**WorkforceGPS**

**Transcript of Webinar**

**Assessing Your Progress at the Mid-Point of Your America's Promise Grant - Part One**

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*Transcript by*

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LAURA CASERTANO: Welcome everyone, to today's webinar. My name is Laura Casertano and I will be here for you, technically speaking. Hopefully you will not need to hear too much from me. If you do have any technical questions or concerns, just go ahead and let me know in that chat box on the bottom left hand corner of your screen.

That chat box is also where I'd like you to introduce yourself now. I do see that some of you have done so already. If you haven't, just go ahead and let us know your name, the name of your organization, where you're located in the country and how many are joining if you are joining in a group.

That chat box is also where we like to ask any questions or make any comments about today's session. We would love to hear from you and we will get to as many of them as we can. You'll also notice in that file share that you can download a copy of today's PowerPoint as well as other resources.

So you can download that at any point throughout today's session. Also, you can find a copy of the PowerPoint, those resources, the transcript and recording of today's webinar on WorkforceGPS in about two business days.

One last thing from me before we get started. I wanted to mention the feedback survey that is going to be emailed to everyone immediately following today's session. That survey is completely anonymous and will give you an opportunity to provide your thoughts and feedback and we use that feedback to make these webinars more useful to you in the future.

So please don't forget to fill those surveys out. You will get one feedback survey emailed to you immediately following today's session and then you'll get another one a month from now. Please do not forget to fill those out.

With that, I'm going to move us right into today's presentation. I want to welcome everyone to today's "Assessing Your Progress at the Mid-Point of Your America's Promise Grant, Part 1" webinar.

If you haven't done so already, please introduce yourself in that chat on the bottom left hand corner of the screen. Again, if you're joining us a little bit late, please introduce yourself in that chat.

With that, I'm going to turn things over to your moderator today, Greg Scheib. He's the America's Promise federal lead at the U.S. Department of Labor, Division of Strategic Investment. Greg, take it away.

GREG SCHEIB: Great. Thanks, Laura. Good afternoon everyone. It's great to have you here. I was just thinking it's hard to believe that we're actually two years in, halfway through our four year grant cycle, but here we are.

Thank you all so much for all the work that you all have done up to this point. We've got a lot of fun stuff coming up and this is a good opportunity here at the mid-point of the grant to take a step back and kind of look at what we've accomplished and where we're going to be headed over the next two years.

Now, you may recall that back in December, we rolled out a number of key program success factors that kind of frame how we think about our programs and support each program in meeting your individual goals.

This mid-point assessment that we're going to be talking about today is really going to build on those key programmatic areas and it's going to provide you the opportunity to reflect on where your grant is today and where it can be two years from now.

Today, Bruce and Heidi are going to walk you through the assessment tools we've developed, how your coach will be working with you to complete the assessment and also how you can use that information to inform your programs moving forward, and of course this is also a prelude to the second half of this workshop that we're going to do in about a month, month and a half.

So thank you again for attending this afternoon and I am going to turn it over to Bruce Rankin.

BRUCE RANKIN: Great. Thanks, Greg. And just a real high level review, I'll be introducing today's tool talking about how we plan to use that and as Greg mentioned, Heidi is going to be revisiting the success factors and how we hope those will be helpful for you and your grant.

So as far as today's objectives go, we've created a real simple tool using a Microsoft Excel template that provides both quantitative and qualitative assessment measures that we'll describe in the next slide.

We'll talk about the process that we hope to follow and the role that the coaches will play, and if you hear me say this once, I'll probably say it a few times. We understand how busy you are and we see this as an opportunity to improve our technical assistance, so we're hoping the coaches do the heavy lifting here.

That this is an exercise for us to help you. Then, as Greg mentioned, there's a second part to this. We'll talk a little bit about how we hope to use this information, these observations and again, to improve the technical assistance and also help you with the final two years of your project.

Lastly, the other thing that we'll try to reiterate, today's presentation, unfortunately is us talking to you, but you may have some questions along the way and as Laura mentioned, we've got the chat box in the lower corner.

Please feel free, at any point, to pass along any questions that you have. Those pop up on our screen here and we'll just address those as we proceed through the webinar. Great. So the tool. Maybe one back? Yeah. That's it. Sorry, I'm sitting here, I am the one that's off kilter.

So this eye test that we've just put up on your screen, as Laura pointed out, we have copies of this tool. It's an Excel spreadsheet, two pages, quantitative measures that align with the original metrics that were outlined in the funding document.

Again, that allows aligns with what you've proposed in your grant originally and any modifications you've made. What this captures, again, are the total number of participants served, the target and other populations.

Those who have enrolled in the program, the numbers who have completed, credentials attained, the employment outcomes for those people that are incumbent workers, how they've advanced in their occupations and then we're also capturing those entered wages.

Again, it was drawn from the original document. What we've done with the two files that you can download over there, one is the blank template and the second one actually has sort of hypothetical data, just to show how it works.

