**WorkforceGPS**

**Transcript of Webinar**

**SCSEP Virtual Conference Bridging Workforce & Aging:**

**A Coordinated & Collaborative Partnership**

**SCSEP Delivery Model and Performance Part I: Take Care of Customers**

**Day 3, Thursday, December 13, 2018**

*Transcript by*

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JON VEHLOW: Welcome to today's webinar. My name is Jon Vehlow and I'm here if you need anything technically speaking. Hopefully, you won't need to hear too much from, but if you do have any technical questions, please let us know in that chat window on the bottom left-hand side of your screen. That chat window is open if you'd like to introduce yourself now.

So please go ahead and type into that chat your name, the name of your organization, how many are joining today, and if you're attending in a group. Even if you're attending from the first session to the second, we'd still like you to reintroduce yourself in that welcome chat right now.

You'll also notice that we have a copy of today's presentation, as well as session one presentation uploaded in the file share window. You can download that at any time throughout today's webinar. Also, a copy of today's presentation, as well as a transcript, recording, and executive summary will be made available on WorkforceGPS in about two business days.

Additionally, to continue producing quality content, we'll be sending out an anonymous survey concerning today's event. Please take a few minutes to fill that out once the webinar concludes. We'll also be sending out a follow-up survey and in a month's time.

So again, if you haven't already done so or if you are just joining us, please introduce yourself in that welcome chat. Again, we'll have that chat up throughout today's webinar, where you can type in your questions or comments at any time.

Welcome to "SCSEP Delivery Model and Performance One, Take Care of Customers." So without further ado, I'd like to kick things off to our moderator today, Michi McNeace, TwoTech, Incorporated, Older Workers Unit. Michi?

MICHI MCNEACE: Thank you, Jon, and good afternoon, everyone. Welcome back to the virtual conference. Today, we're going to focus on two things, and they're going to be two performance sessions. But the first one is going to be about what did they say. Take care of your customers and your performance will take care of itself. That'll be our first session and our presenter will be Mr. Bennett Pudlin.

And then, we will go into our second session, where – that is part two, where we're going to talk about make those optional special requests work for you.

With that, before we get started, what we'd like to do before Bennett gets started, is to kick off the session with a knowledge check. And in the knowledge check that's coming up, we're going to put up three polling questions. We have three questions that we would look to ask you.

And the questions are what percentage of unsubsidized placements were – poll question number one, with host agencies? Poll question number two, made by the participants without any direct service to employer by SCSEP? And the third one is percentage of unsubsidized placements were self-employment? If you would go ahead and answer those questions.

OK. They're coming in. They're coming in rapidly, aren't they? Great answers. We're going to give you guys a couple of seconds. Looking good. So everyone, what we're not going to do is provide the answers to you at this time. What I'm going to do is go ahead and kick this off and introduce Mr. Bennett Pudlin with the Charter Oak Group, and he is your presenter for this afternoon. And welcome, Bennett.

BENNETT PUDLIN: Thank you, Michi, and good afternoon everyone. It's been an exciting, but I'm sure somewhat exhausting, three days for those of you who've been with the conference from the beginning. This is a different guide of performance presentation than we've done in the past. This is not about the mechanics of performance. This isn't an in-depth look at how to diagnose performance issues. It really is trying to relate performance to the service delivery model.

And as Michi said, the first session is kind of an overview of the ways in which the service delivery approach impacts performance. And we're going to show you the tools available for you to understand what information you have available to help you understand your three different customer groups, participants, host agencies, and employers. And then, in the second session, we're going to dig down and look at two of those tools.

Looking at the folks who've signed up, I know many of you have been here for quite a while and some of this will seem pretty basic for you. But there are some folks who are new to the program. So we're going to take the liberty of doing some kind of elementary stuff about SCSEP performance system and the service delivery model. So I think the starting point is recognizing, as Steve told us at the kickoff, that we are unique in the fields of employment training and services for older adults. And that we are the only employment and training program designed specifically to meet the needs of low-income seniors.

And our statute enjoins us to focus on serving those who are hardest to serve, who have the least connection to the labor market. The sort of driver for everything we do in serving participants is supposed to be the individualized service plan, or the IEP, and that should be based on regular assessments. The statute requires a minimum of two assessments in a 12-month period. But obviously, we need to do those whenever circumstances warrant, beyond the 12-month requirement.

And the major component of the service delivery system is community service. And we are unique here, too, in that it is a universal on-the-job effort at removing barriers and imparting soft skills that are essential to help people move to self-sufficiency. As an adjunct to community service, we provide supportive services and a fairly wide array of additional paid training to those participants who are going to need a leg up in the labor market.

So the performance system, from its very beginning, in the 2000 amendments to the Older Americans Act, has recognized the dual purposes of SCSEP, the community service side and the employment outcomes side. And we have, during this entire period, maintained the balance in our performance measures.

So we have the three measures of service to participants, service level, community service, most-in-need, and we have three outcome measures around employment. And the new outcome measures effective this program year are employed in the second quarter after the exit quarter, median earnings in the second quarter after the exit quarter, and employed in the fourth quarter after the exit quarter.

And then, sort of bridging the two worlds of service to participants and outcome measures are the three customer satisfaction surveys, which are repurposed starting this year, to provide data for the new measure of effectiveness in serving each of our three customer groups.

So in order to understand where the performance measures come from and how they relate to the service delivery model, we've developed this fairly simplified flow chart, the critical steps in the program that participants go through.

So you can see that on the next slide. I'm not going to walk you through every element of this, but it starts in the upper left-hand corner with recruitment, determining people who are eligible, selecting those folks whom we have an obligation to give priority to, doing a preliminary assessment so we can get them into the appropriate community service assignment. And then what happens during the community service assignment in terms of removing barriers and imparting soft skills, leading to job preparation, job readiness, people exiting, and going into follow-up.

