**WorkforceGPS**

**Transcript of Webinar**

**Maximizing WIOA and Non-WIOA Performance Data Cohort**

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GRACE MCCALL: And welcome to "Maximizing WIOA and Non-WIOA Performance Data Cohort" webinar.

So without further ado, I'd like to turn things over to our moderator today, Shelia Lewis, workforce analyst, U.S. Department of Labor Employment and Training Administration. Shelia?

SHELIA LEWIS: Thank you, Grace, and welcome, everyone. Thank you for joining us today; for some of us, good morning, for others, good afternoon. On behalf of the Employment of Training Administration, the Office of Career Technical and Adult Education and the Rehabilitation Services Administration, thank you for taking the time to participate in this webinar and to learn about some of the work that was done during our most recent performance cohort.

Today you will get a chance to hear from both the facilitators of the cohort as well as some of the participants. Before we continue, I'd like to take this opportunity to thank all of our cohort participants for their participation, time, ideas, creativity and dedication to this project. I'd also like to thank all of the Department of Labor and Department of Education staff and our contracts staff for their behind the scenes work on this project.

Our presenters will share some of the most promising practices that they discovered around maximizing performance data along with some different activities and resources that were available that they were able to produce around this topic.

To provide you with some background, this cohort was a product of a suggestion from our 2018 regional session training where they suggested that we develop a cohort focused on the ways in which states use performance data to manage their programs. As you may know, this is the third joint ETA, OCTAE and RSA performance cohort. Our two previous cohorts were focused on the effectiveness in observing an employer, indicating their performance and of co-enrollment.

In addition to discussing the cohort itself, we are really excited to share with you our cohort capstone product, which is a resource developed by the cohort participants for the purpose of helping other states address challenges that they may be facing around maximizing their performance data. It is call the maximizing performance data development model and we can't wait for you to learn more about how it works and ways in which it might be useful to your efforts that you're already taking, that are already taking place within your state.

A couple of our cohort members participated in a panel discussion about the cohort and this model during our ETA spring national performance training in Dallas this past May. This session was very well received and we want to make sure that anyone who was not able to attend the training still had an opportunity to hear some of the information that was shared and to learn about the different promising practices we were able to discuss.

Now I'm going to turn over our state's event to our facilitators, Cynthia Forland and Rosalyce Broadous-Brown to begin walking you through maximizing WIOA and non-WIOA performance data cohort and all the great outcomes that it produced. Cynthia, Rosalyce, take it away.

ROSALYCE BROADOUS-BROWN: Hello, everyone. I'm Rosalyce Broadous-Brown, senior analyst with Maher & Maher and one of the facilitators of the maximizing WIOA and non-WIOA performance data cohort along with Ms. Cynthia Forland.

CYNTHIA FORLAND: Hello, everyone. I'll also help to facilitate cohort and senior consultant with Maher & Maher. So thrilled to have you all with us today.

MS. BROADOUS-BROWN: We also have representatives from five of our six state cohort teams participating on this call and they'll be talking to you a little bit later about their experience in the cohort and how it has impacted their states' efforts around maximizing performance data.

As Shelia mentioned, today we'll be sharing with you some of the activities, the strategies and the outcomes of the cohort. We'll give you a little bit of background, talk about some of the cohort highlights and then get into some of the products that were developed by our cohort participants which we believe will be useful to the work that's taking place within your states as well.

And we wanted to start by giving you a quick overview of the cohort itself. Six state teams were chosen from a pool of applicants to participate in the cohort. They were chosen based on a number of factors, including geographic diversity, state plan and organizational structure, timely submission of annual performance reports as well as the quality of their applications.

We knew that some states were doing things like developing dashboards that showcase data across multiple programs. Some states were developing or enhancing their state longitudinal data system. And others were just trying to wrap their heads around meeting all the WIOA performance requirements.

ETA, RSA and OCTAE wanted to make sure that the cohort makeup represented states who fell into each of those categories along with those that fell somewhere in between. So our participating cohort states ultimately included Arkansas, Indiana, Kentucky, Massachusetts, Minnesota and Virginia and their state teams were made up of representatives from each of the WIOA core programs and from additional partner programs such as SNAP TANF, CSET and Health and Human Services.

Every cohort centers around a specific challenge that each of the cohort teams have either been working to address or would like to address within their states. In the case of the maximizing performance data cohort, the challenge was exploring and identifying different ways to take all of the data that states are required to collect and use it to demonstrate programmatic achievement challenges and return on investment.

We wanted the participants to begin with the end in mind so we established a few cohort goals at the outset. We refer to these at the start of each session and ask the participants to keep them in mind throughout the cohort as they exchanged information with their fellow cohort members, completed cohort assignments and as they worked with their teams to begin implementing new strategies and ideas within their states.

