**WorkforceGPS**

**Transcript of Webinar**

**Measuring Impact: Effective Training Strategies and Successes**

**Tuesday, May 22, 2018**

*Transcript by*

*Noble Transcription Services*

*Murrieta, CA*

LAURA CASERTANO: I want to welcome everyone to today's "Measuring the Impact of Adult Education and Training Programs" webinar. I'm going to turn things over to your moderator today, Gregory Scheib. He's a workforce analyst for the U.S. Department of Labor Employment and Training Administration. Greg, take it away.

GREGORY SCHEIB: Thanks very much, Laura. And thank you all for being with us this afternoon. As you may or may not know, I'm the project lead for the America's Promise grant, and happy to have you all with us today. Should be a very interesting webinar. I know we're all coming off of our recent performance deadline, everybody putting their performance into the (WIC ?) system. So hopefully that was a little smoother this go-around. But obviously, this is relevant as we're going to be talking about how we measure our own impact beyond just performance.

So the first thing I'd like to do before we – I hand you over to our presenters today – is just do a quick poll. And again, this is just to give us a sense of kind of who we're seeing today. We'd love to hear about who you are, so please go ahead and just let us know. We always like to see the program people coming in.

And I see there's 27 percent of you that are some things other than some of these other categories. So that's kind of interesting. But anyway, we're happy to have you all with us today. So I'm just going to go ahead and move this right on over. And again, as Laura mentioned, if you're coming a little late, go ahead and let us know where you're from and who you are in the chat.

But at this time I'd just like to introduce Louise Anderson, who's a senior associate with International Economic Development Corporation, one of our partners in helping to assist with providing technical assistance to our America's Promise grantees. So thank you for being here, Louise, and please take it away.

LOUISE ANDERSON: Sure. Thank you, Greg. Good afternoon everyone, and thanks for joining us today. I'm a senior associate at the International Economic Development Council, also known as IEDC. I'm part of the TA team for America's Promise grantees, and in that row on the coach for two sites.

With me today is Emily Bell, who is IEDC's senior director of professional development. IEDC does a lot of professional development training, and I'll explain a little bit more about IEDC in a minute.

But first, I'd just like to walk you through what we're planning to cover today. I'll talk briefly about IEDC, and then Emily will give an overview of our training and certification program and how it works. And the first part of developing an effective training program is to ensure that you have a strong understanding of what the needs are in terms of the skills that are missing and the skills that are needed.

We'll talk about the role of measuring impact in sustaining your program and follow that with a discussion of program oversight. In other words, to whom do you report your data and why? And finally, we'll touch on the importance of closing the loop by adjusting the curriculum based on what you learn from evaluating your training program.

So now, just a few words about IEDC. We're based in Washington, DC and we are the primary professional association for people who work in economic development. We have members all over the globe, although the vast majority of our members are based in the U.S. and Canada. Our mission is to help people involved in economic development do their jobs more effectively.

So economic development is a really broad field, so we have members who work for public or private economic development agencies or government offices. We also have members who work in workforce development, downtown development, chambers of commerce, community development, and small business finance as well as people who are involved through their work with universities, utilities, railroads, consulting firms and other groups. So all of these fields are critical to economic development. So as you can see, we have a really broad scope.

And a lot of people don't know exactly what economic development is, but ultimately, we like to explain it by saying that when we succeed, economic developers help to create and retain jobs and improve the quality of life in their communities. Our role is similar to those of most other professional associations that you're probably familiar with – ultimately knowledge sharing. So we do this through training courses and certifications, conferences, webinars, publications, technical assistance, and we also conduct some cutting edge research for our field. So that's a little bit about who we are and what we do.

And with that, I'm going to turn it over to Emily to tell you a little bit more about how our training and certification program works.

MS. BELL: Sure. Hi everybody. Thanks for joining us. So as Louise mentioned, I'm Emily Bell and I oversee IEDC's professional development training program and certification program. And the training program was created to establish a baseline understanding – knowledge base of economic development – core competencies in the profession.