And you can see those black circles connected to each of the critical steps in the process flow identify new performance measures that are related to the activities that go on in those boxes. And as you'll see, the key to those measures is in the next slide, when we look at the QPR. But service level is SL and most-in-need is MIN, and you'll figure out the other acronyms.

The major tool that we've had available to us from the beginning has been the QPR. And I hope by now, because we've done a lot of training on this, that folks do understand how to read it and how to work with it. It is an absolutely essential tool, beyond the obvious performance measures that are presented in section E.

But in other trainings, we have shown how you can use the data from the QPR in section B particularly, but also section C and D as well, both to forecast what your performance will be and then, to analyze your performance after the fact and diagnose what the cause of any performance problems may be.

So we're not going to have time today to go over that training and how to utilize the QPR, but if you haven't had it, it's something you want to talk to your grantee about and see if you can arrange to get it. So if we go to the next slide, you'll see the first page of the QPR. That legend I talked about with the process flow is down in the lower left.

And the circles here call out some of the critical data elements on the QPR. And next to them, you'll see abbreviations for the relevant measures that they have an impact on. And it should give you just visually, without going into it, a very clear sense of how critical these data elements are in being able to understand the components of your performance.

And if we go to the next slide, you'll see the second page of the QPR. This is section D, with all the participant characteristics. And the items that are in blue and circled and boxed in blue represent the priorities of service. And the ones that are in orangey yellow are the waiver factors. And both of those combine to constitute the most in-need measure. Just a caution, that some of the blue and orange circles for the individual elements shifted out of range a little bit. So they're not entirely accurate, but we'll correct that when the slides are posted.

Again, my apologies for blowing through that so quickly. It is really important and we're spending some time on it, but that's not our focus for today. The focus for today is really understanding the critical components of the service delivery model and how they impact your performance.

So as we said before, the community service assignment is the universal service component that everybody gets that is the core of what we do and provide to participants. And for most participants, that's really all they get. And so it's got a lot of important work to do and its primary purpose is to remove the barriers for employment that have been identified and to develop soft skills.

And the critical components really start with the assessments that we mentioned and the constant re-assessment, both at regular intervals and whenever there's been some significant change in what's going on in the program, in the workforce, or with the participant, and the resulting IEPs, which need to be updated every time we do an assessment.

The other critical component, obviously, is the host agency itself. And I want to call out two critical aspects of that. The first one is the importance of having the assessment IEP process that leads to the assignment and leads to any change in the assignment be a collaboratives process. And we know from surveys that participants care very much that we understand their interests and needs when we make assignments.

And we also know, for the last several years, since we changed the survey in PY '15, that having a say in their assignment and in the types of training they're going to receive is also very important to participants. It goes to their satisfaction, but more importantly, it really goes to their buy-in to the whole process and their ownership of the process.

The second aspect of that is the fit with the host agency. And that really starts with the selection of host agencies that you do business with and making sure that you have an adequate supply of host agencies that have the capacity to meet the needs of your participant pool. And that any assignment to a host agency for individual participant is very intentionally designed to meet that participant's need, as reflected in the IEP.

From the host agency perspective, which is the flip side of this, host agencies very much value our understanding of their business needs. They also value having some choice in the assignment and making sure that you give them sufficient information about the participants assigned.

Michi asks to just pause here for a second to also recognize that there will be occasions when you're not going to be able to put someone in the ideal host agency assignment right from the beginning. And there may even be rare occasions when you can't find what you think is even a minimally appropriate host agency.

SCSEP policy has long recognized that. In extreme cases, you can assign the participant to the local project or to the grantee for the limited purpose of gaining greater insight into the participant's needs and ascertaining what kind of assignment the participant might be able to handle while you're doing additional research, but that's for extreme cases.

And in other cases where the ideal host agency isn't available, you can usually find another host agency where the participant can gain at least some of the soft skills and some help with the removal of barriers that are identified in the IEP, while you keep trying to look for a better assignment. And Michi, please jump in if there is something else you'd like to add to this.

MS. MCNEACE: No. That's perfect. What I wanted to do is after you're doing with your next slide, I would like for us to stop and answer questions.

MR. PUDLIN: Sure. We've really been focusing on understanding the individual customer. I think when we talk about having a deeper understanding of the needs of our customers, we also want to get a top-down view, as well as a view from the bottom up. And one way to do that is to understand the entire applicant pool and the way it's constructed.

And why you want to do that, I think is pretty obvious. Although our participant characteristics are quite stable quarter to quarter and even year to year, they do change somewhat, especially in response to changes in the economy. So as we're in a recession or as we're in a recovery, you will see some significant changes in the demographics that impact education levels, even impact gender, that I think you need to be conscious of.

And for purposes of this presentation, they're really critical in helping you figure out what are the pieces within your service delivery model that you need to have available to meet the needs of the diverse participant pool. Because there is tremendous variation within the pool and you have to– obviously, you can't customize entirely the program for each individual participant, but you can come pretty close.

At the same time, you need to have an understanding of the kinds of tools you need to be able to meet the various needs. And so without that picture, I think you're going to perhaps have a tendency to not have sufficient capability to customize and sometimes, have to do a forced fit. And one size clearly doesn't fit all in this business.

Another reason why you need a good understanding of your participant pool is so that you can have a clear sense of what your priorities are, your unmet priorities, for enrollment so that you can target recruitment and develop appropriate recruitment strategies. Part of that is going to involve getting referrals from community partners, non-profits, community-based organizations.

So you're going to want to do outreach to them for that purpose, but you're also going to want to be marketing the program to host agencies so that you can recruit and enter into agreement with a broader array of host agencies that have the capacity to meet your particular participant pool's needs, and similarly, identify employers who are going to be in the best position to hire your placements. Without knowing the pool you're dealing with, you're going to have a hard time doing an effective job of that marketing.

