping them at their event in some way. Identify that low-hanging fruit, so to speak.

All right. So let's put it all together. So what do we need? What do we need to be good recruiters? We've got a good recruitment strategy. Well one, we've got to identify people internally that have strong recruiting skills. We want to make sure that they're good marketers. We want to give jobs to people that have the appropriate skills. We don't want someone to feel uncomfortable doing that. You can push people to develop those skills. But identify who's good so they can help develop them with that person.

Additionally, you've got to craft all your material. Think about your elevator speeches. Think about your marketing materials. Think about your audiences. Remember that. The effectiveness of your recruitment message is dependent upon it. Finally, multiple tools, favoring the active strategies – don't just do passive. It's easier, but don't just do it. You've got to have diversity. And then really focus on developing and maintaining your partnerships. And think broadly about who your informal partners might be. And as always, talk to your FPO about any sort of partnerships. So now we're open for questions. And I'm going to turn it back to Lily. And Lily, you can take over from here.

MS. ROBERTS: Thanks, Dan. So if anyone on the phone has additional questions, please enter them in the chat box now. But we actually have gotten a couple questions that relate to the partnership discussion that we closed with. So one of those has to do with the concept of reciprocity, which Dan was talking about at the end. So could you talk more about how these informal partners in the community for recruiting, for example, if my program works with local schools, what can we offer schools to encourage them to help us recruit parents into our program?

MR. FRIEND: Yeah. That's a great question. Again, I would focus on synergy, reciprocity. We know that having parents that have stable careers provides better homes for their students. We know that income is inextricably linked with this. There's your "in." It's the natural extension of mission – of the school's mission. It's filling in a service. You provide services to students, but we're going to serve their parents.

And we're going to meet – let's go back to that child care example – we're going to make sure that children are safe while parents are training and to get higher-paying jobs because we're providing child care. We recognize this is important. And once those parents get higher-paying jobs, we know the benefit that it has to your children.

And that's how you're going to see it reflected in your schools. That's the pitch. Find the natural extension of the mission. That will be better than anything else you could possibly offer them. The next best thing is money. And you don't want to do that. You don't want the partnership based on the exchange of funds. You want the partnership that's philosophical in nature. That's the stronger one.

MS. ROBERTS: Great. And then another question is more to do with thinking about targeting different populations and tailoring materials to different populations. Can you talk a little bit, Dan, about the benefits or challenges of recruiting a target population that's already involved with another government program like WIOA or TANF?

MR. FRIEND: Yeah. I think part of that is just some hard-to-reach, low-income populations. They're just you've got some people that are probably system-shy or weary of programs. Probably other programs may have seemed like they were trying to take advantage of them. So you've got to – again, tailoring that approach. How do I deal with people that might be system-shy? How do I delineate myself as like a good, positive program that's not looking to take advantage and actually looking to help you? That's step one. You've got to put yourself in those people's shoes.

And the other thing is that this is a natural extension. If they're in the TANF program, we know that they can benefit from additional wages and training and things like that. So I think part of that is getting buy-in with your TANF organization to also help you.

So if you are a united force and they're supporting your program, then that's really good. That's a good strong – you've got a philosophical partnership there. And that's really strong. And you can lean on those strengths to say, what are the other TANF requirements? Maybe there is job training depending on whatever program they're involved in. Well, great. That's your natural extension. That's how you can get your foot in the door there.

MS. ROBERTS: Great. Thanks. Thanks, everyone, for their questions. We're going to be exploring recruitment challenges and successes in small group calls later this month. You've already received a worksheet to help you think about your recruitment approaches. And we're encouraging everyone to look at that as soon as you can if you haven't already.

If you have further questions about recruitment that come up after we finish today's call, you can e-mail them to me at LRoberts@Mathematica-MPR.com or just get in touch with your coach. I want to particularly thank our speaker, Dan, for his time and his thoughtful responses to all the questions.

MR. FRIEND: Thank you guys for listening.

MS. EVANS: OK. Great. So to get in touch with your technical assistance providers, you can definitely e-mail your coach. Also, feel free to e-mail the national office at SWFI@dol.gov. So again, thank you so much for joining us for today's webinar. A special thank you to your presenter, Dan – to our presenters: Dan, Lily, and the Mathematica team for a very informative presentation. Please stay tuned for upcoming events.

Also, please continue to visit the SWFI Community of Practice, the COP, and participate in our blogs and discussion posting. Thanks again, everyone. And enjoy the rest of your day.

(END)