In addition to exchanging ideas and promising practices across the state teams, the purpose of this cohort was also to take all of the information that had been shared throughout the cohort and use it to develop a tool or resource that would help other states who were also working to maximize their performance data. You heard Shelia mentioned that earlier. That resource would ultimately become the maximizing performance data development model, which we'll be talking about a little bit later in the webinar.

So a little bit of information about some of our cohort activities and discussions. Our presenters will go into greater detail, but generally speaking, we spent the first session just getting a feel for the common challenges across the teams around maximizing performance data. We spent the next couple of sessions identifying and sharing solutions to some of those challenges. A couple of states even gave presentations on tools that they were finding useful in their efforts to maximize data. Kentucky presented their new local area data batch for it and Virginia showcased their state longitudinal data system.

During our in-person meeting, which is always one of the cohort highlights, the participants had an opportunity to hear from our federal leadership panel that included Karen Saha of ETA, Cheryl Keenan from Adult Education and Chris Pope from Vocational Rehabilitation about the federal guidance and TA that support states efforts to maximize performance data. It was also during the in-person meeting that they began building the maximizing performance data development model.

And the last few weeks of the cohort, the participants spent time working within their individual state teams to develop action plants that incorporated many of the things that they had learned and discussed with other states throughout the cohort. And we'll hear from two presenters later on who will talk a little bit about their action plants for maximizing performance data within their state.

Now that you have a general idea of the cohort and its activities, we're going to give you an opportunity to hear directly from some of our cohort members. They're going to tell you a little bit about their biggest cohort takeaways and the impact that had on their work and their state's efforts around maximizing performance data. So we're going to start with Drew Griffis from Indiana. I'm going to go ahead and turn it over to you if you don't mind.

DREW GRIFFIS: Hi, everyone. This is Drew Griffis, director of performance and business intelligence with the Indiana Department of Workforce Development. I'd just like to start by saying the main thing I got out of being part of this cohort was just the fact that so many of us are in the same boat. You know, we're in the same place. We're starting from nearly, you know, at the beginning nobody has really taken the ball and ran with this, you know, outside of Texas and California and some of our larger states.

What we noticed right away is that we all shared the same challenges, particularly when it comes to limited resources, especially in the areas of stuff where, whether you're doing a tableau-powered DI (sp), whatever data visualization tools you use along with your server management software. Also, the right kind of training and even the money to have the right sort of staff. Also, it's that the, you know, the requisite skills necessary of your current staff. Do you have people who are able to visualize data? Do you have people that are able to effectively query databases?

We've also found that, you know, case management systems and data collection processes were designed to meet federal reporting requirements. Now, this isn't a bad thing whatsoever, but when it comes to looking at data in different ways beyond, you know, 90 day soft exits and the different requirements around the federal results as we're trying to put sort of new KPIs and analytics around it is a challenge for everyone.

I learned that a lot of states are at different points in the process but have also sort of tackled unique pieces of the whole picture. And I'd just add that along with that, there wasn't really a specific starting point, so as much as this is sort of a cycle rather than a start to finish line, you know, so along this cycle folks have homed in on certain points. When we got together, you know, the whole, you know, you could sort of see the whole picture a little better. I know when Indiana started down this route two years ago, it would've been great to have a resource like this put together and sort of the resources made available by this cohort. It would have been invaluable at the time.

Moving on from that, I would just encourage anyone interested in developing KPIs or other non-WIOA performance metrics just to start somewhere. An easy place is to just visualize your federal performance report. We've found in Indiana that it was very helpful to our field staff and to decision makers to be able to show sort of through a tableau visualization the historical, you know, federal reports rather than hand them a big stack of PDFs in the form that they're currently made available.

I would also just encourage everyone to reach out to colleagues for templates. So existing tableau templates, RBI templates that basically have the data structured and you can plug in your data and already have a batch form ready to go. And I would also recommend seeking out commonly used KPIs and their related formulas. Texas is great about sharing theirs.

Just you know, there's enough information out there that the idea of having to start from scratch really isn't necessary. What's out there for you can get you going. And so, I'll just say that, you know, just remember that you're not as far behind as you might believe and, you know, there are resources and colleagues available to help you get started. Thank you.

MS. BROADOUS-BROWN: Thank you very much, Drew. I think that’s true. You are not alone and I think the cohort participants, that was a big thing going for all of them that there were things that they could each learn from each other and that there were challenges that they all shared.

I'm going to turn it over now to Carrie from Minnesota.

CARRIE MARSH: Hey. Thank you and good morning, everyone, or good afternoon. My name is Carrie Marsh. I'm a performance analyst at the Minnesota Department of Employment and Economic Development and I just wanted to share some of the things that we learned from participating in the cohort. We did learn something from every single other state as well as built professional contacts for future questions and collaborations. There's really some fantastic work happening around the country with regard to improving data sharing agreements and access to data as well as the utilization of performance data.