And then, finally, obviously, this knowledge is critical for your ability to target your own resources and make sure you're devoting appropriate resources to the needs of each critical segment of your participant pool.

So with that, Michi, we can go ahead and answer some questions.

MS. MCNEACE: Great. Thank you, Bennett. First, before we answer this one question, I wanted to go back to one of your bullet points on slide 14, where we talk about what to do when there are no appropriate community service assignments. I'd like to open that up to the audience to say what do you do when you don't have an appropriate community service assignment for your participant upon enrollment or any time where you need to rotate them? If you can put some of your answers into the chat feature, that'll be great.

We'll give you a couple of seconds because that's a good topic. And what we find a lot is when there is not a community service assignment readily available, what do you do and how do you get that participant into the program where they're earning wages? But the– we have multiple people typing. They're jumping in. Cut each other off on the freeway.

We have one that came in that says network and find the right fit. And we have another one that says ask them to look around and see what type of post sites they would accept based on their abilities and interests. Reach out to new host agencies and be creative with new assignments. Bring them to the office and find training I can provide. Self-direct job searching in our office for 30 days while we find the appropriate host agency.

What we have– when you break down the skills they need, then find a host agency to part while you develop the new one. OK. Motivational interviewing techniques. OK. These are some great answers. Any comments, Bennett?

MR. PUDLIN: No. I agree with you. I think they are good answers. One thing I didn't see explicitly in the responses is once you have made an assignment to a host agency, even if it's not going to be the permanent assignment, you can send the participant out for some basic training. And as we're going to see in a minute, computer training is almost always appropriate for someone, and that buys you some time as well.

And I do just want to clarify that even if you do bring someone into the office to do work with them, you still have to have a community service assignment for them. So if you have a good enough host agency, you can put them in there temporarily. And if you don't, you can assign them to the project office and do appropriate work with the participant there. And you're going to, then, have to act as the host agency in that limited circumstance. I think we need to move –

MS. MCNEACE: Let me have you answer one question before we move on. What services are considered to be substantial services to the employer by the SCSEP program? That's a good question and we get that a lot.

MR. PUDLIN: Yeah. So that's a critical component of the employer-customer satisfaction survey. Under the current survey rules, we can only send this survey to employers where we've had a significant role in making the placement and the employer is aware of that role. They know who we are and that we have done something for them. Because the way the current survey is designed, the questions all key off that relationship.

If there is no relationship and they don't know who we are, they really cannot get the employer's survey. So there is a field on the unsubsidized employment form in Spark where you have to check whether you've provided a substantial service in connection with a placement. And that's what we use for the survey. We're going to talk about that a little bit more when we get farther down the road.

MS. MCNEACE: Thank you, Bennett. That's it. So we'll go to InfoSPACE.

MR. PUDLIN: Yeah. So you should all be familiar with InfoSPACE. If you're not and you need access, you want to get a hold of Aaron Mitchell and he can set you up. We've been running InfoSPACE for many years, I think going back to PY 2007, and it provides views of the performance measures in a way that's far more comprehensive than dialing up individual QPRs, so that you can see clusters of grantees.

You can see measures over time, etc. And I want to just show you something we added a few years ago, where we've started disaggregating the entire participant pool. So we take everybody who was active during the reporting period. It's essentially the numerator of your service level, all those people, and we let you view them by any of the 40 characteristics that are in section D of the QPR.

So if we go to the next slide, and at this point, you might want to use the box at the top of the screen so that you can enlarge it if you have trouble seeing. But this is the participants by dimension function in InfoSPACE. We're looking at final PY '17 data, and it's showing you the breakdown of all active participants during this program year by their age at enrollment.

If we can go to the next slide, I hope everyone's been able to enlarge their screens, what you're looking at in both the chart and the table is both PY '17 final and the last quarter of PY '17, quarter four. You're seeing, again, the whole active participant pool for the year broken out by educational level. And if we go to the next slide, what you'll see is the cost of education and age. And you can see how many participants are in each of those cells by education and age.

So in InfoSPACE, in addition to looking at individual characteristics, there are four core characteristics that you can pick and cross them with any of the other characteristics. And those four core characteristics are gender, age, education, and race. So you can select any one of those four and cross it with any one of the other dimensions that you want to see.

MS. MCNEACE: So right now, Bennett, we're going to stop again for another knowledge check. And we will have – (inaudible) – come out with three questions.

And the three questions are what is the percentage of host agencies that have asked to remove a participant? What is the percentage of host agencies reporting no increase in the amount of services that they provide to the community as a result of participating in SCSEP?

And the third question is what is the percentage of host agencies that would have liked participants to come with more basic computer knowledge? All three polls are up on your screen.

Give it a couple of minutes. All right. So I do believe that this time around, Bennett is going to be a little bit more kinder and give you the answers; right, Bennett?

MR. PUDLIN: Yes. Indeed. We're not going to make you – we wanted to have one set of critical questions that you had to wait for and make sure you stay to the very end; right? Put up the next slide, please, and we'll go over the answers.

MS. MCNEACE: There it comes. Ta-da. The answer is –

MR. PUDLIN: There you go. This was a pretty surprising number to me, that 41 percent of host agencies have asked to have someone removed. That could be for a variety of reasons, but I took that as an important reminder that we need to stay in pretty close touch with our host agency customers to make sure that we're making appropriate matches and helping work out problems as they arise.

The next one, people got right. That seemed to have been the winner in terms of the answers. That, too, was a bit surprising to me, that – fortunately, virtually none of them said it decreased the amount of community service they could do. But I expect that number to be higher because one of the purposes of the program is to not just increase participants' opportunities to be in host agencies, but to increase the capacity of host agencies to serve their communities. So it looks like that's an area we can do better in.