Our training course portfolio is made up of four core courses and nine electives. Those were selected at the board level at the creation of the portfolio as the necessary competencies needed to succeed in economic development – so things like business retention and expansion, workforce development, entrepreneurial and small business development – all things that economic developers see in their day-to-day work. We put on at least 25 courses throughout North America, the U.S. and Canada, educating more than 1,200 people annually. So we see a lot of people through our doors and – from a lot of different places.

The training courses serve as the base requirement for the certified economic developer exams. However, their primary goal is not the – the primary goal is the education of economic developers, not creating CEcDs. Other requirements for the certification are four years full time economic development experience and attendance at a – preparing for a CEcD exam workshop, which kind of gives your candidate a wide, well-rounded view of what to expect when they take the exam.

So that's sort of a primer on where we're coming from and our professional development training program so that you can see where we're coming from as I talk about measuring the impact of these programs – you understand what we do.

Back to you, Louise.

MS. ANDERSON: So, what does all of this have to do with America's Promise grantees? We think it has a lot to do with the program. Some of the information might seem basic, but that doesn't mean it's any less critical in developing and sustaining effective training programs.

So, we hope the information that Emily shares today will be helpful – first in developing the right curriculum. To do that, you have to know what the needs are, so she'll talk about different techniques to conduct some market research. Understanding what makes an effective training program – what works for adult learners – can be helpful in identifying any kinks you may have in your existing training program or help improve your planning for future training.

And of course, evaluation is critical to improve training outcomes. By learning what's worked and what hasn't worked and why, you can then make adjustments that you need to be successful. You just really have to have this information in order to know whether you're teaching the right skills in the right way. So you'll learn about different techniques to measure impact, and when and how to use those.

Finally, effective oversight and reporting are critical for America's Promise grantees. Obviously, a lot of reporting is required through these grants, both through the Department of Labor and within your own institutions, and of course, for your employer and program partners and other stake holders. So a lot of the people that you're reporting to are the ones who are likely making critical decisions about the future of your program, so you want to make sure that they have complete and accurate information.

So with that I'm going to turn it back over to Emily to talk through how IEDC works through many of these issues in its own training programs.

EMILY BELL: Great. Thanks. OK. So as Louise mentioned, the first thing we're going to talk about – only briefly because I know that you've hopefully done this already – but I think it would be remissant (sic) in not touching on it. As we talk about measuring, we don't talk about how we get to that point.

So when you're talking about identifying needs, obviously long before you begin measuring you need to develop the curriculum, and the first step to that is market research through gap analysis or needs assessment. And one of the things, obviously, you need to think about when you are performing a needs assessment is keeping an eye on what the end game actually is. If you're not thinking about where you want to end up, you're missing an opportunity to make sure that you are coming to your curriculum development in a well-rounded way.

So for us as I mentioned before – our training program was developed to create a baseline – valid base – for economic developers, not creating CEcDs. So we – every time we create a course or adjust a course – that is sort of our mantra is that we're not teaching to the test. We're teaching to what is relevant to the profession at that time.

So you can assess training needs of your community in several ways – through individual interviews, focus groups, surveys, observations. Some of the things that you need to be thinking about – some of the questions that you can ask – things that will help you in the development is – what competencies or skills are most important to your population now? What does your population think the emerging needs might be? Two, three years down the road, how will the needs have changed? How do you best learn? Is it an in-person training? Is it in an online format? A combination of the two?

And then, fourth – I think is important – to understand your audience demographically; not just the basic demographics questions – age, race, gender, etc. – but level of education, socioeconomic situation. This is one that we really have to think about at IEDC, especially the level of education.

Economic development is a very broad profession. People come at it from a lot of different places. So our training program ends up being again, sort of the way people learn the real framework of economic development and how to work within it. So we need to know where our people – where our students are coming from, so that we can just teach to them.

So next is effective training programs. And this is a question I'd just like to sort of get a sense from you – if you could type it into the chat box. What are some of the characteristics of effective adult learning training programs that you have seen in your programs? What's working for you? So I'll give you a couple of minutes to type in – if you would – because it would be helpful to sort of frame the conversation.