So just a few of the highlights for me included Minnesota's state services for the blind division actually implemented something that they learned from another state at the in-person cohort session. Natasha, who's our interim director of services used the strategy that she learned from another group to present about the importance of performance measures to direct service staff.

They held small group work sessions to understand the relevance of complete and accurate data entry and the related impact to performance and funding at a state level and at a national level. They received really positive feedback about this small group approach and said that it led to better understanding from direct service staff.

A couple other items that I thought would be great to share with the audience was some dashboards and state performance metrics. Indiana's performance metrics dashboard, Drew, so I really like what you guys are doing in Indiana. Your dashboard combines regional and federal performance and I really like the engagement rate, which calculates the percentage of individuals that are meaningfully engaged by the workforce system compared to the total number of unemployed and underemployed.

Another dashboard that I'm a big fan of is Kentucky's local workforce area dashboard and just the wide scope of metrics that they use to raise the local areas and includes unemployment insurance, adult education in addition to apprenticeship and services to employers and many employment measures. So just a few highlights. There's a lot of great work out there.

MS. BROADOUS-BROWN: Thank you very much, Carrie. I agree. There is a lot of great work. And now I'm going to turn it over to Megan Lamb from Arkansas.

MEGAN LAMB: Hi, everyone. This is Megan from Arkansas and I work for the Division of Services for Blind.

So I agree with everything they said, but one of the other things that I really enjoyed about the cohort was that it sort of required our partners to actually get each other in the room and sit down and talk to each other within our state. So because we're really busy and, you know, as I'm sure other states are short staffed and trying to meet all of our requirements and figure out where we are in our own agencies, sometimes we kind of got stuck in that space and didn't take the time to get the data people in a room together to talk about how they collected data.

And so, I really enjoyed that opportunity to sit down with our state and I learned a lot from my partners about the language they use and the challenges they face so that when we're make requests of each other that we can understand and communicated better. And I felt that it's really helped us as partners communicated more effectively.

I understand where they're facing challenges and maybe why they don't understand what I'm asking for or various things from that. It was also really interesting to hear from the federal reporting bodies that we all report to, what they're asking of each partner to give a better understanding of how we can work together.

And then at the end when we all got to sit down and talk about our goals for our state, getting that head start as partners on where we wanted to take the projects in our state really helped us when we came home to get together and start working on our common intake and common referral system. It's still being put together, still being built. But our conversations have moved a lot faster and a lot more smoothly since getting back from the cohort and having that time to communicate and sort of clear some of those understandings up.

MS. BROADOUS-BROWN: That's great, Megan. And thank you to all of our cohort participants who have shared some of their highlights from participating. I believe that Shelia wanted to ask for clarification of one of the questions that we received.

MS. LEWIS: Yes. So I believe the question came from Scott and the question is can you provide contacts in Texas that I can reach out to for examples of their visual. So I would say does anyone joining our call today from Texas, if you would put your information in the chat room or do you have a link that you should share that would help all of us? So we'll move on. I'll turn it back over to Rosalyce. Thank you.

MS. BROADOUS-BROWN: And I will hand it over to Cynthia, who's going to begin talking to you guys a little bit about our maximizing performance data development model.

MS. FORLAND: Great. Thank you so much everybody. I know it's always helpful for you to be able to hear from folks in states about their experience, so that was great to hear from Drew, Carrie and Megan.

So what we're going to talk about next – did I skip too far ahead? I did. It's the outcomes of the cohort. So you heard a little bit about the work that was done, the six states completed over the course of a number of months. So what are the results and ultimately how can it be helpful to you? So that's what we're going to be talking about for the remainder of the webinar.

So you've heard a little bit of talk about this idea of a capstone, a cohort capstone. So what exactly is that? Well, it's the opportunity for participants in a cohort working together as one team, not just in their state teams, to identify and develop a tool or resource to help national, state, local colleagues address and identify a challenge. So it's really the sort of thing that could live on beyond the cohort and those who couldn't be a part of the cohort can have something tangible that they can benefit from, even if they weren't a part of that work.

So in a nutshell, the challenge with this cohort is telling your story, right? So how do you use performance data to talk about your challenges, your successes, return on investment? There are a lot of numbers and a lot of data for people who are not familiar with data or just really, really busy policy makers. You need to find a creative way to tell your story.

It's not easy. It's more important than ever. In terms of the scrutiny on public resources and how they're being used, we need to be able to communicate what we're doing and why it matters. States at all levels can improve and Drew talked specifically to that. No one is as far behind as they think and everyone can always do a little bit better, so there's something in this for everyone.

