**WorkforceGPS**

**Transcript of Webinar**

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

**A Coordinated & Collaborative Partnership**

**SCSEP Delivery Model and Performance Part II: Make Those Optional Special Requests Work for You**

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

*Transcript by*

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LAURA CASERTANO: All right, welcome back to today's session. My name is Laura Casertano. If you need anything technically speaking, let me know in that chat box in the bottom left hand corner of your screen.

Please introduce yourself now. Even if you introduced yourself for the other sessions, please make sure to reintroduce yourself in that chat now. Also, any questions or comments you want to ask, make sure you put in that chat as well. We'll get to as many of them as we can. In the file share window in the bottom right-hand corner of the screen, you can find the PowerPoint for this session and the past two sessions. Make sure to download those if you haven't already.

Also, just a reminder, you can find a copy of the PowerPoints, the recordings and the transcripts of today's sessions on WorkforceGPS in about two business days. But now I'm going to move us right into today's presentation.

I want to welcome everyone to today's webinar and I'm going to turn things over to your moderator today, Michi McNeace with TwoTech, Inc, Older Workers Unit. Michi, take it away.

MICHI MCNEACE: Thanks, Laura. Welcome back, everyone. That was a quick 12 minutes, I'm sure. You guys, we're getting ready to get started with another great, exciting session called "The Systematic Approach to Grantee Service Delivery and Performance Part Two: Make Those Optional Special Requests Work for You."

In this session, we want you to understand and know that those optional special requests, as we see them, are precious gems. They're like a diamond in the rough. And what you're going to learn is what do you do with them?

This session is going to describe the purpose for the optional special requests, the primary too, OJE, and the additional – or I'm going to say ATSF and have you apply them to your program service delivery model.

Your presenters today will be, again, Mr. Bennett Pudlin with the Charter Oak Group and we also have LaMia Chapman, the unit chief for the Older Workers Unit for the Office of Workforce Investment, Division of National Programs, Tools and Technical Assistance.

Before we get started with them, we're going to open this session up with a poll. That poll is a great one. What is OJE? So the poll is going to come up, everyone, if we can go ahead and take that polling question.

OK. As you can see, there was no real correct answer for our discussion today, but those are some great questions and that was a great question with some great responses. So it seems like everybody knows what OJE is, as it relates to SCSEP.

Before I move on, I want to make an announcement that we will be ending this session at 4:00 promptly and we'll take a break between 4:00 and 4:15 so that we can prepare for the closing.

With that being said, I'll go ahead and hand it over to our presenters, Bennett Pudlin and LaMia. Bennett and LaMia. LaMia going to go first?

LAMIA CHAPMAN: Yeah. Good afternoon, everyone. I'm excited to discuss OJE with you. What is on the job experience, which is the SCSEP version of OJT, which is on the job training. I know when I speak about OJE's with other people out of the SESCP community, they look at me as if I've made up an acronym.

Then I explain to them that OJE is just like OJT and then I get an, oh, OK, OK. But just a bit of a background for you, for some of you. The current version of OJE was implemented by the 2000 amendment to the Older American Act in governance by the Older Workers Bulletin 0404.

All requests to implement OJEs are approved by the national office and in the – (inaudible) – optional special requests in the annual grant package. Personally, I find OJEs are essential or an essential component to the employment track of your service delivery model for those participants who have expressed the desire to work.

As we know – (inaudible) – get their soft skills training from their work experience assignment, which we know is our community service assignment, CSA. As our participants gain soft skills and employability skills, they are prepared to pass those skills, knowledge and competencies needed for employers to know that they can perform a specific job in the environment of their workplace.

On the job experiences are highly effective, because they use the existing workplace tools, machines, documents and equipment, which simplifies the process of adapting to a new work environment. For me, I see OJEs as a win-win.

The participants get all the preparation through the grantee and the host agency training as well as the OJE for performing a job that is typically provided to staff by the business and the employer gets a subsidy for a limited time to train our participants for those desired positions.

Now, as we see on the slide, when the employer gets the subsidy for the participant, it's for a limited time with the commitment to hire the participant, if the OJE is successful. In the employment track of your service delivery bubble, OJE is the only component of SCSEP that is specifically designed to provide participants training and preparation for the – (inaudible) – sector employment. Next slide.