So the first one is hands-on learning activities. So one of the things is like – I think what I'll do is sort of go through what I have here and work in your responses as well. So some of the things that we have seen in our training is – training the trainers. This has been really important, both in the curriculum development – include our trainers in that – and then we have regular meetings with our instructors to make sure that everybody's on the same page in terms of messaging approach, so that there is continuity throughout your programming.

Obviously if you're doing different topics and different training, there should be some variations, but you need to make sure that there's a common thread. And by training the trainers and keeping instructors involved in that conversation from the get-go, gets their buy-in and also makes sure that your meeting your needs there.

Our courses are taught by professionals working in the profession. They're not academic. I imagine that much of your training is the same. It's important that people who attend our training come out with real world skills that they can take back to their communities and put into practice.

And then, focus on case studies, group work and peer-to-peer learning. I see that's one of the things that came up in the chat responses. And one of the real values of adult education is the peer-to-peer learning piece of it. Obviously, the instructors are going to drive the course. They are going to share. They are the experts in them room, but the participants have a lot to share as well – and different perspectives that we find really bolster the training.

Some other things that folks noted are flexible scheduling. We did not do that for our trainings at this time but understand the value in that certainly. And then also, short-term training that is industry-driven. Obviously getting – I'm sure you're getting input from your local businesses to do that. So that's great as well.

So now I want to go sort of into the main piece of the presentation, which is measuring impact. And we're going to put up a whole – again, would like to get a sense of how you are doing your measurement. And if your answer is other, if you could put that into the chat box. And you can select more than one answer if you are doing more than one of these.

OK. So it looks like most people are doing surveys, but also others as well. Skills testing is something that I'm going to be going into in a bit. Oh yeah. Interesting. Interesting poll.

So one of the – for IEDC, what – in general, I guess – it's important to measure your impact on both a micro and a macro level – so always evaluating your training piece by piece. So at the end of each training you want to get a good snapshot on what worked and what didn't for that course. But then also, how that feeds in to your larger program and making sure that you're always thinking about the curriculum and training strategy as a whole and how each piece fits into it.

At IEDC, the way we do that is at the micro level, we send a survey out at the end of each course. And then obviously we track those over time. But then also every other year, we send out a member survey that includes larger picture strategy type questions that – we then marry those two things to make sure that the needs of the profession are being met through our training courses. And again, that sort of throws back to the needs-assessment piece – that we're just kind of continuously making sure that those things are working in tandem with each other.

So there are sort of three ways that we you can measure impact. Qualitatively – is the content quality meeting the expectations and the needs of the audience? Quantitatively – at the beginning of when you were setting your strategy for the training, did you have attendance/graduation rates, budget goals? Are you meeting those things, both individually and as a whole? And then obviously, skills testing and certification – can the participant demonstrate their skills at the end of the training?

So for the qualitative measurements, this may sound easiest to do via survey directly following a session. These can range from customer satisfaction with staff, facilities, and then moving down to the more specific on individual instructor and content-related questions. So we try and cover quite a lot in each survey. And so here are some examples of questions that we use. Obviously, we rate the overall course. And then a lot of our questions do stem – do feed directly into instructor performance.

Was the instructor knowledgeable? Did the instructor increase your knowledge – which I think is an important distinction, because somebody can be a genius in what they are teaching, but their method might not work for an individual or a larger audience. So I think those – it's important to have that distinction. Did the instructor facilitate group interaction – which kind of goes back to the peer-to-peer piece that I spoke about earlier – important to have structured conversation. And again, important to make sure that it's structured, so things don't get off the rails too much.

Would you recommend this training to a colleague? Was it useful to your professional development? Will you take another IEDC training course? And those, again, are a way for us to measure satisfaction in a way that might be a little bit more of a soft touch. Obviously, they've rated the course, but the answer to the question – would you recommend this training to a colleague – is one that we really pay attention to.