And I show you these not just because they're interesting, but because through analysis, we know that these two questions have a very direct impact on the satisfaction level of host agencies. The third one, people, I think, overestimated the degree of unhappiness with the computer skills of our people. Employers did – the correct answer here is lower than folks guessed. But it is the largest skill gap, as we'll see, for both host agencies and employers.

So we've talked about the assessment and the IEP and how that should lead to job rotation and even a new host agency assignment, as necessary when the participant can no longer achieve further gains in the original job. But it can also, obviously, lead to an array of additional services. So that's a critical tool at the individual participant level. The participant survey, I've listed here the questions in the current participant survey that are, I think, really important for this process.

Q4 is understanding why participants enroll in the program, is a key to knowing what their expectations are and being able to meet or exceed those expectations. We did talk about understanding participants' employment interests and needs. And Q10, receiving training needed for the assignment. Q11, having a say in the skills gained. Q12, computer training. And Q7, getting needed supportive services.

All of these matter to participants. They affect the overall satisfaction. But again, the theme of this webinar is taking care of the customer, and performance will take care of itself. So obviously, these are the right things to focus on, and they will pay dividends in terms of improving your survey scores.

Also, the host agency survey, the poll touched on many of these. Understanding their business needs. Giving them sufficient information. Really critical is staying in touch. And by the way, we do a good job there. Host agency having some choice. The degree of preparation that the participant has. Not in terms of hard skills, but just in the ability to be successful in the host agency.

Obviously, the host agency, like employers, cares for the quality of the match. Participants needing supportive services is a factor. And question 14 is host agency requesting that someone be removed. Question 13 goes to whether they feel that we sometimes remove people before they're ready.

So in addition to the survey report, two of the management reports are directly relevant for your understanding the host agency pool. In the next slide, you'll see the first one is the host agency management report. Again, if you can expand your screen, you'll see down in the lower right, the menu for manager reports.

So this one is the host agency report and it will tell you the total number of host agencies, those that are active, number of participants per host agency, and the duration as a host agency of – average duration of the organization, all host agencies.

And if you go to the details, you'll see for each individual organization, the same information. How long they've been with you. So here, you can see that we've got an average of slightly under four years, three and a half to four years, average duration as a host agency.

Next slide will show you assignments by host agency. So it just adds a level of detail. And again, I apologize for the screenshot. You probably want to enlarge your screen. But this also will show you the number of host agencies, those that are active, the number of – I can't even read it. Hang on. Average number of participants for host agency and the average length of the assignment. And you'll get the details under that for each individual host agency.

Next slide. So something that we are working on, not yet available to you, but I'm going to give you a preview in the next half of the presentation, is this idea of profiles. So the InfoSPACE allows you to look at one dimension at a time or with regard to those four core dimensions, you can look at two dimensions at a time across your entire participant pool. As you'll see in a little bit, we can also use InfoSPACE in order to look at the outcomes of participants and understand which clusters of characteristics are associated with better and worse outcomes.

The profiles will let us pull together more than two characteristics or dimensions at a time. And our goal is to come up with a relatively small number of profiles across multiple characteristics that will describe, together, a significant portion of the participant pool in a way that will give you insight into the needs of your participant. That's something we're working on and it's planned for a future release of InfoSPACE.

MS. MCNEACE: So Bennett, at this point in time, we're going to go do a little check discussion with the audience. So we have some questions that we would like the audience– and we would like to have kind of an engaging conversation via chat with them. So first question is what tools have you found most useful for analyzing your participant pool and understanding their needs? If you can go to the chat feature and put in your response. And as you can see, we have the question in the chat feature as well.

OK. We're going to go into – I'm going to throw up another question. What additional tools would you like? And the third, what tools have you found most useful for analyzing your host agency pool and understanding their needs? And what additional tools would you like for that?

Let's see. Audience, these questions are for you. So we have one response, Bennett, that I'm seeing. It says data collection handbook with screenshots and a search with the answer. That would be cool. And one says eligibility forum and one-on-one. She would like that data collection handbook on Spark.

We have one that says we would like the tools of the host agency for all national grantees operating within our state. Pre-assessments and one-on-one interview. Creating new host agency. Utilizing social media and accessing their needs. Tools to measure motivation. Perhaps a type of SWOT analysis. Copies of host agency job descriptions. Another one, they would like motivational training tools for participants. Another one, tools to measure motivation. Any comments, Bennett?

MR. PUDLIN: A lot of good ideas here. I'm agreeing with Olga, who says motivational tools, very complex. Difficult to use. And I think in some ways, potentially controversial. I think what the comments reveal, I think, is that folks feel they have a pretty good handle on understanding individual participants and individual host agencies. And obviously, that is critical, but I think we also need, as we've tried to present here, a set of tools that give you a higher-level view of the entire group of participants in host agencies.

Obviously, if you're a small entity, a small sub-grantee, aggregating up from a small number of participants isn't difficult. If you're a grantee with several thousand participants or a thousand host agencies, you're probably not going to be able to aggregate up from the individual level. You need to have a top-down view as well. So I think that's something we want to spend perhaps more time on in the future.

MS. MCNEACE: OK. Great. And before we move on, I have a couple questions for you. There's a question that says, "As the project director, I have never seen a participant survey. Any chance we can get a copy?"

MR. PUDLIN: Well, I think that's really a question for you, Michi, since you're the one who's been posting these on the WorkforceGPS every year. And I would certainly hope that all project directors, sub-grantee directors, are notified as soon as those surveys come out. Because they are a wealth of critical information for folks on the ground doing the work.

MS. MCNEACE: They would like copies of the survey. So what I think they're asking is can they have a copy of the actual surveys that are sent out to participants and host agencies?

