**WorkforceGPS**

**Transcript of Webinar**

**H-1B America's Promise Grant**

**Data-Driven Decision Making: Using Data for Strategic Planning**

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GRACE MCCALL: Welcome to "H-1B America's Promise Grant, Data-Driven Decision Making: Using Data for Strategic Planning." So without further ado, I'd like to turn things to our moderator today, Greg Scheib, America's Promise program lead, U.S. Department of Labor. Greg?

GREG SCHEIB: Thank you very much, Grace. Welcome, everyone. Nice to have you all here. I hope you all had a chance to take the poll that was up just a moment ago. But taking a quick look at it, it looks like we've got most of the program directors on the line and some case managers, which is great.

Obviously, the topic today is certainly of interest to all of us, and we're really happy to have you all with us today. Today we are going to take a look at our AP performance here at our two-year mark. We're going to be looking at how data can inform you program design and implementation. You're also going to be hearing from one of your colleagues about how they're using data to monitor their grant process.

And to wrap everything up today, we're also going to be talking with our evaluation team, who's going to be sharing a little more information about the national evaluation which is underway and answer any questions you may have. Before we get started, I'd just like to go ahead and introduce our speakers today. We've got Timmy Dudley and Kevin Mauro, who are our H-1B performance leads from ICF and High Impact Partners, respectively. We also have Deborah Waymire, the chief operations officer for Region 4 Workforce Board in Lafayette, Indiana, who's going to be talking a little bit about their process in using data.

On the evaluation side, we've got Megan Lizik, who is our evaluation team lead. And with her today from Mathematica are Rob Santillano and Jill Berk, who are going to be able to answer your questions about the evaluation and what that's going to look like over the next couple of years. So with that, we've got a lot going on so I'm going to pass it over to Kevin, who will start us off today.

KEVIN MAURO: Good afternoon, everyone, and thank you for joining us today. Some of you know me from past webinars. And I've always said, performance reporting is the most important part of your H-1B grant. Of course, as you know, I'm biased as a performance person. But that said, well, performance is always an in-demand topic of interest. The focus of today's webinar is a little bit different. After today's webinar, we hope you will walk away with some of the key takeaways from our objectives of today's presentation.

First, we'll review the America's Promise mid-grant performance data. Then we will talk briefly about how to use or tailor a data analysis tool that you can use to track your quarterly outcomes and measure them against your annual or cumulative grant-to-date target outcome. I will then explore the ways your performance data can inform your program implementation and design.

And lastly, we hope to provide you with some ideas on how you can use your data to benefit your organization and impact your program design, your outreach and recruitment strategies for participant enrollment and partner engagement, and how performance can be a great tool to engage your program partners and community.

So with all that said, let's talk about the value of reporting your quarterly performance outcomes. At this point in your grant, you probably realize how valuable your performance data is. Hopefully by the end of this webinar, we'll be able to show you that collecting and reporting all this performance data isn't just a chore that must be completed to comply with the regulations of your grant agreement. All the data you're collecting is incredibly valuable to your program. And these are just a few of the ways you can use the data that you already have. You can use it to illustrate your success. Your quarterly reports allow us to share your success with national and local stakeholders.

This includes Congress, DOL leadership, the office of management and budget, the government accountability office, as well as the media and others in Washington D.C., and other local stakeholders across the country. But it also allows you to illustrate your success to your own stakeholders, which we'll discuss in a moment. Knowing your performance data on a quarterly basis allows you to develop continuous improvement processes to ensure that you're meeting the needs of program participants and business partners. Your quarterly performance data is your quarterly checkpoint tool to let you know that you're on the right track of meeting your outcomes.

There's a huge opportunity for you to analyze your program based on what the data is telling you. You can use your performance data to promote your programs, to engage participants, employers, and other partners. Next, tracking performance outcomes helps ensure sustainability of your grant program and to evaluate the effectiveness for future grants.

Having mechanisms in place to track and report your performance outcomes should be an integral point to your sustainability plan. If you can show through your performance data that this program is effective for the H-1B America's Promise grant, you have the opportunity to replicate this program in other industries or new target populations for future projects.

As you know, being able to show a history of successful past performance is always an added plus for future grant solicitation. And lastly, performance data helps us identify areas of opportunity. Discretionary grant programs allow flexibility for grantees to propose and implement innovative strategies for training and employment. Therefore, reporting successful outcomes will help all of us to identify effective strategies that could be replicated and these various needs in other parts of the country.

Performance reporting ensures program activities are not just effective, but have the greatest impact and improve the lives of people across the country – those who are youth and young adults, individuals with barriers to employment such as those with prior records, people with disabilities and limited English proficiencies, and those who are unemployed, underemployed, or incumbent workers that need to advance their skills from middle- to high-skilled jobs.

That's a lot of thinking about performance from the national perspective, but let's get a little more specific. Performance data will inform the way you manage your grant. Your performance data can be used as a map to assess your H-1B program.

Evaluating the effectiveness of your program by reviewing your performance data is one message you can use to make important decisions that will achieve your program goal. Depending on what makes sense for your organization, this could be done before or after the last reporting quarter, at your quarterly stakeholder meetings, or during monthly or weekly team meetings. It should also involve all the members of your team, not just the executive level, authorized representatives and program directors, but other staff and representatives from your grant partners, including case managers, job developers, business developers, and data analysts.

Your performance data is the tool to analyze the success of your training programs. Grantees should closely examine your performance data to analyze the effectiveness of your program and draw various conclusions about your program's training design and delivery.

We ask grantees to provide annual target outcomes for several performance measures, such as total participants served, began training, completed training, and entered employment. As you measure your quarterly performance against your annual targets, you may want to ask yourself, are you where you thought you should be in accordance with your work plan?