So the exciting piece is that we have a new resource that can help states diagnose where they are in terms of being able to use performance data to tell their story and how they could improve in telling their story. That's where we're going to dig into a little bit more.

So this is where we have what we call the maximizing performance data development model and it's a resource to help states, number one, diagnose where they are as organizations in using performance data to demonstrate programmatic achievements, challenges and stakeholder return on investment. So that's the self-assessment tool and we're going to go a little bit more into that in just a moment. The second piece is OK, I've figured out where I'm at. Now what do I do? So the next is kind of how you take that to the next level so determining next steps for making progress and using performance data to tell your story.

So I'm going to move into talking a little bit more about the self-assessment tool and I'm going to warn you there's going to be a poll question coming up so make sure you're paying super, super close attention. There are a series of four multiple-choice questions. We wanted to keep this brief, but we're also focusing on the key issues. So those are centered around four main topics, those being leadership and partners, using and integrating data, resource needs and data governance. So for each of the questions related to those topics, there are a series of five answers. You're going to be answering on a scale of one to five with some pretty detailed information in those answers.

And the questions around for leaders and partners is basically do they see the importance of data-informed decision making? Is your state using and integrating data to inform policy and operational decisions? That's the focus of question two. For three, has the state identified and met resource needs to enable effective use of data for decision making? And the last is around data governance. How is your state data governance structure and that's really what's your formal approach to securing, managing and sharing data?

So I'm going to give you an example here on the screen of question number two and this is the one of using and integrating data. To what extent is your state using and integrating data to inform policy and operational decisions? And you can see there are a series of levels here of answers and in order to make it a little bit simpler, there's an initial answer for level one, let's say, so minimally. Primarily, you're focused on meeting individual federal reporting requirements and not able to spend as much time using data to inform policy and operational decisions.

And then after that answer, there's a series of what we call may be characterized by the following so a couple of traits that will help you identify whether or not that's where you're at. And so, that is looking at federal reports containing missing or inconsistent data, you don't have a process for reliably validating service and performance data within individual programs and summary data are not made available to the public.

So for each of these answers as you can see here and for each of the four questions, although we don't have all four up on the screen, you can see that there's a description of here's an answer and here are a number of characteristics that will help you figure out where you are at. And I just want to remind you that even thought we're showing some screenshots that may not be here, in the file share box within the webinar, you have all of these documents available for download, the PowerPoint, the maximizing performance data development model. So you can even be looking along with that now or after the end.

Now, in our next slide we're going to be moving onto a poll question, so here's where the question I've been talking most about, to what extent is your state using and integrating data to inform policy and operational decisions. I want you to take a moment, look at the poll question and these are the five answer options.

Now I know you can't speak for your state as a whole. No one is recording these answers. They're just answer as makes sense to you from your perspective. No one is going to be sending a report card back to anyone else on this. So think about your experience, what you've seen, what you're a part of and where do you think your state lies here? And I'm just going to be quiet for just a moment to let folks go ahead and continue answering. I already see some answers popping up, so that's great.

OK. I see some answers are still coming in but we're seeing a little bit of a trend. Looks like about 30 percent are saying answer one. 30 percent again are saying answer number two. Then we've got about 14, 15 percent at answer number three and then we've got the heftiest percent that are saying you know what? We really are fully integrating data for that decision making and policy and service delivery across the workforce development system so that's awesome. I'll leave it up for just – perfect. OK.

So now that you've all bared your souls in that regard, why don't we talk about what comes next? So as I said, the idea is not just, OK, where are you at, but so what? What does that mean? What do I do? So this is where we get to the resources for taking that to the next level. And this component of the development model is about directing the states on next steps, including relevant resources and tools. It provides the opportunity for states to develop a concrete improvement plan and we're going to talk about that in a little bit more in a minute as well.

But on this next slide you can see some links and these indicate the sorts of things actually that some of you talked about in the chat room. These are not all the sorts of things that are in there, but just gives you some examples including some of the state dashboards. Some have been mentioned already on this call. But various types of resources around key data sources, data quality, data validation and data visualization examples.

But one of the things I want to do because we have a lot of folks who answered at the one or two level is I want to talk a little bit more about specifically what information would be for you at that one or two level. So in question number two, the one you guys just answered, is if you were at the first level and said you know what, I'm not quite at the point at which I'm able to do a whole lot with that data and so I'm really focused on federal reporting requirements. So the taking it to the next level is identified as reaching a point where you're using and integrating data to inform decisions, at least within individual programs, so there's examples too of ways to get there.

If you're struggling with federal report quality and submissions, focus that time and resources toward regularly successfully submitting the report. And then there's a reference to your state and these are the categories of links below that you might want to look at, federal required reports, data quality and data validation.