These – (inaudible) – participants are likely to get a job in the employment sector or industry without the inducement up to the employer. For instance, greeters at Walmart, cashiers at CVS, etcetera, these types of jobs they can get on their own. But with the monetary incentive given to an employer for higher wage and skill positions, OJEs come in handy. Because you're selling – when you look at OJEs and you're selling the participant's skills to an employer with the understanding that both parties have a trial period to ensure good match.

So want to make sure you can use the inducement to obtain a job at their highest wage and skill levels. OJEs require careful targeting of participants and employers and the understanding of the local job market. That's why choose an appropriate host agency coupled with additional training from the grantee will almost always ensure our participants will obtain the necessary employability skills needed to get employment.

I will also add if you partner those activities with adding a short term credentialing component, this can lead to a very successful outcome for both of you.

I'll give you an example. If you have a participant that comes into the program expressing a desire to work in the daycare field or even running one of their own or owning one in the future, what you could say for opening one in the future, I would recommend that you find a host agency in the daycare field.

It would also be recommended to have the participant get an industry recognized credential, one in short term, of course, because of the timeframe of the program, in that area. Once the program has determined he or she has obtained the experience and mastered the necessary employability skills, the next step would be to find an employer who is willing to partner with your program to do an OJE.

Another example could be used for the tech industry or the automotive industry or whatever. The point is that there is a variety of ways that you can structure your service delivery model to include OJEs, but OJEs should not be used for employers who would normally hire our participants without it.

We want to make sure it's the best match. Next slide. As I stated before, throughout our me being here with the Older Workers Unit with SCSEP, we are in process of retiring the Older Workers Bulletin and, well, not retiring, expending it, and issuing a TEGL on OJE. The OJE TEGL will include some changes to the mechanics of a crime for and using OJE to streamline the process. It will be required for justification of use, because in the – (inaudible) – capture data on OJE and its use.

So with this, I will hand it over to Bennett to discuss the rest.

BENNETT PUDLIN: Thank you, LaMia, and could we have the next slide, please? So LaMia ended on data and I'm afraid I do not have any good news for folks today about the OJE data. We've been tracking OJE data for the last five years and the first concern we have is that the data are still not reliable.

Every year, at the end of the year, we send grantees that have recorded OJEs in Spark a list of all of the records for OJEs and ask them to verify that those records are properly coded and year after year, we learn that they weren't.

And the error rates can be pretty high. The percentage of – and the way we identify potential data problems as we look at OJEs that were recorded as taking place during the CSA and then we look to see whether that OJE led to a placement, because the requirement of the program is that the employer had to hire the participant when the OJE is over, unless the OJE failed for some reason.

We're anticipating placement rates of 90 percent or more and instead what you can see is we've gotten placement rates from 42 to 76 percent over the last five years and this year, it was 64 percent. So we have a long way to go and it is a training issue. Some of you been around for a while may recall that the inspector general did an audit of our recovery act grants going back to PY10 and found that every one of the OJEs that they sampled for that assessment was inaccurate.

And it turned out that by sheer luck, they had sampled subgrantees where the staff thought that every host agency was automatically an OJE. So they checked the box for OJE for everybody who was assigned.

It's not that bad anymore, but we're still seeing a lot of miscoding of the data. Why does that matter? For those of you who were here last time, if we can't trust our data, then we can't use the data to figure out what's working and what's not working, so we've got to do better.

The other disappointment is that the use of OJEs has been very low. Over the last five years, it's height was in 2013 when three percent of all placements were due to OJEs and it went down to 1.1 percent this year and it sort of fluctuated in between there.

It's so small as to not really matter when we're talking about 9000 or 10,000 placements. Clearly this is an underutilized – if it's a gem, we're keeping it a secret to ourselves. The biggest shock to me, in doing the analysis of the data, is over this five-year period participants who have received OJEs average .71 an hour less than those who got placements without OJEs.

I underlined less so I had to remind myself that wasn't an error. That's just inexplicable to me. LaMia said that the purpose was to – one of the purposes of OJE was to get people jobs at their highest wage and skill level and yet we're using OJE to get people jobs that pay less than the average participant gets without it.