Lastly, reviewing your performance data on a quarterly basis is the key to achieving your performance goals. There's always a sign of relief when your performance data shows that you're on track to meeting your performance goals. But what happens when there are gaps in your performance from the last quarter's data? Are your performance goals attainable?

Based on what you learn, you can take the opportunity to improve various aspects of your program before the end of the grant lifecycle. A few things to remember is that data-driven decision making is a team effort. It's an effective method for managing your grant program and the goals that you set in your statement of work.

They're attainable if you incorporate data analysis and data-driven decision making as part of your grant's management. So let's go over some strategies that you can use while you review your performance data with your team. It's important to stop and ask these important questions. And remember that you have coaches available to answer some of these questions, as well as the performance team here at the national office. What should you already know? Through your grant statement of work, you and your team should already know who are you serving? What is your training design? What do you expect to achieve? And what are your end goals performance wise?

This leads us to the next question which focuses more on data, what are your target outcomes? These are the outcomes indicated on your grant proposal's statement of work. Do you have other goals not reported to the Department of Labor? You could have internal goals that can measured using your performance data that you can also use to illustrate the success of your program.

And what else do you need to know? Your understanding of the H-1B performance reporting definitions is important to the data analysis and the evaluation process. What are the reporting definitions that could inform your analysis? Also, keep in mind that the QPR aggregation rules are informed by specific data elements and code values entered for each data element.

Try to think like WIPS thinks. Is this impossible? Maybe. But trying might still help. You may need to go back to your data file and see what is being reporting in WIPS. That was a lot of talking from me. So why don't we take a break and ask you a polling question. How often do you review your performance data? You can select whatever answer is the most applicable. Do you do it every day, every other week – so might call that bimonthly – every month, every quarter, or never? And I will be looking to see if anyone checks never.

It looks like most of you are doing it every month. A few more answers coming in. And it looks like the more majority of you are doing it every other week to every month. And that's fantastic. The important thing is to stay on top of your data so that you know where you are at. Let me give you one more poll.

Do you use any tools to review and analyze your data? We'll be giving you a data analysis tool a little bit later in this presentation, but we wanted to ask you if you are already using some kind of data analysis tool. Do you use a proprietary tool that's customized to meet your own needs? Do you use something simple like an Excel spreadsheet? Or would you like some help in tailoring something to meet your data analysis needs?

And I see at least one of you has checked the "would like some help" box. So please reach out to one of us directly either in the chat box or at the mailbox and we can definitely help you with that. Ah, yes. I see Ilene has written in the chat. Okay. So let's talk quickly about where the America's Promise grants are as a whole. You're at the halfway point of your original period of performance.

And this is an excellent time to look at your data, as individuals too. But today on the big screen, we're going to look and focus on your aggregate results, how you all did working together. This first slide has the basic performance outcomes for the America's Promise grants as of the quarter ending December 31, 2018.

The blue bars represent your actual aggregate results. The orange bars represent your cumulative benchmarks set for the December quarter. And the red bars represent your cumulative targets for the entire life of the grant. You can see that in terms of the participants served and participants beginning training, as a group, you've all exceeded your Year 2 benchmarks.

And participants served, you all have served over 12,500 participants, which is 2,500 more than your Year 2 benchmark. And you can also see that you're past the halfway point of your full target of 21,000-plus as well. You've exceeded your began Training Year 2 benchmarks by over 1,000. And you're right about halfway point of the total targets for this measure as well.

When it comes to participants entering employment, you can see the blue line is just a little shy of the orange line in this case. Employment does tend to come later in the grant lifecycle, but it is worth keeping an eye on, especially in light of the Year 2 benchmarks as well. This chart is looking at your participants served in a more longitudinal way.

You can see you passed the Year 2 benchmarks as a group in the quarter ending in September of last year. And the December numbers are well above that line. It's also helpful to show you this metric as your grants close in on your overall targets represented by the red line at the top. A similar look here as well in terms of the participants who began training in your program.

Your grants just exceeded those Year 2 targets in September as well and, of course, has made good progress in the quarter since. Looking at this chart compared to the last chart, you can see that these totals are slightly behind the previous targets, which is to be expected since it takes a little bit longer to get participants into training programs after they've been brought into your program. The America's Promise grants are also tracking special populations within your grant, specifically unemployed and underemployed participants, as well as incumbent workers. This chart put those two populations together against their target.

The light blue represents the unemployed and underemployed participants, and their cumulative targets are the green line at the top. The dark blue bars represent the incumbent workers, and their targets are represented by the gold line in the middle. Again, there are no benchmarks for serving these populations, so the targets are for the entire period of performance of your grant. What you can see is that the 2/3 of your unemployed and underemployed population targets have been served already. However, only about 1/5 of the incumbent workers targets have been served as of December.

Now, this chart shows you how you did against your own targets for serving participants by the end of the second year. As you can see, the majority of you have done quite well, even surpassed 100 percent of your Year 2 targets. Of course, this chart does not show your total targets at all, but given where we are in the grant life cycle and since we're looking at your data from the quarter ending December 31, 2018, these targets match up nicely. So what we've shown you so far is the big picture, a lot of aggregate data about how you're doing as a whole grant. But one of the things that we want you to take away from the webinar today is that you can use your own data in a more nuanced way than just the big outcomes that are on your QPRs.

You can use your data to raise questions to help you determine if you need to make adjustments to your program or perhaps outreach to see if there are groups of participants who are exceeding your expectations, and then find out if there's something in the program that can be expanded to other areas. Or maybe you can use the data to verify that your program is serving participants in an unbiased way. Knowing that and having data to demonstrate it has value too. At this point, I've talked a lot. And I'd like to pass things over to my colleague, Timmy, who will go over some even more depth data.