MR. PUDLIN: Sure. We can – trying to think if we have them online. If not, Michi, we can give you PDFs to post. There is one for the employer survey that you've currently posted on WorkforceGPS. So we can certain add the participant and host agency.

MS. MCNEACE: OK. Great. Here's a question, and it's actually to both of us. "Bennett, what would you advise if there are no project offices?" When you mentioned earlier if there's no community service assignment, if you can assign them to your project office is normally the local area project office that serves the participants in that area.

So if there's not a project office, what do we do? Any ideas? Any suggestions? How about pre-assignment training, Bennett?

MR. PUDLIN: Well, so here's the thing. Even training can only be provided – it can be provided prior to the participants starting work at a host agency. But the requirement is you can only spend SCSEP money on participants and folks don't become participants until they've been assigned.

And so you're going to have to find an appropriate assignment. Hard to imagine there are no host agencies and no project offices anywhere. I think you're going to have to do the best you can, even if it's not an ideal assignment, to get someone started at a government or non-profit agency while you look for a better assignment. It is a critical part of the grantee's obligation to find, cultivate, and enroll host agencies. So you're going to have to bite the bullet and do it.

MS. MCNEACE: OK. Great. So with that, we're going to move on to the next slide.

MR. PUDLIN: And I think we're going to have to speed it up a little bit, just because we've got a lot of material to go through. So just a caution before we dig into placement, which is the focus on the next section. While placements are a major goal of the program, the regulations are very clear that it's not the only outcome.

And in fact, only about 37 percent of our exited participants last year had a placement. And obviously, you understand that if folks are not going to wind up with a placement, you have an obligation under the regulations to modify the IEP to reflect other forms of self-sufficiency and to begin significant transition planning with folks far enough out so that they have time to put these other elements in place before they're exited.

And what are they? Things like income supports, social engagement, and volunteerism are critically important to the overall health of older people. And that's something we can assist with if our participants who are going to exit without a job do not have them in place already.

Next slide. So again, we want to talk top down and bottom up when it comes to looking at outcomes. And again, you're going to start with the tools at hand. Are the profiles that we're going to see in a little bit. Are the dimensional analysis, the assessments, and the IEPs. They'll give you a good sense of whom you're working with and what their needs are. And with that understanding, you should be able to do a rough triage of your participant pool for purposes of placement.

And so at the first level, you're going to identify those participants who are most motivated and, you probably don't need a test for this, and most prepared for employment. And these are the folks who are going to need the least additional preparation from you and you'll have the easiest time placing them.

At the other extreme, you're going to have a group of folks with significant barriers. They may be much older. They may have disabilities or they may be frail, but significant barriers and perhaps motivational issues as well, which cause you and they to decide at some point that unsubsidized employed is really not a feasible goal. And so you're going to focus on other aspects of self-sufficiency. You're not writing these people off by any means. I think because you have a lot of really important services you can deliver for them – and you shouldn't make this decision prematurely. But on the other hand, you need to be realistic and provide adequate lead time to put other supports in place, if that's what's going to be needed.

But what you really want to focus on is that big group in the middle. And these are the people who could go either way, and it's going to depend on their motivation and it's going to depend on your helpfulness whether they wind up leaving you for random reasons that are going to have a negative impact on their lives and on your performance, or whether they're going to leave you to get a job. And that's where you really want to put your energy.

MS. MCNEACE: Here is where we're going to break again for a quick knowledge check. We have four questions up there. So what we'd like for you to do is type in your answer into the chat feature.

 And that is for question number one, on a scale of 1 to 10, what score did participants give the program for providing them needed help to prepare for the workforce? As you can see in the chat feature, this question is up there. Question two is on a scale of 1 to 10, what score did participants give the program for helping them find a job? We're getting great responses. We're going to jump in there and throw in, too, again, on a scale of 1 to 10, what score did participants give the program for helping them find a job? Wow. Are you watching this, Bennett?

MR. PUDLIN: I am. Are we going to be able to get a average when we're done or –

MS. MCNEACE: We'll see, but it looks like the stock market. You know, when the stock market – (inaudible). Question number three, what percentage of participants said the computer training they received was appropriate for their needs? Throw that in their job. All right.

MR. PUDLIN: I hope we're doing better than the stock market. It's been a bad couple of weeks.

MS. MCNEACE: All right. For the sake of time, we're jumping to number four. What percentage of participants said that the program did not help them obtain needed social services? It's rolling down a little bit. Do we ring the bell when it's over? And I do believe, Bennett, you're going to provide the answers; right?

MR. PUDLIN: Yeah. Let's bring up the slide, please.

MS. MCNEACE: There it is.

MR. PUDLIN: OK. So just want to clarify. This is not meant to be an open book test. It's not testing your recall of the surveys, but rather, your own sense, from your own everyday experience, of what you would expect the score to be. So preparation for the workforce, not a bad score. Average across all participants was 7.9 last year, out of 10.

Most programs would consider that a decent score. It's on the low side for us. You know, we're used to seeing something in the mid to high eights. Number two is really a problem, I think. Helping participants find a job, 7.2 out of 10. That was the lowest score in the survey. So it's not horrible, but we are capable of better.

Computer training, appropriate, 65 percent. Not bad. The flip side of that is 35 percent said no, in one form or another. And the last one, a quarter of the participants said they did not get the supportive services they needed. It may mean they got none or what they got was not appropriate to their needs.

But these are not meant to answer the definitive questions for us, but they should be occasions for you to do some probing and understand whether you have the appropriate mix of service to adequately respond to the perceived needs of your participant customers. I believe we have another poll coming up. Yes?