Then finally, this goes again to the success rate of OJEs. Because the parties have had a trial period, we would expect that anybody who was ultimately hired at the end of the OJE would last long enough to get counted for entered employment. But when we look at the difference in entered employment rates for those who had OJE placements and those who didn't, the difference was less than a point. Probably not statistically significant.

So that too is kind of not what we would expect. We would expect the jobs to pay more, to be at a higher skill level and to last longer. Yet that doesn't seem to be the case, so for me, what this is saying, is that we've not been very intentional in our use of OJEs.

I think LaMia has given us a good formula for what it is we need to look at in terms of which participants we're targeting, which employers we're targeting, which industries we're targeting. So I guess it's back to you, Michi.

MS. MCNEACE: Thanks, Bennett. I think that's some great discussions and suggestions and comments that both you and LaMia made. I just want go back to the TEGL process that LaMia talked about briefly.

So you're saying that the new TEGL will be coming out to replace the Older Workers Bulletin 0404 and the TEGL, the purpose for the TEGL is that you feel that the TEGL will refresh Older Workers Bulletin 0404, correct?

MS. CHAPMAN: That's correct.

MS. MCNEACE: And as part of that TEGL, the guidance will come out where it'll have fresher expectations and part of those expectations, that you'll be asking grantees that you'll submit for OJE is to be more intentional when applying OJE, correct?

MS. CHAPMAN: (Inaudible) – intentional.

MS. MCNEACE: (Inaudible) – to their service delivery model?

MS. CHAPMAN: Correct.

MS. MCNEACE: OK. So that TEGL is going to guide them on how to do that?

MS. CHAPMAN: Exactly – (inaudible).

MS. MCNEACE: Wonderful.

MR. PUDLIN: Yeah. If I could just add to that, Michi, I would say that if I were applying for an OJE and had used it in the past, especially, I'd want to be able to account for the results I got and I would imagine that if you haven't used it, you're going to be asked to talk about the results you're expecting to get.

So I think it's really important that people think about what information and data they have available to help plan a good OJE program and make sure that it's carried out correctly.

That the folks in the field understand what the program purpose and requirements are.

MS. MCNEACE: Great. That's a great segue, because now we want to open it up to an open form discussion. Let's chat. Let's do a little chat about OJE in the chat feature. So we have some questions that we would like to ask real briefly.

And question number one, what barriers have you encountered using OJE?

MR. PUDLIN: I'll take a first crack, LaMia. I'm sorry, that's a grantee question. Forgive me.

MS. CHAPMAN: I mean, you could go ahead.

MS. MCNEACE: You know, grantees in the chat feature please respond and Bennett is going to join you. It's an open dialogue between us and our audience, so –

MS. CHAPMAN: But we do have a question right here, now, you want to ask that one? Number one?

MS. MCNEACE: Oh, so while we're waiting for that, we did have a quick question that came in and said, "Am I correct that a host agency cannot do an OJE?"

MS. CHAPMAN: You're absolutely correct.

MS. MCNEACE: Bennett, do you agree?

MS. CHAPMAN: Did we lose you, Bennett?

MS. MCNEACE: I would like to say Bennett would agree. OK. All right, we're getting some – we're going to throw out the second question.

Second question is, "How do you decide which participants get OJE and what use do you make of IEP? And if you could throw in what can make your targeting of participants more effective." Bennett, you're back?

MR. PUDLIN: Yes, sorry. I dropped the call.

MS. MCNEACE: OK. We're getting some responses in, Bennett. And LaMia, you can see those?

MS. CHAPMAN: They look small, but yeah, I'm trying.

MS. MCNEACE: Corporations require OJE contracts to go to their legal review. Often we never get beyond that barrier, so that's a big barrier.

MS. CHAPMAN: Yeah. That is a big barrier.

MS. MCNEACE: We're going to mark this and move on to the next, because we have another question. "How do you decide which employers get OJE? What you make of labor market information? What's the employer's history of successful placements with you? What can make your targeting of employers more effective?"

I like that, educating business solutions about OJE for speed set.

MS. CHAPMAN: Yes. That's working without partners.