And then obviously, just for our own sort of market research – are you interested in certification? We do targeted outreach to those people who say they are, so that we're making sure that that pipeline continues to be full. And we are maintaining the level of interest in the certification.

So then, in terms of quantitative measurement, this can help identify immediate budget and attendance goals, but also long-term trends over time. Obviously, if you're not meeting your budget and attendance goals, there needs to be an adjustment – can be as simple as marketing strategy, outreach strategy, or might be a deeper dive into what your qualitative data is telling you about the quality of the courses. So when you're not – the quantitative data and qualitative data go hand-in-hand often, and so you need to take a look at both obviously.

This quantitative measurement – really, these are the things that drive for us our forecasting – budgeting for the future – and requires a fair amount of staff oversight, especially in the budgeting portion. Budgeting is always a little bit of a gamble, but when you have the data to support what you're proposing, it makes it a lot better to sell to leadership. And also obviously you have to be comfortable as a program manager in what you are taking on for yourself, and what you're going to be responsible for.

Skills testing and certification – this we have found has been one of the life bloods for the organization. For our organization, we have been able to maintain our certification as sort of the gold standard in economic development certification. And it has increased the profile of the organization and those who have the certification.

But through – skills testing and certification demonstrates skills in a very tangible way to both the internal audience and the external audience – so peer-to-peer, but also employee to potential employer. It helps both the program and the individual gain credibility. So, right off the bat the individual gains credibility by having a certification or a certificate, and as momentum builds the program gains credibility as well. So again, it's for us an important way to show skills earned.

These programs can be costly to manage and there needs to be a consideration on how continuing education – how you will integrate certification maintenance. We do a certification cycle of every three years, and we have over 1,100 CEcDs throughout North America. So it is intensive, so as – if you are thinking about a certificate – certification skill testing program, keeping in mind how workloads will change as your population grows.

So IEDC's CEcD certification. The exam includes three parts. There is an essay, a multiple choice and an oral interview. You must pass the first two parts – the essay and the multiple-choice portions before being granted the oral interview. Why three parts? One of the things that we take into account is not only the knowledge that we're testing, but also the soft skills.

So the writing in the essay, the critical thinking in the multiple choice, and the communication skills needed to pass the oral interview – are all things that are really important for economic developers who are representing their communities and connecting people and gaining consensus among community members. Those are all really important soft skills to have. So we sort of marry those two – both the hard skills and the soft skills together to create this exam that we think accurately measures the knowledge and the skills of an economic developer.

So this is just a bit about our certification program. By offering the highly sought after and comprehensive CEcD designation, IEDC strives to promote the status and credibility, as well as enhance the knowledge and performance of economic developers. So that's sort of at the crux of why the CEcD program exists and what we're thinking about all the time as we are adjusting our certification program to meet the needs.

In terms of evaluating training strategy – so this is sort of – goes back to the macro piece. The big picture training strategy should be discussed with instructors and oversight committees. So obviously at the staff level, at the program manager level, you're the person that's going to be – has a good (pulse ?) of what's going on at all times.

To get by and to work on strategy – obviously that needs to be a larger conversation with other parties involved, and again it's a sort of – base of all of this at the macro level – is are we teaching the right skills based on the data we've received? So you're not going to be able to evaluate training strategy after every course. This is going to take some time and the data – to allow the data to – to have more data.

But it's really important – sometimes anybody can get lost in the minutiae of the microdata, and it's really important to keep your head up and make sure that you're always going back to what the objective of the program is. And is the data that you are keeping – that you're receiving getting you to that objective?

So reporting and oversight – once you have the data, with whom do you share it? So again, sort of taking a look at your structure and who you're sharing what information with and when, is really important. Sharing internally – obviously this is going to get – help guide decision making and get internal buy-in. I have a boss, who obviously needs to be – who makes the ultimate decision on – or recommendations for our external partners.

But I need to be the person who has my hands in the data and truly understands it, so I can make an informed recommendation to him, so then he can make an informed recommendation to our board of directors. So IEDC staff – at the staff level, I am the person who has my hand in the data the most. I work with our CEO, who makes the ultimate recommendation.