MS. MCNEACE: Yes. We do. We're going to have four poll questions that come up. And the question is what percentage of employers would like participants to be better prepare in each of these categories? Category one, computer knowledge. Two, knowledge of what the job requires. Three, how to behave with co-workers and customers. And four, is basic employability skills.

MR. PUDLIN: So we're going to put those first two poll questions up first. And then, we'll up the second two poll questions in a second. Get people to answer these first two right now.

MS. MCNEACE: For those of you that like – (inaudible) – did not change. All right. So we're going to go ahead and move to the answers. There you go, Bennett.

MR. PUDLIN: Yeah. So this question allows employers to select multiples. But as you can see, the greatest need identified by employers was for computer training. It's a pretty high percentage. So we're doing okay there. I think with regard to the others, you've probably been a little too hard on yourselves. Again, I think we're doing okay, but there's some room to improve. And one thing to keep in mind is that from our conversations with employers, we don't think they have unrealistic expectations.

They understand the kinds of folks they are hiring and do not expect that our people are going to be able to hit the ground running. Employers expect to have to teach people the specific job once they're hired, but they do expect they're going to come with the basic soft skills, employability skills, understanding of what the job's about, and how to behave in the workplace. Those are critically important to employers.

So while these scores are not bad, I think they, again, are a signal to you about ways in which you might want to tweak the service delivery model for some of your participants while they're still with you. Can we move on? Because I'm a little nervous about the time here.

MS. MCNEACE: We've got 27 minutes left for this presentation.

MR. PUDLIN: OK. Good. We'll have time for discussion, which is, I think, important.

MS. MCNEACE: Before you move on, just real quickly, one question. How does self-sufficiency exit count in our performance measure?

MR. PUDLIN: Well, the performance measures in terms of outcomes, there are three of them, and they're all employment-based. So if somebody leaves for some other reason and does not get a job, that's going to be negative. But the customer satisfaction measure is also, this year, a core measure. It used to be a core measure before 2007.

From 2007 to '17, it was an additional measure that wasn't– that you weren't evaluated on. And now, you're evaluated on it again. So I would say that working with participants who are not going to get a job to provide other kinds of self-sufficiency will absolutely be reflected in their scores. So you'll get an indirect benefit in that way.

Whether you do or don't, it's a legal responsibility you have and it's certainly a moral one. We can't have people coming to us with significant barriers that are impacting their ability to be successful in their lives and have them stay with us for four years and then leave us no better than they arrived. So the reg says we're going to make sure that doesn't happen. And we're going to look at a couple of concrete ways that I think we can have an impact on people's quality of life, whether they get a job or not.

So if we can, the transition now from the community service assignment, where we focus on basic employability and soft skills, to how to get people ready for employment. And obviously, some of that goes on just by virtue of being in the environment of the host agency, which is like an employer. And for other people, it is an employer. But beyond that, we have the ability to supplement what happens in the host agency with additional paid training that complements what's happening in the CSA.

And we provide that – because I saw there was a question earlier. We provide that through the portion of the standard grant funds. They're designated as other participant costs, OPC, and they constitute 11.5 percent of your grant award. And in addition to that, we have something additional training and supported services, which would let you dedicate up to another 10 percent for this purpose. And we're going to talk about APSFs in the next webinar.

However, because the dollars limited, and even when we do spend them, we're obligated to attempt to obtain the training services through a workforce and community partners. But because the dollars are limited and scarce, want to make sure that we're going to utilize these tools where they can make a difference. And so we need to identify participants who are willing and able to take full advantage of the training and we need to make sure we're getting training that will contribute to placement at a better job that participants would otherwise get.

I'm not going to walk you through every one of these. The quizzes have brought to light several of these issues already, but the participant survey, we talked about some of the concerns participants have around their enrollment and their host agency experience.

But here's some hard data that we just did in the last quiz about how the evaluate their preparation for employment and their help in finding a job. And at the other side, we have the employer perspective that we also saw in the quiz. And we can understand a lot about our employer pool, not individual employers but employers collectively, through the survey questions.

I mentioned before that the current employer survey is only going to that subset of employers, we now know 21 percent, to whom we've provided a service in connection with the placement. We've been working for several months with a grantee design team and hope to soon unveil two new versions of the employer survey, one of which will go to all employers with a placement, not just those that we helped make the connection for the placement. It's going to go to all employers. And then, it'll have a couple of skip questions that only the subset of employers that we helped will answer.

And the second version of this survey, something that many of you have asked for, is going to be a separate version of the employer survey designed for the 31 percent of our placements that are with host agencies. And so they're going to get a separate version of the surveys, we hope. These surveys are in the process of being developed. They have to go through a clearance process with OMB, and if we're really lucky and have a strong tailwind, we can have them in place for PY '19.

So in addition to the surveys, another way to get a picture of your employer pool is with two more management reports that mirror the two host agency reports we saw a few minutes ago. We can go to the next slide. Again, you're going to want to expand the screen if you have viewing this. But this is going to show you the number of employers that you have entered into Spark, how many of them are currently active, the average number of participants per employer, and the number of years the employer has been working with you.

And then, at the detail level, you'll see each individual employer and see for that employer, how many participants they hired, how long they've been with you, whether they're also a host agency, and whether there was an OJE involved. We're going to talk a lot about OJEs in the next hour. And also, if they've got an employer survey, when did they last get it?

If we go to the next slide, this is going to show you placements by employers. So it's a different view, but it's going to contain similar information. You'll see the number of employers, those who are active, and the average placements per employer. And then, the details are going to tell you the job code for the placement. And they're also going to tell you whether the placement resulted in credit for entered employment or retention.

Remember, we're looking back at the old measures. We expect to have new versions of these reports in the new CMS system. So they'll reflect the new measures rather than the old. But for now, looking back at PY '17, you'll see did this last only the entered employment or did you also get a retention count from this placement?