TIMMY DUDLEY: Thank you, Kevin.

MR. MAURO: And we'll give you a polling question first.

MR. DUDLEY: Yes. After reviewing your performance data, I am not surprised. I know exactly where we were going to meet our target outcomes. Surprised I didn't know where we stood on these outcome measures or not sure I'd need more information.

MR. SCHEIB: That's the answer we wanted to hear. (Laughter.)

MR. DUDLEY: We won't want to surprise you. So good.

MR. MAURO: And after this poll, we can take maybe a short break just to ask if there's any questions in general at all. And you can enter that into the sidebar, into the chat box if you have it. Are there any sort of questions about the data that we've gone over or anything else in general?

MR. DUDLEY: And again, all this data is based on the information that you all have been providing every quarter through the WIPS system. So it's all data that's available to you. And you can be looking at your grant level around it.

Thank you, Kevin. Here I'm going to present some charts that compare different America's Promise populations against each other based on their completion outcomes, which is completed education or job training. That's based off PIRL 1813. As you know, we send out a lot of information to you guys to make sure that you've been including that in your quarterly submissions.

Comparing specific data outcomes can be used to improve your program by better understanding what particular populations you are targeting and how they are performing. So when you get those outcomes on your QPR, it shows your total of how they're performing. But it doesn't show how these specific populations are doing for outcomes such as completion. So we're going to see some of that today. For all the charts that I'm going to show, they're going to be compared against 34 percent average participant completion rate. So these different populations are going to have their completion rate, and they're going to compare it against the orange line that you see on the chart, which is 34 percent.

That's the average completion rate for participants in America's Promise. You'll also get a chance to see the total counts for these different populations on the charts, as well, and compare them across the AP as a total. The chart you're looking at now is based on the ranks of the participants in America's Promise. That's PIRL 210-215.

As you can see, the majority of these populations are below the average 34 percent completion rate. Only the white population's above at 41 percent. Also, as you can see, there's 3,312 black participants in America's Promise and 5,500 in whites. Those are the two largest populations, although the populations are below 1,000, except Hispanic, which is at 1,869 as well.

I'll give you a second to look at that. And as I said again, these are based off PIRL 210-215, which are the race outcomes that you select for your participants. All right. Now I'm going to take a look at a similar chart that is based on veterans completion outcomes. That's PIRL 301, which is eligible veteran status. As you can tell, most participants aren't veterans. So you have over 10,679 which aren't veterans. And the next highest is eligible veterans, we have 476.

Eligible veterans and then other eligible veterans, which would include spouses of veterans, are actually doing quite well in comparison to the average participant, which they're at 40 percent and 48 percent compared to 34 percent of the average participant. So if you're looking to target veterans, you can try to figure out why they are outpacing the average participant in your population. And maybe you'll want to target more of those. Or listen to them and figure out what you can use for other participants that is helping them complete such a high percentage.

Now we're going to compare education levels for completion outcomes. This is based on PIRL 408, highest education level completed in program entry. You can tell there's a lot of options that you can select for PIRL (108 ?). The highest count of participants that we have in America's Promise is attains a secondary diploma, which would be high school diploma, which we have 4,988.

And then the highest attained postsecondary, the highest attained percentage is attained a postsecondary technical or vocational certificate, which we have at 42 percent. Other populations are hovering around the 34 percent average participant per population except for no education level completed, which is at 23 percent.

And then also at the other end of the spectrum, attained a degree beyond the bachelor's degree is at 24 percent. So as you can see, those two populations are very different – those who have no education completed, those who have passed a bachelor's degree. So if you're looking at your population of your participants, maybe you can target them in better ways to make sure they're complete. Maybe the people who are having advanced degree aren't completing because they're receiving employment while they're in the program.

Maybe the people who have no education level complete don't have the necessary background to be able to be a part of the America's Promise program, so they're not being able to complete the program at the same level as the other participants. I'll give you a second to look at those outcomes. Employment type – now this is based off of PIRL 400, which is employment status at program entry; PIRL 907, which is recipient of incumbent worker training; and PIRL 2101, underemployed workers. We chose these three populations because participants have to fall into one of these three employment statuses to be eligible for this America's Promise Program.

As you can see, unemployed and underemployed are hovering at 37 percent, which is above the average 34 percent completion rate for participants. Incumbent workers are at 19 percent. Now that can depend on how the incumbent worker forms are set up. They could be longer than the underemployed and unemployed participants program.

So it could just be that they're still in their program and they haven't completed at this time. But they're right now sitting at 19 percent, which is a good bit lower than the average 34 percent population. So maybe, grantees, you guys understand that this program – (inaudible) – any longer. And that's why currently they're sitting at 19 percent.

And also, just in case you want to see how many people are unemployed at the highest population is 6,749. And then we have underemployed at 4,069. I'll give you a second to look at this. And last but not least, this chart is actually a little different than the previous one. It's based off training service one for all your participants. And we compared it by the sex of your participants whether they were male or female. Now as you can see, the blue is for male and the orange is for female, and then also the yellow line across them is based on all participants.

What we found interesting about these numbers is that essentially, males and females are going into the same training services at a near equal rate, which is great to see. They're not being pushed into certain areas just based off their sex. And they're going into different ones at a nearly even rate. Occupational skills training, we have over 5,594 participants in occupational skills training. The next highest we have is skills upgrading, which is 2,755. The no training service, on-the-job training, and registered apprenticeship all fall under 1,000.

MR. SCHEIB: It looks like we've got a few questions that have come in while Timmy was going through that data. So we want to kind of move through some of them, see if we can't answer them. One of them was that Jennie from down in Virginia was asking about the cap on incumbent workers.