And then we have some volunteer-level committees that also have input when – education and certification committee that – they are a committee that really digs in deeper to do things. And we involve them a lot in conversations about not only strategy, but at the micro level they see a lot of the qualitative data on each of the courses, and then sort of the 30,000 foot view as well. They're the ones who work through making adjustments. They do a lot of work.

And then the board level committees, which the education certification committee report to – and they make the ultimate decision. But they get, obviously a – by the time it gets to the board level, it's pretty well polished in terms of a recommendation.

And then externally, all of this data is going to help you craft your communications and marketing messages, both wide reaching in your community to help just increase the visibility and make a case for what you are doing, and how it helps the community. And then the more targeted, as this will – your demographic data will help you identify who your target market is. Sometimes that turns out to be a little bit different than what you thought it was.

So again, as you're keeping track of all this data, pay special attention to is your demographic data telling you what you thought it was? And if it's not, how can you adjust your communication strategy to adjust for that – because obviously the part of the sustainability piece to any training program is making sure that you continue to have people who sign up for it. So you need to make sure that you are meeting the needs of the population who is interested.

And then, making adjustments – again I say tread with caution on this. You're never going to be everything to everyone. It's very easy to – if you get a scathing review on a training program or a specific instructor – it's easy to get – throw your hands up and say, "Let's reinvent the wheel." But it's important to make sure that you are able to pull back and say – was this an anomaly? Are there small tricks that we can make without changing everything, because otherwise if you react to every piece of negative feedback that you get, you will constantly be changing things, which again is also not ideal because there will be no consistency in your programs.

There are – there will be little things that you will notice that you can do. And again, as you give a training one or two times, if you see the structure of session XYZ, the discussion part didn't work or the case study wasn't relevant. Those are small things that you can do – sort of real time. But you need to be mindful and strategic about how and when and why you're making the changes. And it sort of goes back again to the micro and the macro. How, if you decide to make changes, how do those changes speak to the goals and objectives of the overall training?

And as you're making adjustments, it's also important to – at the program manager level to make sure that you're walking into a larger discussion with concrete suggestions and recommendations. Again, because these training programs and certification go – testing programs can be high stakes – our certification program certainly is for us.

And there are a lot of people with a lot of valid opinions about how things should go, but as the project manager – as the staff member who is on the ground – you need to have specific recommendations that you're ready with, and structure the conversation around those. Obviously, what you walk out with might be different, but going into a larger conversation about adjustments without any framework is a recipe for frustration for everybody.

One example for us on the adjustment – curriculum adjustment. A few years ago, we created a new course on foreign direct investment and exporting. It was the first new course we had rolled out in many years, and we offered it a couple of times. We saw some feedback on – it was too – some of the sessions were too basic, not enough hard examples of what participants – how participants could take these seeds of information back and use them in their communities. It was more this is why, not this is how.

And so after a couple of sessions, when we heard this feedback a couple of times, we went back to the drawing board on a couple of the sessions and were able to tweak, both at the staff level, but also incorporating the instructors – because again, you want buy-in from all parties to ensure that everybody's invested in what you're doing.

So that sort of wraps up the presentation. I'll take questions if anybody has any, and happy to answer general questions, specific questions on our training programs, how to – again sort of back Louise's point on why this is hopefully relevant to you. Happy to answer any questions you might have.

MS. ANDERSON: Thanks, Emily. While we're waiting for some folks to put their questions in, I have a couple that I thought I could kick things off with for you.

EMILY BELL: Good.

MS. ANDERSON: And really – I liked the example of pivoting in regard to that (FDI ?) course – think that examples are super helpful. So the first question I have for you is really kind of two-part question. What are the biggest challenges that adult learners face? And can you give an example of how IEDC has adjusted its training over time to better address the challenges of adult learners?