So very helpful information. You can – as with all the management reports, you can export it. And then, you can analyze it in different ways to suit your purposes, but it should give you a very good sense of what are the employers you're working with, which are the most productive of those employers in terms of how long they've been with you, and how many placements they've given you and what kind of outcomes you're getting. Which employers are giving you the best outcomes? And armed with this information, you can really beef up your employer engagement activities.

MS. MCNEACE: This is where we will stop again for a knowledge check. I feel like we've gone back to school. I did refer to Bennett as Professor Pudlin at one point in time. So now, he knows why.

So knowledge check. What we would like for you to do is go ahead and provide the answers in the chat feature. We have four questions and actually, it's four groups to the one question. For each question below, indicate which group achieved the higher rate of entered employment in PY 2016. Number one, which one in that group? Number two, which one in that group? Number three, which one in that group? Same goes for number four. Just put the group in your chat feature.

MR. PUDLIN: And by the way, that's a typo. It should have said PY '17, but that's okay. The number didn't change very much.

MS. MCNEACE: OK.

MR. PUDLIN: Go to it.

MS. MCNEACE: Go to it. The ticker's one. Tick, tick, tick. They're coming in. We have knowledgeable grantees. We do. OK. So while they're putting in their answers, we're going to go ahead and move to – and Bennett was going to provide the answers.

MR. PUDLIN: Right. OK. So the answers are highlighted. With regard to entered employment, Hispanics have always or almost always done better than non-Hispanics. Number two, homeless. This was a surprise to me. We have a very high percentage of homeless or at-risk of homeless participants.

And because it's a barrier to employment, I thought, and I imagine some of you thought, that homeless people would have a harder time getting a job. And the answer is not that at all. They do better than the not homeless. And interesting question. Is it necessity motivating them and they're more willing to get out and hustle for jobs?

When we look at LEP and not LEP, there's no statistical difference. And number four was another kind of counterintuitive surprise, low literacy. Folks with low literacy, again, a significant barrier to employment, wind up getting employment more than those who do not have low literacy skills.

So very interesting when trying to figure out what are the critical barriers you need to work on and how are you going to go about overcoming them? We have a second quiz that's related to this one. We should take a look at that.

MS. MCNEACE: Yes. Which group achieved higher average earning? Go ahead and put your answers into the chat feature. And for the sake of time, we've got 14 minutes, Bennett, let's just move to the answers.

MR. PUDLIN: Let's give them 30 seconds. I have a fast clock; that's good enough.

MS. MCNEACE: OK. There we go.

MR. PUDLIN: All right. So while Hispanics enter employment more often, they don't earn higher wages than non-Hispanics. The homeless not only enter employment, but they do earn higher wages. Folks who do not speak English as their first language get lower wages. They get more jobs, but they're poorer jobs. They earn less. And the low literacy skills folks, like the homeless, not only get more jobs, but they earn more money. So again, for me, this was not what I expected to see, but very important to understand. We can go to the next slide.

So just like we looked at InfoSPACE participants by dimension, we have an item called dimensional analysis, which shows you the different rates of the three employment outcomes by the same characteristics. The next slide, you may need to expand this, what you're seeing here is the entered employment rates for men and women. And you can see that women are 1.6 points more likely to enter employment than men; women up by 1.6.

In the next slide, you can see that when you just look at a single characteristic, it can be misleading. When we cross gender with rural, we see that women don't do better than men anymore. In a rural area, men do better than women by more than two points. And in an urban area, women do do better than men by over three points.

So it's a more complex story and you can use InfoSPACE to disaggregate the pool of people who achieve entered employment and those who don't and utilize that information to target your service delivery on those individuals with the combination of characteristics that are going to have the hardest time getting a good job.

In the next slide, I just wanted to share with you another counterintuitive piece of data from InfoSPACE. Again, these are the final PY '17 numbers. Low employment prospects, which is clearly a barrier to employment, by definition; right? This is a mega barrier to employment. We're talking about these folks being far more successful, both statistically and in real life, in getting the job than those who we say do not have low employment prospects.

For me, this raises the questions – well, several questions, but one of which goes to the quality of the data. How reliable are we in coding this information? And I want to make a pitch, because you know I couldn't get through a webinar without it. About the value of having accurate data. I think sometimes, we dismiss data as of no importance. It's just something we have to do and we don't see the benefit of it.

And so we don't pay enough attention to accuracy and data integrity. I hope you're getting the message that the data are here for a critical purpose, and that is to give you the tools to improve the quality of your services and to ensure that your customers get better outcomes. And if you don't have good data, then the data are not going to give you the tools you need. So I hope this will be an impetus for folks to take data quality more seriously.

Next slide, I did mention before that we're working on these participant profiles and we're going to use them for two purposes. We're going to use them to help you understand the characteristics of the participant pool, in general. But we're also going to use it to help you understand which clusters of characteristics produce better or worse employment outcomes. While we're doing that, until we can do that, you can use InfoSPACE to approximate it.

As we showed you before, when we cross gender with rural, you can combine two dimensions or two characteristics and give you a look that way. But you can also, when you're looking at individual participants and trying to figure out in their IEP what kinds of services and how intensively you want to work with them if they're in that second group that you've triaged.

If you look at folks who have two or more individual barriers, you're not getting the benefit of a true statistical cross-tabulation. But nonetheless, if they have two or three or four barriers that individually are shown through InfoSPACE to have a negative effect on an employment outcome and your participants got them, that's a pretty clear indication of what you need to do to help that participant out.

But I do want to share with you some very preliminary profiles that my partner, Ron Shaff (ph), many of you know he's the data guru, has been able to construct so far. So this is not going to come as a surprise to anybody. We saw it in the first slide when we looked at InfoSPACE. We looked at entered employment by age and enrollment.