And yes, you can only serve up to 25 percent of your total population can be incumbent workers. It's certainly okay if you are not serving that amount. But you still have to meet all your performance targets, numbers served and everything. If you said you were going to serve 100 incumbent workers and you're only serving 75, you're going to have to make that 25 up with your other populations that you're serving.

Let's see. Ted was asking, does the outcomes include all performance benchmarks? And I need some clarification from you on that one, Ted. The one that we gave that rolled up the percentages against the total – well, let me go back to it. That's the easiest way to do it. That's what you get for hitting the button too many times. I think you might be referring to that. This was strictly participants served. So it was just looking at that one metric of the number. It doesn't say anything about how many completed, how many entered training, anything like that. But I see you're typing. So if I can offer some additional clarification, I'll do that. John is asking, what does yes mean in the veteran's chart?

MR. DUDLEY: Sure. So as I said, it's based off PIRL 301, which is the eligible veteran status. So you're able to choose one of four options, which is no veteran status. Yes. That's less than 180 days of active duty, so that would be for reserves would fall under that allow the ties. Then you can also select eligible veterans who have served more than 180 days active duty. And then other eligible veterans would be things such as spouses of those veterans. So that's kind of just how DOL breaks down that veteran status.

No training service – so for some participants, they may not have made it to the training service portion of the outcome. So that would be somebody who's a participant, but they didn't actually enter training, so they had no training service. So they selected no training service for those participants.

MR. SCHEIB: It may just be that they – and I'm just probably reiterating what Timmy said – but it just means they may have been enrolled, gotten some service but not actually started the training program yet. That's likely what that is. But yes. We would expect that everybody that goes through the America's Promise is getting some form of training at some point.

MR. DUDLEY: Yeah. So for most participants, you would have to select some training service to be able to select all the other outcomes there linked with that. So you're correct that they would have to select a training service. If you select no, then you can't really move forward with a lot of the other outcomes.

MR. SCHEIB: And it looks like there's a question about incumbent workers.

MR. MAURO: Yeah. I'll take that one. And Timmy, I'm sure you can help me out. So Carissa (ph), are you asking what is the definition of an incumbent worker? I think that may be what you're asking. Yes.

So right. Incumbent worker – so there is a definition. It's in our FAQ. It's in the FOA. But the short answer is – and Timmy's going to help me out if I say something wrong here – is basically, an incumbent worker is someone who is working – well, let me try this another way. It's someone who is working, but the training that you are providing them is being designed with the employer that they work for.

Incumbent worker training really starts with your relationship with an employer, developing a training, or training their staff so that they can stay when advance within the company. Yeah, right.

MR. DUDLEY: So Greg's going to explain a little bit about – because there's usually sometimes confusion about underemployed workers and incumbent workers. So we have just a little bit of information to help explain that a little bit.

MR. SCHEIB: For example, an underemployed worker is they may be working but you wouldn't record them as an incumbent worker unless the training that you're offering them is being done in conjunction with their employer. I think I'm going to move back over towards – we're moving back between different responses. And you are saying, right. I'm on the right track then.

Right. Hopefully, I've answered your question about incumbent workers. But we can certainly take it more offline. But yes. To answer your question, just because someone is working at Denny's, let's say, doesn't make them an incumbent worker. That would just make them an employed person, which by itself is not enough to make you eligible for the America's Promise grant.

MR. DUDLEY: Exactly. You have to make sure that they're an underemployed worker, which means their skills would basically, should land them in a job that's higher than working at Denny's.

MR. SCHEIB: Jennie is helping us out over in the chat box. Thanks, Jennie. Okay. But again, if you ever have any questions about incumbent workers does come up a lot because there are many definitions of incumbent worker. We have one particular take on it. Other programs have different particular takes.

So if you still have questions after the call, certainly reach out to us at the America's Promise mailbox and we can delve into it in more detail. Wouldn't an example be someone that has a BA? I'm looking at Gary's question. Wouldn't an example be someone that has a BA or AA and not working in their field of choice?

That would generally be an underemployed person. And so unless you had – let's say that person had a BA or an AA in aviation mechanics and you were doing incumbent worker training with Boeing and you put them in that training, or they were working for Boeing and they were trying to move up within Boeing, then they would be an incumbent worker. But otherwise, you'd probably consider them an underemployed person. But again, there are certainly nuances. And rather than trying to come up with hypotheticals for you, if you have a particular case that you've got questions or concerns about, just reach out to us and we can help you sort that out.

MR. DUDLEY: And I think you should definitely check out the AP frequently asked questions. I believe what Jennie posted in the chat is directly from there. It breaks out unemployed, underemployed, and incumbent workers. But if you have specific examples that actually are real, you can definitely send those to the AP mailbox.

MR. SCHEIB: Right. Thank you, Timmy. And I'm coming back around to Ted's question. And I think, unless there's others, we'll kind of keep moving along because we do have a lot to cover. But Ted, you're asking, does the outcomes include all performance benchmark? No. I think I'm unclear on your question because, yes. We capture all these various things. The data that we put up to the screen was strictly the number of participants you have served to date.

We could take a look at each of those and have a similar breakdown. But we were just looking at sort of to give a general sense of how you're doing in terms of numbers obviously – how many you get in a training, how many you complete, how many credentials. It can certainly be looked at as well. We were just trying to give you a snapshot of how the grants were as a whole. So hopefully, that helps. But certainly, if there's something more, we could take it offline and deal with it through the America's Promise inbox. All right. Let's go ahead and move on. I think it's back to Kevin. So take it away, sir.