The numeric, or the quantitative page, is a formula and there are instructions in there that explain what we're hoping to capture, but all those numbers roll up automatically once you put your original goals and current data to date or at the midyear point.

I'm just trying to think if there's anything else on that, before I turn it over to Heidi, who is going to go back to the success factors and talk about those qualitative measures that we're hoping to capture. Heidi?

HEIDI SHEPPARD: Thank you, Bruce. Hi everybody. The success factors that we introduced late last year are in a PDF that you can download from this, from the file share, so I would suggest that you do that, because they contain more details than what we're going to cover here.

But briefly, I'll just tell you about each of these six success factors. Starting with the first one, which is strong organization managements and I'm sorry, that means having qualified management and staff, having regular communication and employing project management tools.

Let me just backtrack for a minute, because I wanted to – many of you weren't on the webinar in which we introduced the success factors. These were developed in cooperation with DSI, the TA coaches for America's Promise, and the FPOs.

It takes into consideration the documents that were originally used for the – for when you wrote your proposals and so they're based on some real information and they've been collaboratively developed and the purpose is really to help you be successful.

Going back to the success factors themselves, the second success factor is strong operational systems and that means having data collection tools and using them well in order to employ data driven decision making and ensure continuous improvement.

The third success factor is sustainability thinking, which involves having a plan to continue the work that you're currently doing, which includes understanding your partner's needs on an ongoing basis and engaging them in the program and communicating with them.

The fourth success factor is effective employer engagement, which means that you're engaging multiple employers in your industry sector, designing career pathways that align with their needs and goals and ensuring that the employers offer hands on experiences for your participants.

The fifth success factor is effective partner engagement, which includes engaging in regular communication with all your partners, leveraging their resources and abilities and coordinating their activities with regards to your program.

The last success factor is effective participant engagement along the career pathway, which is really the capstone to all of these success factors. It includes conducting effective outreach and recruitment, developing onboarding processes and vetting for participants into the program.

Developing a case management approach, providing quality training services aligned with regional and sector based labor market needs, evaluating training design and services, matching participants to jobs, providing appropriate supportive services to address challenges and monitoring them for continuous improvement.

So as Bruce mentioned, this was not meant to be an eye test, so you can download a copy of both these forms to get a better sense of what we hope to collect.

MR. RANKIN: Just one real quick thought before we go to the next slide. Just to get on the basic design of the template itself, hopefully it's self-explanatory, but the thought behind it is call it a gap analysis or needs assessment, but we try to put in black and white what your original goals are, as best we can tell as coaches, where your progress is at this mid-point and then where the collaborative effort comes in, and I'll talk about it in a second, is taking a look at those observations and what, if any, plans or corrective action need to take place.

MS. SHEPPARD: OK. Back to Bruce to outline the process.

MR. RANKIN: Super. So as I mentioned before, we understand how busy you are, and our thought is that the coaches – and I'll use myself as an example. I've had a good relationship staying in touch with the grantees that I work with, have a good sense of where they are overall.

And so once the midyear data is available on February 15th, I'd like to think from that data and all the calls and other interactions that I've had with my grantees, that as a coach I should be in a position to be able to complete that assessment, both from a quantitative and qualitative point of view.

The reason we go through this process is that after a while, we sort of get a nationalized sense of where things are, that this just focuses everyone's attention. Here's where we should be. Here's where we actually are and then highlight that and begin the discussion.

So the first step is for the coaches to complete the templates and that process can begin immediately, but we recognize that your midyear performance data isn't due until February 15th. So with that in mind, we're giving the coaches until the 19th to enter that data, update anything that might be reported as part of your quarterly narrative reports and on the 19th, get those completed draft templates back to the project directors.

From there, what we'd like the project directors to do is take a look and validate, update. There's likely going to be some questions or some blanks and hopefully that will be relatively easy to address.

But if we can get that information back by the 25th, that will allow us time to mine that data, review it and what we're going to be looking for are kind of a combination of things.

Our expectation is that, for the most part, there won't be any real surprises, but we're interested in knowing how grantees have faced challenges, how they're addressing those and how that might affect their plans for the next two years.

From that information, that'll help inform the technical assistance and the priorities that we identify for our TA plan. So that process will take place between the 25th and March 7, which is tentatively the date that we have set for part two.

The one last piece of this process, where we talk about highlighting the strategies and so forth, as much as Heidi and Greg and I love to talk, what we're hoping is that part two really is going to involve the grantees.

That's you folks highlighting how you've addressed these challenges, identified them, created contingency plans, modified your grants and through that process, and we've seen this in the peer to peer conversations, help your fellow grantees if they're facing some of the same challenges.

So that'll be part of the process between the 25th and the 7th, reaching out and we're hoping that we can get a number of you to participate in that part two. Super. And again, any questions along the way, please let us know in the chat box.

So this is kind of my little philosophical thing here and I won't go through the quotes at all, but the bottom line is that if, just by going through this process, we're hoping that it's helpful for everybody just to refocus, get sort of, if you will, a stand back for a second and assess your progress and from there, use that information to improve your overall project and help everybody achieve their goals.