The other tip here on how to get there, developing data visualizations starting with individual programs and use those data in developing and updating policies and practices. And then it refers you to some links around data visualization applications and tools and data visualization examples.

So the idea behind the resources and tools is to help you identify not just, OK, where do I go from here, but really concretely what some of those next things can be and examples of other pieces. Included in this packet is a template for next steps. And so, you can use this. You don't have to use this, but this is a way to quickly say for the how, how long, who's responsible, how will we know we're successful to be able to get really concrete about next steps.

And some of the things I think that's really important too is this, the resources and tools in this part of the model. Is it, it's not about saying it's a zero-sum game, right? I've either figured it all out or I haven't, but how do I do some small incremental things that could help improve how we as a state are telling our story?

So the last thing I'll mention is this development model includes a facilitation guide. It provides step-by-step guidance for applying the maximizing performance data development model, including convening a state team to complete the self-assessment tool and determining concrete next steps. And here's an example of a little snippet from that. Once again, it's in the development model that you can download in the file share.

The idea is there's no right or wrong way to apply the model, but this document lays out a facilitated approach bringing together a state team at a minimum including all four titles of WIOA, including folks too that not only that are from policy, operations and performance and also including folks with decision-making authority so that there's some heft in the room because it's one thing if a lot of us, you know, smart, capable worker bees come up with some things. But if there's not buy-in from decision makers, it can be pretty difficult to actually put that new action plan into place.

But you want to see in the room people with decision making authority for each of the programs oversee the development and maintenance of policies governing the programs, oversee services provided to employers and job seekers and understanding and really pulling data from key data systems. There's many of you who are on the call who work with data frequently. Sometimes there are unrealistic expectations about what data is available or how it can be pulled. Ideally there would be a half day session in person with that team to walk through the self-assessment and build up those next steps.

So I'm going to give you another poll question and this is just based on what you've heard so far and if you happen to be able to look at the document in full, but the poll has just popped up. Just please respond to the following statement. Would this tool be beneficial in your state's efforts to maximize performance data? So I'm going to once again be quiet for a moment and let you guys respond to that.

OK. Great. So it looks like most people have answered and recognizing that, you know, you don't know all the ins and outs of this yet, but just giving us your gut reaction. It looks like about 14 percent say they strongly agree. 57 percent said agree, so that's kudos to the great work of this cohort. 26 percent say somewhat agree and we've 2 percent saying no, no. I don't know if this is something that's going go help me. And half a percent so far saying no, I strongly disagree. So thank you for sharing that information and one of the key points of this is if it is something that you think would be helpful for you, this is now a resource for you to be able to use within your state.

So now we're going to talk about state action plans. Let me introduce this a little bit. We're fortunate to have two states who are going to talk about their state action plans and they used a template that looks a lot like the one that I just showed you for a template for next steps. The great thing about this cohort is that starting with the actual application process to the cohort, basically states have to do something akin to the self-assessment tool that they ended up developing.

So they had to really reflect on where they're at in terms of using performance data to tell their story, to talk about challenges, to demonstrate successes. And then through the cohort in learning from each other and being able to talk with each other about upticks that they've done, practices other people have used. You heard some folks who talked about the in-person meeting and the kinds of things they learned and have already implemented.

And they were able to come up with state action plans. So this was the sort of thing that was very specific to their state separate from the cohort, which was designed to be applicable and useful for all states across the country. In your file share box, there are the state action plans. That's one document that has all six. Like I said, you're going to hear a little bit more from two states about the work that they did.

And so, what I'm going to do now is we're going to start off with Kentucky and I'm going to turn things over to Natalie Cummins and Rachel Adams to tell you a little bit more about the work that they did.

RACHEL ADAMS: Hi all. This is Rachel Adams. So one of the things that we started looking at in last year, probably the winter of 2018, February of 2018, was performance and a dashboard that would reflect on how to incorporate all of our data between our partners. In the midst of doing that, we also went through reorganization, incorporating OVR and OFB and then in December, we went in and added the addition of (opt ed ?). So we started looking at bringing all of our partners together and collecting data and how we were going to do that.

So we established a common dashboard that was inclusive of OVR matrix, adult education matrix, UI matrix, Wagner-Peyser measures and then WIOA measures. So we started looking at what did we want to measure? What did we want the public to see? What did we want our public stakeholders to see? So that has evolved over time. We are still working on finalizing I guess is the right word to use that dashboard of what we wanted to see. But in doing that, we started working with our partners and building this out. So we have in Kentucky, we have what's called KYSTATS and they are the data warehouse for all of our data.

So in addition to that, in October of 2018, we launched a brand new case management system called Key Sweep. So all this is like the perfect storm of trying to collect data. So as we worked on this cohort group, it became obvious to us, especially in Kentucky on the workforce side, that we were not using our data to drive those decisions.