MR. MAURO: Thank you. I am going to quickly go through a data progress tool that was created here in DSI. This tool is available in the file share section of the webinar screen. And it will be available on the COP once this webinar is posted as well. The idea I want to give you is that these types of tools can be very simple. They can be made with software you already have. But even having something like this can help you to think about your data in a different way. You think it is complicated as you like, but again, having a simple tool and using it can go a long way in helping you understand what your data is telling you and maybe even help you figure out which questions you should be asking.

So this is an example of a simple data tool you can use. It's created in Microsoft Excel. The data used in this example is fictional, as is the grantee. But it's simple enough to fill in your own targets and results from either your internal tracking or from your QPR. The green cells are for your targets. The yellow cells are for your results. And these can come from your QPR or they can come from your internal MIS or tracking system if you want to see how your grants are doing in a real time in between creating QPR. And the orangey-peachy cells are for data that you would only have in your internal performance data.

Again, this form is super simple. It's asking for things like total participants served, number of participants who entered employment. These are the things you probably know already or at least are tracking already. And of course, if you create your own tool, you can tailor it in whatever direction is most useful to you.

This is probably also the best time to remind you that all the data that comes out of this tool is only as good as the data that you put into it. So if you're seeing some wild variations or something completely unexpected, it may help you to spot some internal reporting issues before the performance reporting deadline comes around.

And here is what all that input will output for you using this specific data tool. From the data progress tool we've provided for download, this tab will be "auto-magically" generated based on what you filled in on the tab shown on the previous slide. So once those data values are filled in, the rest is done for you. Quickly looking over this, you can see it shows you how many participants this grantee needs to serve and the various metrics to meet its target. You can also see at a glance in the upper right all that green in the bar graph means that this grantee is missing its targets for advancing incumbent workers by quite a bit.

Seeing this should lead the grantee to question, why is this metric so low? Is it because of bad coding on our part? Or is it something systematic in our training program? Other things this tool shows you are things like the ratio of participants who start training to those who complete training. This grantee has a yellow marker by that ratio because it's a little low. And maybe it's something the grantee should work on or at least question why the ratio isn't where it should be. There are other ratios and pie charts. And you can look through the rest of the tool at your leisure. There's even a couple of tabs that explain how everything is calculated.

But what is important to notice is that this display can be whatever you consider valuable to your grant. It's infinitely customizable, so you can use these metrics if they're helpful. And by all means, you could and should add some of your own. Are you targeting veterans or people over 55? The whole purpose of using a tool like this is to make things easier for you. I can answer any questions you may have in just a moment. But I want to first hand things back to Timmy, who wants to address some of your frequently asked questions over the last quarter.

MR. DUDLEY: Thanks, Kevin. So here we have a few questions that we received in the mailbox and also in previous office hours that we just want to address again to make sure that these are clear with the grantees.

For participants served versus participants who began training, as we kind of went over a little bit earlier, participants served are those who are eligible for the program and received services, but do not necessarily go on to begin training. So you have to be a participant served to be a participant who began training, but you won't necessarily begin training if you're just a participant served. So there's two different outcomes to be recorded for those. They're not the same outcome, so just to clarify that. I think most grantees do get that.

But we have had questions in the past about that. Recording grant-funded services – now, there's quite a few grant-funded services that we do want you to record in your PIRL data elements. But two that have definitely come up a lot are supportive services and also specialized services. And I think grantees just have a little bit of confusion on where do things fall under those. Now a lot of discretion of these can be found in your funding opportunity announcement. So if you go back and look at that, it has a lot of detail. So we won't go that deep into it, but for supportive services, transportation and housing, child care and dependent care, and also needs-related payments that are necessary to enable the individual to participate in the education or training activity.

For specialized services, their divide is a group based on one-on-one services that address specific barriers to employment facing those target populations. That could be appropriate assistive technologies and personal assistant services including attendance, interpreters for individual disabilities, benefits planning, counseling including information that will help participants to transition from public assistance to self-sufficiency, and then also, financial assistance consultation and behavioral health counseling and mentoring. So those are some examples given to grantees in the past.

So if you do have questions, as I said, you can write the mailbox. But also the funding opportunity announcement for those grant-funded services are definitely helpful as well. Reporting participants who have exited the H-1B program – once a participant has been marked – a date has been entered for them for them to have exited the program, that should be entered when they've been out of the program for 90 days. So once they're not receiving any grant-funded services for 90 days, you should put that date down for them.

If you already know that this is the last time that they're going be and they're going to be out of the program after this, you can go ahead and put the date down as them having exited the program. But they won't count in your QPR total until 90 days. So usually, whatever date they have left, you won't see that for one quarter after that date. So just keep that in mind so if you're exiting total looking lower than what you would expect, that's the reason why.

So for reporting credentials and measurable skills gains, I think there's some confusion between the two in how they affect each other. We have recently sent out our TEGL 1418 aligning performance accountability reporting definitions and policy across workforce employment and training programs. In that TEGL, there's a link to another TEGL, which is TEGL 1016, which goes into detail about measurable skill gains. I'll give you guys a little bit of that here. And I'll also post a link in the main chat, as well so that you guys can have that.

But essentially, measurable skills gains occur during the program year for participant in education or training program that leads to a recognized postsecondary credential or employment and who are achieving documented academic, technical, occupational, or other forms of progress towards such a credential or employment. So essentially, what you want to keep in mind about measurable skills gains, which are recorded in PIRL data elements 1810 and 1811, are that they are reported throughout the year as these participants are leading towards reaching those three credentials. It can be recorded to them for the training services they're involved in.