MS. BELL: Sure. So I think one of the things that we're seeing with our population – and I think it's a larger trend in adult education in general – is lack of time – lack of resources, both time and funds. So traditionally, our training courses have been all in person. They're all two or three day in-person training. One thing I mentioned as part of the presentation was – online training obviously is a way to go. We rolled out our first online training in October of last year, and I think it probably is something that we will expand on in 2019.

But I think one thing that we are cautious of in making that switch is the in-person training for adult learners is still most effective – because online training, even with a great platform like Adobe Connect – you still lose some of that peer-to-peer piece. So it's something that I think we're in the process of figuring out ourselves – is how you balance the in-person training session that is the ideal, with the needs of the professionals. And so, I'm actually going through some market research on that now.

MS. ANDERSON: Thanks. I just wanted to also touch on data collection that – which you spent some time talking about. So obviously, some data are easier to collect than others. And so, I was just curious about some of the challenges or shortcomings there in terms of data collection. What is – what would you like to collect that is – that you're still trying to figure out – to collect. How to collect, for example. Or any other challenges or shortcomings to data collection.

MS. BELL: Well, I think for us it's actually the response rate – the incentive of getting people to answer the survey. We send the surveys out at the end electronically at the end of each training session. And we have a pretty high response rate, 40 percent. But it's still only a sampling, and I played around with incentives a little bit. I haven't been able to get people to answer much past that 40 percent piece.

There are obviously other ways to do it – you could do it in paper form and ask people to hand it to the staff person on the way out. But with 1,200 people going through our training programs every year, it's just too labor intensive to do it that way. But I think balancing – the survey data is obviously invaluable. But I also spend a fair amount of time at other conferences, at the courses that I attend – just talking to people and getting a more in-person informal feedback because I use that as I shape my strategy as well.

MS. ANDERSON: Thank you. We have a question following up on your comment earlier on in-person versus online training. And the question is how are you able to evaluate that the in-person training was more effective than the online training?

MS. BELL: So our data on the online training is obviously just a one-off, but the effectiveness of the – so it's a little bit, I would say almost anecdotal at this point. But for our in-person training we always get really positive feedback about – on our more interactive case study group work sessions. The online training – the main piece – it performed very well in the ratings but the main piece of feedback that we got was the lack of interactivity, even though we had a forum break out session.

I think one of the things – and this may not be true for the programs that you all are running – but for economic developers, networking is the thing. It's a huge part of the – both peer-to-peer and also in their communities. So the in-person networking part of the online training are really important to our population.

And that's a big part of why we feel – we will never go to an entirely online – I shouldn't say never. But I don't believe that we will move in that direction any time soon because it is – we've heard time and time again from our participants that that's a huge piece for them.

MS. ANDERSON: Thank you. It looks at this point like we don't have any additional questions from our attendees, although someone may be typing something in right now. So – and we are getting closer to 3:00 – so I think at this point, I'll tun it over to Heidi Sheppard, who is the lead program analyst for America's Promise grants.

HEIDI SHEPPARD: Thank you. And I just wanted to thank everybody for joining the webinar today, and to encourage you to register for the community of practice. You can see the links here on your slide – on the Workforce CPS site, so please sign up and be a member and create a member profile. And again, America's Promise community of practice – there are resources, there are blogs, event postings, community discussions, and more. So I encourage you again to please sign up and be connected.

And our next webinar will be Employer Panel. The – we will have three employers from three different industries, and they will be discussing industry trends in staffing needs. That will be held on June 19th from 1:00 to 2:30 Eastern Time. So stay tuned and be on the lookout for invitations to that webinar. And if you have any more questions, please contact your America's Promise TA coach.

And with that, we will say thank you unless there are any other questions or comments. We don't see any coming in, so thank you very much for your participation. And stay tuned for the link to a survey.

MS. BELL: And this is Emily. I just wanted to – again, thank you all for joining today. If you have any questions that we weren't able to get to today or one comes up afterwards, feel free to send me an email. My email's on the contact slide. But it's ebell@iedconline.org. I'm happy to answer any questions you might have. Thank you.

(END)