So with all that being said, as we looked at our dashboard and we rolled it out for the very first time, it allowed our stakeholders to see what data, what our UI rates look like, what our credentials rate looks like, what our employment rate looks like through our partner programs and through our programs in a real time measure. Not the federal performance measures because while we understood that those were a part of a federal requirement, we wanted to look at real time data.

So what we are continuing to do is we will begin in the fall of 2019 working with our partners as a group sitting down with senior leadership and taking those data that we have and starting to use it to make data-driven decisions as we move forward with our partner programs and incorporating all of our data into one key system.

So with that being said, I will turn it over to Natalie who is from Skills U, which is our adult education here in Kentucky and she will fill in the more granular part of our state cohort.

NATALIE CUMMINS: Thank you, Rachel. I think you really covered most of it very, very well and I appreciate that. So yeah, just to tag onto what Rachel was saying, we are really trying to take advantage of the fact that we are part of one greater organization now under the cabinet and that we do have a tremendous opportunity to cooperate and align things so that we can be making decisions that benefit all of the core partners who are all together and try to get more outcomes jointly.

I know that at a, what Rachel was talking about as more granular level, we still have some more discussions to have about getting the substantial amount of Title II data to talk more with the Title I and Title III and Title IV data. But those are discussions that we're beginning to have and that we will now that we've got the ball rolling I think we can continue to have more in-depth in the future. Any questions?

MS. FORLAND: Thank you, Natalie, and thank you, Rachel. Yes. Feel free to put questions in the chat if you have any. We'll have questions at the end but for right now, if you've got questions about specifically what Kentucky has talked about, please type those into the chat. We have a lot of people on the line so we can't do, it would be a little bit hard to traffic all the audio, but please put any questions or comments in the chat. That would be great. Thank you. I'm not seeing any pop up just yet, but I want to get – oh great. We have one. I have a question. What do you mean by presenting real time data?

MS. ADAMS: So for instance, on our employment performance measures call for, of those that were employed in the second quarter and fourth quarter, what we have started doing and especially when it was built into our Key Sweep system is those are real time measures. So for example, if Natalie gets a job today, follow-up is conducted with Natalie today, tomorrow or within the next couple of days and it's determined that she has been employed. And that is entered into our system on the data that contact has been made and so that we will be able to pull from our system the exact date that Natalie got employed and post it on our dashboard.

And then what we do with that information is there's a report that's submitted to the dashboard once a month and we take that information of real time employment and then we actually match that to our new hire data. So it's all those that are employed and then all those that have been verified to be employed.

MS. FORLAND: Great. Thank you. And we have – let's see. We had a couple more questions come in. I'm curious how many people are using Tableau? I skipped ahead a little bit but that's one of them. So curious, so for those of you who are using Tableau, feel free to say in the chat that you're using it and even maybe your contact information if you're comfortable.

Let's see. Is there an example of a state where all four core partners aren't in the same agency? I can say with certainty that I know that that is a yes. But please in the chat, also respond to your colleague's question. Great. I see some people responding about Tableau. For those of you states who are on the call with us presenting, for those of you who do not have all four core partners in the same agency, could you speak to that and tell us a little bit about what your organization looks like?

KIRSTEN ROWE: This is Kirsten in Virginia. We're probably the exact opposite of Kentucky in that adult education is in one agency, Title I is in a separate agency, Title III is in another agency and the VR program operates in two separate agencies. So it takes six agencies in Virginia to operate all four titles.

MS. FORLAND: Anybody else want to comment on that in terms of their structure? Kirsten did a great job of showing us the opposite as she pointed out.

MS. LAMB: This is Megan from Arkansas. And so, as of July 1st we all moved into the same agency but before that, so during the cohort we were separate. And like Virginia, we had adult ed was one agency, workforce for Titles I and III were together and then our two VR agencies were in separate administrations and agencies.

And so, we all had to work out individual agreements and, you know, with each agency and go through all the people above to try to get things. So there was a lot of logistics but our action plan references a lot of that because at the time we didn't know we were going to be combined as of July 1.

MS. FORLAND: Great. Thank you. And another question has popped up that kind of builds. It's similar to that is how was the process to creating your team with all the titles? Did you have data sharing agreements? Who on the call could weigh in on that? OK. I think Virginia as they talk about their state action plan is going to be talking a little bit about that, so stay tuned on that one.

I also see a question about is anyone using CaseWorthy? That's another one for the states who are on the call presenting. Feel free to weigh in but also, if you guys are doing a great job with Tableau in the chat, if you want to mention anything about whether or not you're using CaseWorthy.

And I do see the question about a link to the dashboard and I believe in the chat there is – yep. Kimberly (sp) just there has put in a link, so there's a link there for the dash, Kentucky dashboard.