As I said, I'll post the links to the TEGL that goes into detail. And in those links, it'll go into detail about five different ways that skills gains that can be recorded, the examples. And then also, there's eight different ways their credentials can be recorded. So there is a difference between those. I know grantees have had kind of trouble understanding that. So these TEGLs definitely help. We sent them out to you guys already. But I think that just having to get an understanding of that content is in there will help you guys.

MR. SCHEIB: All right. Thanks, Timmy. I know while you were talking, a question came in. I'm going to try to take a stab at some of these. And if it gets a little too complicated or dense, I'll take it offline with you, Jennie. But I think you have two questions here, which is can we provide a potential participant with a workshop service but not spend money on them and still count them? Well, the answer is if that workshop is paid for with grant funds and you determine that person eligible, they are a participant and you will be counting them.

If your question is would you just give somebody a workshop and not any further services, it would probably go towards – I mean, you still have credential outcomes and employment outcomes and things like that. They'll still be counted towards your performance, so if you're not giving them training or helping them get an industry-recognized credential, you're probably negatively affecting your performance outcomes.

To your second question, or serve students that have 100 percent leverage funding? No. You can't count someone who is 100 leveraged funding. You can certainly count someone – basically, you are only a participant if you've received some sort of grant-funded service, America's Promise grant-funded service, which might be case management if you're paying for one of the case managers out of America's Promise, something like that. But no, you can't count someone who is not touched by the funds in any way. And is that the second part of Jennie's, what if someone is placed in OJT?

What if someone is placed into OJT that doesn't involve credential but there are skills gains? Well, you'll get the skills gains, but you won't get a credential out of it. I think that's the short answer to that question. And can OJT still be considered a positive outcome?

Well, any time someone gets a job if they get no OJT and they successfully complete and the employer keeps them, that's certainly a positive outcome. You can report the placement. You won't get any credit for a credential necessarily, because OJTs don't generally result in a recognized credential. But let us know if that answers your question. And then we'll go ahead and move on.

So here's the other thing. At the risk of sidelining us with a lot of performance questions, we have three upcoming office hours that we can dig into all of these more in depth. So what I think I'm going to do is I'm going to hold off on trying to deal with this last question. And we can certainly bring those up. Timmy's already making notes. We'll take a look at the chat after the end of this and make sure we address some of these questions during the office hours that we aren't doing here today.

MR. DUDLEY: In the TEGL, it talks about eight different ways that something can be a credential. But essentially, it needs to be defined as a credential consisting of industry-recognized certificate or certification, a certificate of completion of an apprenticeship, or a licensed recognized by a state involved or Federal Government or an associate's or bachelor's degree. So it needs to be a recognized, that's a key factor. We can get to that more tomorrow. But there's eight different outcomes that are recognized in that TEGL for what credentials can be.

MR. SCHEIB: I appreciate your patience. I know you guys love your performance, so we'll get into it this week and next. With that, where are we at here?

MR. DUDLEY: Now I'm going to go over PIRL 1813 a little bit. In the recent guidance that we sent to you guys for this quarterly reporting, we kind of highlight PIRL 1813 in a blog that we just recently posted that goes into details about this. PIRL 1813 is date completed during program participation and education or training program leading to a recognized postsecondary credential or employment. This data element essentially to report when a participant has completed training within the program. They don't necessarily have to have exited the program. They need to have completed training within that program.

We do recognize that the PIRL data element says leading to a recognized postsecondary credential or employment, but all H-1B programs are going to be leading towards those outcomes. They don't necessarily have to have received a credential or employment to count them in PIRL 1813. It's simply to report. It's our PIRL data element that gives us notification that these participants have completed their training within the program. And it directly goes into two outcomes, which is completed training within the program, then also completed training and obtained a credential.

So that's why it's so important, because these two outcomes you guys also do have target goals for. So we just want to make sure that you guys are recording that properly and that PIRL 1813 is recognized as very important. And it's just to recognize that they have completed training within your program.

MR. SCHEIB: Great. Thanks, Timmy. I appreciate all that. And we'll look forward to talking to everybody more about really detailed performance stuff at the office hours. At this point, I would like to introduce our guest, Deb Waymire, the chief operating officer for the Region 4 Workforce Board in Lafayette, Indiana. They are with the area partnership America's Promise grant. And Deborah's going to share how they're using their data to evaluate their America's Promise grant. So Deb, please take it away.

Deborah Waymire: Okay. Thanks, Greg. First, I just want to give you a little background on us. Our project has focused on the advanced manufacturing sector, which happens to be the wealth-driving industry in our region. And probably like most of you, our greatest hurdle in our region was to overcome the lack of resources that we had to transform a large number of job applicants into those qualified candidates that employers were seeking with the skills that they needed.

So to do this under the America's Promise grant, we developed our project under short-term training, with certifications earned from Purdue University and our community college system, long-term training leading to some of the aviation maintenance technician certifications, incumbent worker training, and (OLF ?), and industrial maintenance, as well as apprenticeships, and on-the-job training.

So to keep abreast of our progress, we set up some simple Excel sheets to capture data from each of those types of trainings. We review that information at least on a monthly basis and make adjustments as needed to see if our participants are progressing well in a particular training session as certifications are being earned, and if employment offers are occurring. And we review that data not only to guide our planning going forward, but really to assess what's the effectiveness of what we've been doing. On a quarterly basis, we also meet with our employer advisory team advising them. We're using some of this real-time data on our grant progress and processes to ensure that we're meeting the skills they need in advanced manufacturing.

And then we look to modify our training curriculum in any of the processes that we have looking at the data that we captured, getting that input from our employers, from our participants, and of course, from our grant staff. Now, as a regional workforce board, we do utilize a statewide case management system for data collection and data extract to upload into the WIPS system as we attempt to co-enroll as many individuals as eligible in the WIOA program. But having our own local data allows us to see some of the that real-time activity and to ensure what we're seeing in those data extracts from that statewide system is aligning with what we're looking at locally.