Greg, I don't know if you wanted to add anything there. We talked a little bit about, again, reiterating that this is the coaches driving this process and we're hoping that this is helpful for the grantees.

MR. SCHEIB: Yeah, absolutely. I mean, we've developed this and the reason we've offered it is we want this to be a tool for you all to use as a self-assessment. We're not using it in any other context than that, so obviously many of you are already working closely with your coaches and so this is an opportunity to just put some of that to paper and, again, sort of take a look at it.

MR. RANKIN: Right. And the term that Greg used the other day, when we were preparing for this flawlessly delivered webinar, is there are not gotchas. I think what he pointed out there is important to note.

That this isn't any – this is not a monitoring exercise. Again, it's meant to help you and help us as coaches. With that, Heidi had inserted sort of an update just to go over sort of what that dividing line, the firewall between the role of the FPOs and what our coaches are delivering.

MS. SHEPPARD: Right. So I just wanted to bring this to your attention, again, the different roles that the TA coach takes on versus what the FPO takes on and to show what kind of support each can provide to you.

As you can see, your TA coach is meant to assist you with regards to program implementation, organizational structure, participant outreach, providing services, training design and employer partner engagement.

So if you need any help in those areas, your TA coach is the one to call on. The other topics, you can see on the left hand side. Those are the things that you would reach out to your FPO for guidance on.

MR. RANKIN: And so should any of this lead to the decision or the desire to create a modification or in any way restructure your project plan, that's where we step aside and we turn it over to the FPO in the national office. So that wasn't too hard.

MS. SHEPPARD: It was short.

MR. RANKIN: It was pretty short and sweet. Again, we're looking if you have any questions. The other thing I'd ask is if everybody has a second, if you have any feedback. Do you think this might be helpful?

We're hoping it is, but again, we're seeing this as potentially helpful for you and as our team looks at where we prioritize our resources and our activities, getting a better sense of where each of the grantees is will certainly help inform our overall TA plan.

The only other thing I had here was just a reminder about the downloads, the PowerPoint and the sample forms and the data that you'd actually be able to read, that we put in there in the sample pool.

MS. SHEPPARD: OK. Seeing that there aren't any questions, just wanted to ask you to save the date or the time, because there are no specific dates in there.

MR. RANKIN: You can tell how this has been developed on the fly, but right now, we tentatively have March 7 for part two, and again, the dates are the 19th that we would get the completed templates to the project directors, the 25th from the project directors back to us, and then between the 25th and March 7th, where we have an early March up there would be when we mine the observations and then reach out to various grantees to see who might be willing to participate in that second update.

I don't know, Greg or Heidi have any specifics on the data driven decision making webinar. If that date has been finalized.

MS. SHEPPARD: It will be in the spring. Possibly in April. So stay on the lookout for that invitation coming your way in the spring and –

MR. RANKIN: It'll also – the data driven decision making was – is going to be similar to what we did towards the end of last year and it'll be a nice opportunity to take a big picture look at the whole program and how the whole program as a whole is coming along.

So it's going to be a nice counterpoint to the self-assessment that we're talking about here today.

MS. SHEPPARD: And the, uh, third bullet point there are infographic templates that will be coming your way later in February and that will be an infographic for each grantee that will illustrate your project and more details on that to come.

So stay tuned for that. And then finally, of course, the community of practice, we encourage you to use that, which is because, of course, that's where all our resources are stored and articles and blogs and webinar recordings, etcetera. So please use that. That's your community.

MR. SCHEIB: So, wow, that was fast.

MR. RANKIN: That's right. We should get bonus points, if nothing else. We're giving everybody more than 30 minutes back in your day. But again, if there's any feedback, if you can provide that to us, I know the meat of this opportunity is really going to come in part two where – I think we're generally thinking we won't be surprised.

Everybody here is doing really well, but the – going through the process, we hope, again, will help you and help us deliver better technical assistance.

MR. SCHEIB: Certainly, and I think what the coaches, I would imagine, will be reaching out to each of you to follow up and see where they can help with this process.

MR. RANKIN: Yep.

MR. SCHEIB: Wonderful. Well, thank you all very much. We appreciate you giving us your feedback for today and we will put out an executive summary and of course this will be available in a few days on WorkforceGPS.

Thank you all. Have a great afternoon. We'll talk to you soon.

MS. SHEPPARD: Thanks, everyone.

MR. RANKIN: Yep. Thank you.

MS. CASERTANO: All right. I just want to thank the presenters. I'm going to have the participants provide us some feedback. There are several polling questions on your screen. Please take a second to select and answer those questions and leave us some feedback.

Also, a reminder that you can find a copy of the transcript and recording of today's session on WorkforceGPS in about two business days. Also, please do not forget to fill out that feedback survey that's going to be emailed to you immediately following today's session.

With that, have a great rest of your day, everyone.

(END)