New question coming up. Can anyone share their experience working with TANF partners? So for my states on the call, is there anyone who can shed some light on that? OK. We might need to come back to that one.

So as you guys are continuing to answer questions, I am going to turn things over to Virginia and we have Kirsten Rowe and Heidi Silver-Pacuilla who are with us to talk a little bit about the work that they have done. Please keep your questions coming in, questions for Kentucky or Virginia or more general questions because we are getting closer to where we're going to open up questions about the whole webinar. But let's hear the great work that Virginia has been doing.

HEIDI SILVER-PACUILLA: Good afternoon. This is Heidi Silver-Pacuilla. I'm the adult education coordinator in Virginia and I participated on the cohort representing Title II. Virginia is a recipient of a grant from DOL for system integration that allowed the four titles plus DSS, which is our TANF agency.

And as Kirsten said, we run through six different agencies with separate data systems, but we're using this DOL systems integration grant to create a common referral portal. And the referral portal will help us address a couple challenges on our way to realizing the no wrong door approach to WIOA services. We know that each agency is referring clients to other agency's services, yet workforce practitioners had no systematic way to track referral outcomes and verify those referrals or potential co-enrollments.

The timing is fortuitous because we have also launched a brand new, a new brand for our one stop system called Virginia Career Works. And through the work of implementing a new brand with consistent naming and messaging across the state, we are working to present as a unified workforce development system so that clients do not need to understand the WIOA terminology or agency terminology in order to get help furthering their education, training or employment.

 Not only are we looking forward to realizing fully the benefits of the customer and practitioner facing referral portal, but us state agencies more to the point of this afternoon, we are looking forward to the analytics we'll have to use in program improvement efforts and in describing the effectiveness of the system.

The work was made possible by new legislation that removed some barriers to data sharing. This legislation established a chief data officer for the commonwealth; and through this opportunity, we are establishing a data trust agreement. I think that was just asked earlier. How are we sharing data? So we're working on a data trust agreement, which is similar to the data governance agreement that powers the Virginia longitudinal data system.

 his will allow each agency's data to stay in its current system, stay secure and yet allow for real time queries to support the portal and the work that the portal is going to do for customers and front-line practitioners across the system. And now I'm going to tun it over to Kirsten to say a little more about Virginia.

MS. ROWE: Thanks, Heidi. One of the other things I wanted to mention about our experience in developing our state action plan is that, as Heidi mentioned, the focus in developing this common referral system and portal had been on, in many people's minds and certainly in the minds of our voc rehab agency, had been on enhancing customer experience. That's probably the primary driver for the development of the whole referral process. It makes things easier for the customers.

And I think that while there has been some discussion about using it for analytics in the long run, that hasn't sort of permeated throughout the agencies that are or will be involved. Adult ed is one of the early adopters. Voc rehab is going to be one of the later adopters. But it's helped us think collectively about how we might want to use the data that will be available through this referral process and portal and how we might use the data collectively to tell our story, as Rosalyce or Cynthia said earlier. It's important for us to collectively tell our story as well as individually.

So the opportunity to get together as a state came and talked specifically about analytics and data used beyond customer, individual customer services was to me one of the real benefits of this cohort. And although I'll be retired by the time the system is in place, I know that some of my colleagues are excited for its potential.

MS. FORLAND: Great. Thank you so much. Thanks for sharing what you've been working on in Virginia. And someone asked is there a way to get the list to the states that use Tableau? Not showing up in the chat box. You should be seeing some of those chats, some of those pop up. But we will be sending out a list after this meeting too of folks who said yes, they're using Tableau. So absolutely we'll be doing that.

I've got some new questions that are coming in. Please keep coming in with your questions. One was were Perkins CTE stakeholders involved in any of the cohort states? So for any of my states who are on the call presenting, could you answer that? Were Perkins CTE stakeholders involved?

MR. GRIFFIS: This is Drew. We have used – I may need real quick. We have used Perkins data, but there are challenges inherent with Perkins data because at least in Indiana we do not get the data from our community colleges until later in the year. So when we're doing a lot of our dashboards at the end of the fiscal in August and September, we're now waiting until November, December, January for our Perkins data. So we do get it but it's definitely a challenge.

MS. FORLAND: OK. And then one of the newer questions that just came in, what platform is the referral portal built on? Is it custom built and how? Heidi, can you share with us some thoughts on that?

MS. SILVER-PACUILLA: Yeah. Virginia has a contract with three contractors and Bright Heights is one of them. They will be building it custom built, but they have also built a system like this in Colorado. So I think it's customized on something that they have developed.

MS. FORLAND: Great. Thank you. And then the question or comment from Kentucky that Perkins stakeholders were not included in the cohort. Let's see. I see a comment here. We're also looking to combine events for customers and families. I think that was just a comment from someone on the webinar. I'm not sure if there was a question there, but that was the comment that we received.