As it's turned out a few times, they didn't always align. And we had to request some corrections to actually the extract queries. Some of the problems that we saw were when the certifications and training completions didn't align with our data.

And then that statewide system doesn't capture all the incumbent worker data, so we needed to keep track of that locally. I'm going to show you just a couple of slides that we use. And on the first slide, we just look at each training cohort. And on this one, you see it's just a very simple Excel spreadsheet. We capture the trainee's information, activity from each other training session for that real-time tracking.

And we get the training dates, the completion, the certification, whether there's a placement or not, what's the wage, right? And then capture some other information that's pertinent to our statement of work, as you'll see that one column about drug screening. That's something that we put in our projects so we make sure we capture that. And then we can pick up some other information. Like, we see someone was interested in a class but couldn't be available until July.

So we definitely want to follow up with that individual and not lose that participant. So in the next spreadsheet, this is kind of a summary and a recap of all the cohort training activity that we've done grant-to-date. We're listing two of the cohorts. We've had about 26 cohorts, as well as some OJTs and incumbent worker training. But here we can do a good look at how we've been progressing and compare our progress to our outcomes and goals. So for example, in our statement of work, we said we would serve 1,124 individuals. And as of March 1, we served 1,007. So we're at about 90 percent of our outcome for that element.

And then looking at some of the other goals that I've kind of highlighted in green, our goal is to have 80 percent of all participants enrolled in training to complete training. And we're training at an 83 percent completion rate there. And then for those who completed a training activity, we wanted to have a goal of 87 percent. And right now we're trending at 96 percent. But also wanted to look at how much of the grant time has elapsed. And you can see down in blue, 54 percent of the grant has elapsed for us. And we're progressing well in some of those areas – participants served, people entering training.

But as you look to the right kind of in that peach color, you'll see that we're not trending quite as well with our OJTs and our incumbent worker training activity. So we then kind of looked at the next chart that I'm going to show you, which is just a simple bar chart. And again, it just gives us a quick, quick look. And it's easy to present this to our board and our advisory teams to say, looks like we're doing well in some areas, but not trending well in that OJT and incumbent worker training. So just looking at that by itself, we might think we really need to refocus our efforts away from that short-term training and really focus on OJTs and incumbent worker training.

But we know that just looking at these numbers by themselves is not giving us a full picture. So if we look at the next slide, you're going to see that what I've added towards the bottom is how are we doing expending our funds? So adding that budget information, we still see that we want to move some of our time and attention on OJTs and incumbent workers. But we don't really want to move away very much from that short-term training because we've only expended about 53 percent of which our training funds even though we're meeting our goals pretty closely. I mean, were there some rationale that we've discovered as to why that's happening and that's been important for us to look at?

But we want to keep all of this information in mind as we make decisions going forward. One of the things that came across for us that this information helped us very much was just like last May, one of our advanced manufacturing employers had to add a new line. So they really needed to increase their training substantially. And they had been, as their hiring needed to increase, they had done a return on investment study showing how valuable this training was to productivity and retention. So they really wanted to see if we could increase the number of classes; and the amount of funding that we had, could we make that available?

And as we looked at how we were trending with our expenditures on incumbent worker training, we could see we could shift some of the funds in our training align budget to help with that short-term training. So again, just having all these parts of information in a quick, easy-to-see spreadsheet helped us to make that decision. Those are some of the ways we use this information along with what we see with the quarterly reports and the QPRs. So I'll be happy to answer any questions if anyone has one.

MR. SCHEIB: And just a reminder to go ahead and if you have any questions for Deb, just put in the chat. And thank you very much. That's really informative and really interesting to see how you're tracking that, your own performance and how you're using it to manage just the day-to-day activities of your grant. At this point, if there are no questions for Deb, we're going to go ahead and we're going to switch gears a little bit, although all related. I'm going to pass it over to Megan Lizik, who is the evaluation team lead on the America's Promise national evaluation. And we're going to talk a little bit about where we are with that. So Megan, can I just pass that over to you?

MEGAN LIZIK: Sure. Thanks, Greg. And hello, everybody. It's great to be here today to talk a little bit more about the evaluation. As Greg said, it's all related. So as many of you know, DOL is conducting an evaluation of the America's Promise Grant Program with the overall objective of identifying practices associated with stronger regional coordination and to estimate the effectiveness of American's Promise services. So in order to do this, DOL's chief evaluation has contracted with Mathematica Policy Research and Social Policy Research Associates in fall 2017 to conduct the five-year study.

The evaluation has two main components that my colleague, Rob, will talk to you more about in a minute. But as you know, one is an implementation study. And the other is an impact evaluation.

So before stealing any of his thunder, I will turn it over to my colleague from Mathematica Policy Research, Rob Santillano, from the America's Promise study team, to refresh us all on the focus of the America's Promise evaluation and what we're trying to learn through the study and the timing for data collection activities so that we're all up to speed on what to expect in the near future. Rob?

ROB SANTILLANO: Thanks, Megan. So this is Rob Santillano again from Mathematica to talk about the America's Promise evaluation and the two related studies. And so what I want to do here is really just go over the research questions related to each study, clarify what we're going for.

And the first question here is directly related to that collaboration that Megan was just talking about that is so integral for America's Promise. We want to have an understanding of how were regional partnerships developed and maintained? So that's the first question we're going to be trying to go after. The second is what are the types of services and combinations of services and approaches that were provided?

You all are trying some different things. And so those are all things that we want to document and see how they were being implemented. Next, we want to really dive into the characteristics of those served.