MS. MCNEACE: We have a grantee that says they select participants who have drive and determination.

MS. CHAPMAN: Motivation is key.

MS. MCNEACE: We have one that says we find that national businesses do not like to deal with particulars of the OJE, mostly –

MS. CHAPMAN: (Inaudible.)

MS. MCNEACE: Someone asks, they said participant that needs a leg up to consider employment, so that's one of the ways they select it. How about, "How do you track the effectiveness of OJE?"

MS. CHAPMAN: Do you mean how they internally track their effectiveness?

MS. MCNEACE: Yes.

MS. CHAPMAN: So that they can come up with different ways of actually implementing the process?

MS. MCNEACE: You know, if you've worked with certain employers, things are not working out, what do you do? What's the next step? How do you kind of –

MS. CHAPMAN: That's a great question.

MS. MCNEACE: Go down a different path? Is that correct, Bennett? And our next last is how do you ensure the accuracy of OJE data? As you heard Bennett mention earlier about the data, how do you, grantee, ensure accuracy of your data?

MS. CHAPMAN: I see the question come in, the problem, that question?

MS. MCNEACE: "A problem I have with the current OJE is that participants have had a couple of sick days and the OJE is for four weeks. Can that ending date be renegotiated?" I'm jumping up there to say I don't see why not.

MS. CHAPMAN: I don't either, unless your contract, the contract you all developed, stipulates otherwise. I think that's the flexibility of it, but also, in looking at that, you have to look at the type of participants you are targeting to put in OJEs.

Remember, we are talking about those who have successfully obtained life skills, as we talked about earlier yesterday. Life skills and employability skills to make sure that they have mastered those and are able to negotiate those conversations with the employer. That's important.

MS. MCNEACE: Oh, that's great. Great.

MR. PUDLIN: Yep.

MS. MCNEACE: So this is some great discussion. Bennett, are you back? We're going to –

MR. PUDLIN: I am, yeah. And I agree with LaMia. I agree with LaMia completely. I would just say you want to make sure that your approved OJE program allows for adjustments like that, right? It's a perfectly reasonable thing.

It's got to be in your program design and it has to be in your contract with the employer that allowance can be made for sick days and that extending it would not be a problem. The bulletin currently allows you to go up to 12 weeks.

So if that's what your grantee's program allows, then you've just got to have flexibility in your contract.

MS. MCNEACE: Great. One question before we move on and that is, "Can an OJE program pay training wages in excess of minimum wage?" Which one of you would like to take that?

MR. PUDLIN: I think I can answer that as well. Yes, the answer is yes.

MS. CHAPMAN: Yes.

MR. PUDLIN: Typically, if the employer – most people are paying the wage rate that the employer has advertised that job for. So if you're going – being trained for a job as a technician and it's posted at $13 an hour, that can be your training wage.

It's not required to be, but I think you'll find that most grantees using OJEs use the going employer pay rate as sort of a prevailing rate for that job and allow it during the OJE period.

MS. MCNEACE: Great. Thank you, Bennett. So what we're going to do now is we're going to move on to the next most exciting topic.

MS. CHAPMAN: Yes.

MS. MCNEACE: And we're going to start that off with this poll. What is ATSS? There's a question. There's a question and the answer. All right. It's rolling. You know what? It's – I don't know what to say right now, but it's exciting.

It's exciting, I like the answers. They're coming in and it seems like number four has taken the lead and number four answer is additional training and systems services. So with that, we're going to go ahead and move to the next slide.

I'm going to pass this over to LaMia and I think in her next slide, she will give you the correct answer.

MS. CHAPMAN: Yes. What is a ATSS? Additional training and supportive services. Close. We threw a trick question in there. My apologies. Just wanted to make sure you all were staying awake as we close out.

So ATSS allows grantees to reduce the amount of grant funds that must be spent on participant wages and fringe benefits from 75 percent to as low as 65 percent. Using ATSS in your service delivery model should be used for those who want to work and is used to enhance the skills that have already been obtained or in the process of in your job readiness and employability components.

So ATSS was created by 2007 amendments to the Older Americans Act and governing by the annual TEGLs that are requested or that are announced and requested for grant renewal. All requests are implemented and approved by the national office and is a part of the optional special request and the annual grant applications.