Age has persistent effects on employment outcomes. With few exceptions, no matter what other characteristics we match with it, you're going to see a straight line decrease in the rate of entered employment. And that's true even when we use characteristics that by themselves have a powerful impact, like public assistance or education.

Second bullet is talking about education. There's a lot of variation within the education bands that we use. But one thing is pretty clear. Folks in the two lowest bands, that is those without a high school degree, are at a great disadvantage. And that should be a impetus for you to be thinking in terms of your service delivery model of how you're going to address that helping focus with adult ed, literacy, and GEDs.

But even when we deal with education and age, age still matters more. And across each of the educational levels that we track, the youngest age band with that level of education does 30 points better than the oldest age band with that level of education. That's consistent. So that's a really – you can't do anything about – you could do a lot about some levels of education. You can't do anything about age. But it's critical to understand the kind of barrier age is and how you're going to work with people who are older.

We looked at ruralness a few minutes ago. For most characteristics, when you add the dimension of rurality, that's probably not a real word, but it's going to further reduce the likelihood of entered employment. So participants on public assistance who live in rural areas do far worse than urban participants on public assistance. But since we're always looking for unexpected results, disability's an exception. When you cross disability with ruralness, the effective disability goes away.

People with a disability have a harder time getting a job than people without, but when you only look at people with a disability in rural areas, there's no statistical difference. When you look at people with a disability in urban areas, there's a big difference. And we see somewhat of the same pattern with veterans. Veterans overall do worse than non-covered persons in entering employment. But rural veterans do better than urban veterans.

And lastly, education. Education can mitigate ruralness. So increasing education levels from less than high school to high school decreases that negative effect from nine points to 6.5. And if you get someone an associate's degree, in this instance, it negates the negative effect of rurality altogether. But a caveat, that isn't true for associate's degrees. There are many instances where the associate's degree doesn't help at all. And it even appears to be a hinderance, so you can't generalize that.

One of the things that we were speculating on is why do we see this counterintuitive effect? You would think – one possibility is that folks with a disability in a rural area would have a harder time being accommodated. And yet, the opposite is true.

And why do vets do better? And one thing that occurred to us is that it's more person; right? It's less anonymous than an urban area and folks are more neighborly, are perhaps less isolated, and more willing to help in ways. Interesting speculation. We don't know why for sure, we know that this effect is real in some instances.

MS. MCNEACE: We've got two minutes left, Bennett.

MR. PUDLIN: Next slide. OK. So we made you wait this long to share the answers to the first quiz. Twenty-one percent of our placements were made with your assistance. If you want to know what you can do to increase your employment, this is not a bad place to start. It's all about employer engagement.

And if you ask the participants about it, remember, they gave us the lowest score in their survey for helping them find a job. So this is a two for one or a three for one. Increase your engagement with employers, your job development work. You're going to get more placements, you're going to make participants happy, you're going to make employers happy.

Placements with a host agency, almost a third. That's a very significant number and it should suggest to you that the care and feeding of host agencies is important and that selecting the right host agencies, including not just those with the capacity to provide a good assignment but those with the capacity to provide a placement, is really critical to satisfaction for customers and performance.

And lastly, self-employment. I'm not saying it never makes sense. There may be some folks for whom sending them to some entrepreneurial training might be useful. But in terms of bang for the buck, you're not going to get that overall. It may be worth doing at a third or fourth or tenth level when you've done the more critical things that are going to get you outcomes.

And with that, Michi, it's back to you.

MS. MCNEACE: Thank you, Bennett. We are out of time, so we did have another slide to talk about. We wanted to open it up for another discussion. But I have an option for you, because we are just carrying over to the next session in about 15 minutes. We might be able to open up that session with this open discussion. But right now, we are at the top of the hour, Bennett. So perhaps we can – if you want to take maybe a question or two and then wrap it up and call it a day?

MR. PUDLIN: Yeah. If they can leave the questions up so that folks get to see them as they're signing out, that would be great.

MS. MCNEACE: OK. Let me just give you one question and then just real briefly, and that one question is can you review quickly – well, no. That's not going to be a quick one. Here's one. "Are the participants better off with current training and experience just by the nature of being in the program?" Real quick, Bennett, 20seconds or less.

MR. PUDLIN: Yeah. Absolutely not. I think that most participants do benefit not just from being in the program but from the nature of the program. And it's really important for you to understand what the components are of the program that lead to that effect. And the survey is one critical way you can understand that effect.

So yes, it is true that participants love us and they tell us that their physical health hasn't deteriorated. They tell us that their mental health is better and they tell us that they really value the wages that they get while in the program. Those are all positive outcomes, but not everyone gets them. And they don't get them automatically. They get them because of the great work you do and we just want to make sure you understand what those components are that lead people to form that evaluation of you.

MS. MCNEACE: Great. Thank you, Bennett. So with that, we conclude our first session on performance. Want to thank Bennett Pudlin. It was a great session. I think I can walk away learning something new myself. We will take a quick 13-minute break and we'll be back at 3:15 for part two. Make those optional special requests work for you. Thank you, everyone.

MR. VEHLOW: All right. Thank you so much, Michi. I just want everyone to stay logged into the room for just a minute longer. Just provide us with some feedback through that feedback window. You can let us know what you thought of today's webinar. Please, take a second now to share your thoughts. Let us know what you liked or what we can improve on. There is also an additional conference window where you can let us know what you'd like to hear in future webinars.

Just a reminder, a recording of today's webinar as well as a transcript will be made available on WorkforceGPS in about two business days. So if you enjoyed this webinar, please go to the event page and click that white button. That is the thumbs up button in the upper right-hand corner of the screen.

But with that, we're going to leave you until next sessions in 12 minutes. So have a great day, everyone.

(END)