And so this is going to look very similar to a lot of the previous statistics that we were looking at earlier today where we want to understand those who are served not only in terms of demographic background, but also in terms of recent labor market activity and kind of where they were. So again, kind of drilling into the underemployed incumbent workers and unemployed populations.

The next question that we're going to be looking at is the community context of America's Promise. And so you all are spread out across the country and there are different challenges facing each of you and different synergies that are taking place within each locality. So we will be trying to understand and document those things, as well, including things like "urbanicity" in rural areas.

So that pretty much covers the implementation study. And then for the impact study, this is where we really want to start thinking about the effects or the impacts of the program. And so the primary question we were going to ask is, what effect did America's Promise have on education, training, and skill development, as well as labor market outcomes?

So those are the primary questions. And I do want to point out here that our strategy for doing this is to try to use administrative data where we identify similar individuals who are not America's Promise participants, but who are also engaged within the workforce system. So again, to be very clear, this is not an impact study based on any kind of random assignment. We will not be doing random assignment or anything like that. Rather, we will be attempting to use administrative data only to build up our America's Promise, as well as our comparison group samples.

So then after we look at the overall impact, we then want to tie this in with the implementation study and really look at did the effects vary by participant characteristics or program components? And I want to also add some of the other ways that the context of America's Promise and where it was implemented, did the effects vary by those contexts as well? And so that's really the overall set of questions that we're trying to answer with the two studies.

And so on the next slide, we have a set of data collection activities that you all should expect or you've already been participating in and some timing here. And so the first very left panel gives different time frames and periods where we will be conducting different activities. The second column really focuses on information that we will be either obtaining directly from you or you have already submitted. And the final column is actually unrelated to you all at this moment. But it's really the administrative data that I was talking about earlier for the non-America's Promise participants and stuff that we have to do there.

So just kind of going over these, in the first panel, it's document review. We've already been reviewing all of the applications and the quarterly performance reports and all the other stuff that is a normal part of America's Promise and what you all have been submitting to DOL already. So our team has been combing through those things starting back in 2017. And we will continue doing that through the end of the grant period.

The next panel talks about the grant survey, which you all have just finished. We have completed that. All of you have responded. So at least one person on your team is very familiar with this. Another thing that we're doing currently is we are starting the process of outreaching to states for those administrative records.

And so our team is just launching this part of it. And so if you ever hear from your state agency or they reach out to you related to some data request, this is what that is. And so that should not be surprising to you in the future in you hear about that. The third panel here is talking about the partner network survey.

And so based on the grantee survey responses, we're actually trying to identify 6 grantees to really understand the partners that you all are working with. And so 6 of you will be reached out to within the next few months where we will start this partner network survey, and we will do it twice. And so unlike the grantee survey which was just responded to by grantee staff, this one is really going to focus on not only grantee staff, but the employers and other groups that you work with that are part of your network implementing the America's Promise, so integral partners there.

And the reason why we're going to be doing it twice is to see how these relationships have changed and how that work that you all have been doing together, how that's changed over time.

And so again, we'll be rolling that out and identifying the grantees over the next couple months. And we'll be doing it again in spring 2020. Just in case you were going to ask this, the 6 grantees have not yet been finalized right now. But we do have an idea of which of you we're going to be asking. And then finally, in the last panel, we have our – related to the implementation study – we have both site visits and phone interviews that we'll be conducting late 2019 and early 2020.

And so here, there are 12 grantees that we'll be giving site visits from our team. And this includes all of the 6 grantees that have been participating in the partner network survey will also get site visits. And then for the remaining 11, we will be doing phone interviews, which captures a lot of the similar information as some site visit, but is clearly going to be less detailed given we won't be able to spend time with you all in person.

And so that really kind of summarizes the data collection activities that you should all be expecting in the near future. And so with that, I'm going to pause and see if you all have any questions. And my colleague, Jill Berk, who is also the co-investigator for this project, will also be available to answer questions.

MR. SCHEIB: Great. Thank you, Rob. Does anybody have any questions for Rob or Jill or Megan at this point? We will be certainly getting back to you as we finalize the 6 of you who we'll be doing some additional follow-up with. Looks like we're good for now, so at this point, I'm going to pass it back to Timmy just to touch base on some of the resources we have available in terms of performance for you.

MR. DUDLEY: Grantees are invited to attend our upcoming performance reporting office hours for the quarter ending 3/31/19. So that's the office hours now. They are due on the 15th of May. An Outlook invitation was sent out last week. We encourage you to please accept at least one of them or multiple if you can. The three dates are Thursday, April 25; Wednesday, May 1; and Tuesday, May 7. So any of the questions that you didn't get to ask today, you can definitely ask those tomorrow. We'll have more time to kind of break them down more thoroughly.

Our H-1B performance resources site – included here are some of the links that have been recently updated. In the guidance that we sent out last week, you received some of these. And some of these were updated the previous quarter as well. So as always, we include all of our most up-to-date resources on this page. Please use these links, and let us know if you have any questions about these or can't find anything that you're looking for.

MR. SCHEIB: Great. So with that, I think we are done. That was a ton of information to go through. But thank you, Timmy and Kevin. And also thank you to Megan and Rob and Jill and, gosh, anybody else that I've forgiven about – Deb – and Deb, of course. I'm sorry, Deb. Thank you all for the great input today. And thank you all for attending with us. As always, if you have questions or concerns, reach out to the America's Promise Grant mailbox. Your coaches are also available to you and your FPOs as well. I'm sure we'll be talking to you all soon. So have a wonderful afternoon.

MS. MCCALL: All right. Excellent. And I want to also thank all the participants and presenters to today's webinar.

(END)