Using ATSS allows grantees to spend up to an additional 10 percent on training and supportive services for participants that is in addition to the training funded by the 11.5 percent of the grant designated for OPC, which is other program calls.

Next slide, please. How should ATSS be used? ATSS should be used to enhance and supplement your employment track and your service delivery model. These funds are used to pay for additional training and supportive services for participants who have a desire to work and want skilled training to be competitive in the job market.

The intents for using ATSS is arranging skills training. Training to enhance our participants' suitability to compete in the competitive job market. This is very competitive job market, so you want to give them a leg up. The job readiness and employability component of your service delivery model, which has our community service assignment should be used to address their life skills and soft skill needs and barriers.

ATSS should be targeted to participants who can really use this extra training to submit their desire to work by obtaining an industry recognized credential to compete in today's market. And since the program has a short time span, these credentials should always be something that's obtainable within a short period of time.

When applying for ATSS, it is almost, in most instances, before the grant year starts. So it's incumbent upon the program to have researched and know how these classes will impact outcomes for the program and support the participant's desire to work.

The design and delivery of the training should be informed by the research and best practices and I can't emphasize that enough. As you all go into the following year, this year when you prepare for your grant packages to be submitted, your understanding and ideas and design of how you want to implement skill training should flow.

It should be articulated. You should already know what you want and when you submit that, you should have it all written out. But I will hand it over to Bennett who will give us some additional important information.

MS. MCNEACE: So before Bennett jumps in, I want to ask you a question. So what you're saying is that when grantees are submitting their optional special requests for ATSS, what you're looking for, which will be described in the new TEGL that you're going to be looking at progression.

So if they have multiple years of using ATSS, you're looking for what are the outcomes from the previous year? Is that what you're saying as well?

MS. CHAPMAN: Yes. That's correct, because in the next slide you'll see –

MS. MCNEACE: So a new TEGL is in process?

MS. CHAPMAN: Yes. Now, this one is really long awaited and yes, a new TEGL will be in process. We are going to get it out this year and grantees can request for this option, but it will require – now, this is a previous use of ATSS, and realistic expectations for improvement and performance on employment outcome measures without sacrificing the performance of other measures.

MS. MCNEACE: OK, great. So reliable data is going to be very essential that Bennett is going to talk about. So that TEGL will outline the steps of the requirements and expectations of what a grantee needs to do to submit a request that – a successful request.

MS. CHAPMAN: That's correct.

MS. MCNEACE: OK, great. So with that, we are going to go to Bennett to tell us what do we know about the use of ATSS?

MR. PUDLIN: Well, that's easy, Michi, because we don't know a whole lot. Unfortunately, unlike OJEs, we do not track any data on individual participants who have benefited from ATSS training or supportive services.

We will be fixing that in the CMS and as Steve told us at the beginning of the conference, we're looking to kick that off the beginning of the next program year and there will be a – any time there are fields in the CMS related to training or supportive services, we will also have a check box to indicate if those particular services are being provided through ATSS.

So I'm hopeful that in a year, we'll have enough data that you can provide some useful guidance. In the meantime, what we do have is the aggregate performance of the grantees that have used ATSS.

We can't look at individual participants who have gotten it, but we can look at grantees who have used it and over the last four years, 31 different grantees have used ATSS. The high number was 27 four years ago and last year it was down to 12.

Of those 12, only three were state grantees. So the national grantees have been far more consistent in their use of ATSS than the state grantees. So when we look at those 31 grantees that used ATSS at any time in the last four years, 12 of the 31 used it again in '17.

And they fared a little better, overall, in their performance than the 19 grantees out of that 31 who didn't use it last year. But interestingly, the entered employment rate for the 12 that used it was actually lower than for the 19 that didn't.

Average earnings were somewhat higher, by $374. That's around, what, five percent increase over the average. And their service levels were 2.8 points higher than the 19 that didn't. However, when we look at last year and examine all 31 of the grantees that used ATSS in any of the last four years, as a group those 31 had lower nationwide performance than the average grantee.

Their entered employment rate was only 88 percent of the nationwide average. Their average earnings were only 97, 98 percent of the nationwide average and their service level was only 94 percent of the nationwide average.

So when you go back and think about what LaMia said about the purpose and target populations and the kind of jobs and the skill level, it seems pretty clear that in the aggregate, we have not been acting in a way that is intentional.

We have not been focused on the critical components and purposes of ATSS, at least as reflected in the aggregate data that we can look at right now. Again, I hope we'll come back in 18 months and be able to give you a much more granular picture of what's going on.

But right now, I'd have to say that we've got to have a reset and if I were applying for ATSS next year, whether I had used it in the past – well, if I used it in the past, I would definitely want to explain what I thought went well and where it was less successful.

If I haven't used it in the past, I'd want to show that I've really done my homework, that I've targeted – that I'm prepared to target participants very carefully, that I know what industries we're preparing people for, that I've identified my training and training providers with a track record and that I can point to something in the research for the labor market analysis or accepted best practices that gives me a likelihood that this kind of training delivered in this way is actually going to work for my participants.

The critical thing is not all training works the same way for all participants and you have to target it. So that's my takeaway from the limited data we have. Thank you.

MS. MCNEACE: Great, Bennett. Thank you. So we're going to move on quickly and ask a couple of questions during an open discussion. So we're there, so one question we would like to ask is how do you decide which participants get ATSS?

If you can put your answers into the chat feature, that'll be great. And the last question we will ask is what barriers have you encountered using ATSS? We're seeing some comments coming in. All right.

I do have a question that came up. It says can ATSS be used for other support than training? Use it for supportive services rather than training or are we just discussing training now that other services will be addressed?

MS. CHAPMAN: Well, yes. ATSS can be used for just supportive services in addition to what you already provide. It can also be – once you've checked in with your partner agencies or filed, if you can't find anyone who could assist with those other resources, then yes, you can definitely add that to your ATSS request for just the supportive services piece.

MS. MCNEACE: OK. Thank you, LaMia. For the sake of time, what we're going to do is just go ahead and move into the wrap up session. I know ATSS is a hot topic and this is not the first time we will be doing any type of session or presentation.

So for now, we're going to go ahead and wrap this up. So I'm going to toss this back to Bennett.

MR. PUDLIN: Right, so yeah, I think it's pretty obvious that while the new TEGL will be very helpful, I'm sure, our history has been that things move slower than we would wish, getting through the clearance process.

There's no guarantee we're going to get it in time for next year's grant applications, but the good news is you don't need it, I think, to tell you how to submit a request, even for OJE or ATSS, that will be successful.

I think you've heard enough today and enough information will be available to you from the materials that you know what DOL is looking for and I'm sure if you need help, that your NOL or your FPO will be able to assist you with that.

The key, though, is to really start thinking about it now. Believe it or not, spring is right around the corner and you're going to be filling out those grant applications. You should be designing it, as LaMia said.

You've got to have the design in place at the time you submit your application. You can't expect to get the approval on the promise that you'll figure something out on July 1.

MS. MCNEACE: Great. Thanks, Bennett. We want to do a quick poll before we end and that poll is how many of you think you will submit a special request for PY19? Whether ATSS or OJE?

OK. Those are some good numbers and I would also like to ask, before we really completely wrap up, if you could put it into the chat session and if you could just type in what additional supports do you need to be able to submit an approvable request?

Just throw that into the chat session. We'll capture it later. With that, we have – what we'll do, we have some questions that came up. Because of timing, what we'll do is we'll be responding to those questions at a later date.

We do plan to put together a Q&A fact sheet from all of our sessions that we will be posting on the COP. So with that, we want to say thank you everyone. We apologize that this session was cut short.

Unfortunately, we're going to have to move on to our next one and thank you all and would you please – John has something.

JON VEHLOW: Well, it's just going to be a 15-minute break and then we'll have our closing and wrapping session. So this is just a break. We're going to leave the room up, but go get a glass of water, use the bathroom.

MS. MCNEACE: And if you want to continue to put in your answers in the chat session during that break, that'll be perfect, because – or have any additional questions, just keep on filling up that chat session.

OK. So what we're going to do is just put you all on mute and we're going to just kind of take a break.

(END)