We got a question about will the information shared in this Q and A be made available for discussion as well or will it be lost? So my understanding is the recording of this will be going out and I'm getting a resounding yes that yes, it will be. There will be, this Q and A will be available. So we're not going to lose any of that and you can go back and look at that.

I see a comment from someone saying it would be great to have a Tableau users' group. That's a pretty cool idea. So thank you so much to our folks from Virginia and our folks from Kentucky.

I'm now going to open it up more broadly, not just about the great state progress you've heard from these two states, but anything you've heard today throughout the webinar, either about the cohort, about the maximizing performance data development model, or anything along those lines. Please feel free to put your questions into the chat.

And I just have an addition on the Q&A that that will be, that you can expect that within a couple of weeks. It takes a little bit of work to put all that together, so you won't be getting that one tomorrow but that will definitely be coming.

Giving a moment for folks to put in your questions. I'm hearing a number of folks saying they would be interested in a Tableau group, so that's cool. Lots of people liking that idea.

Let's see. Does somebody use PowerBI? So either the states presenting, if you want to mention that or also those of you, everybody who's on the webinar, if you want to type in whether or not you're using PowerBI because we can share that list as well.

Let's see. OK. What does the cohort feel is the better data visualization tool, Tableau or PowerBI? So I'd love to hear, so I see that Kirsten says they started using PowerBI in Virginia. I'm going to see whether or not Drew can shed some light on Tableau versus PowerBI because I know he's all about working with data so I like to use him as my Guinea pig.

MR. GRIFFIS: Sure. We use primarily Tableau, but we have started using PowerBI, especially in the case of geographic solutions base. They now have some seamless Tableau integration into their custom reports and elsewhere that we'll be able to utilize and then sort of, you know, tweak our own PowerBIs based on data being pulled directly from the case management system. I'd just say they both do the same thing. PowerBI has made giant steps and it's right up there on par with Tableau.

One thing I like about Tableau is you can get pretty far on your public version of that. So today you could just go up, go and sign up for Tableau, get your public license and you can start building in Tableau. Tableau also has awesome online training resources that are freely available right from their site. So I would say you can't go wrong with either.

If by chance you have a Microsoft case management system like Dynamics or something, then I definitely recommend PowerBI for the sort of the natural Microsoft, you know, software collaboration there. They always work better together. But otherwise, I like Tableau. It's just a straight out of the box, just start playing with it and if you get good and you want to buy a higher up version, then by that time you'll have the skills necessary to do so.

MS. FORLAND: Thank you, Drew. Let's see. Heidi, can you weigh in a little bit on this next question? Does anyone have a specific example of how WIOA performance data has been used to change or alter a policy?

MS. SILVER-PACUILLA: Well, I think it's a great question and I think if you ask it again in a year, we'll be able to have a direct answer. The data is still so new I think that we are all still looking at it. I'm in several work groups that are looking at the data and really trying to understand what we have, how it is, how it can talk across the agencies. Are we really comparing apples to apples and participants to participants? It's just still so new. We have not made changes in policy in Virginia that I can think of based on the data, but we are sure asking a lot of questions and looking at it very carefully. So I think it's a great question and we're going to get there.

MS. FORLAND: Anyone else want to weigh in on that one? And one, just one observation I would make is sometimes too it's not so much a matter of changing policies but informing policy as it's being developed so that existing data can help with figuring out how to put a policy together from the very beginning. Oh great. Carrie, you want to weigh in and add on a couple thoughts?

MS. MARSH: Sure. This is Carrie from Minnesota. I'm glad Heidi said that because I feel like Minnesota is in a very similar place where we have a lot of data, but we haven't quite moved into any policy changes. One example is the co-enrollment projects that we've been working on where we've been looking at co-enrollment between all of the four titles as well as some of our state-funded programs. So we know a little bit about how that looks like and it's going to be used to inform some of our processes and policies, but we're not quite there yet.

MS. FORLAND: Great. Thank you, Carrie. And feel free to continue putting your questions in the chat as you have questions for the states or questions about the development model. OK. Did any states offer training to their staff on how using IT, on how to use IT to help maximize performance data? So are any of my state presenters willing to weigh in on that? Are you offering training to your staff on how to use information technology to help maximize performance data?

MS. CUMMINS: Yes. This is Natalie from Kentucky. I can say that, you know, for Title II in Kentucky we do provide a data quality training every year for those field staff who have to do work with reports and for directors and things like that. So we do get that information out on a local level and show them the appropriate reports to pull from our data system as well as how to effectively manipulate those in, for example, in Excel just to get at maximizing their own program performance.

MS. FORLAND: Great. Great. Thank you. I see another one pop up on a similar topic. How are people identifying what technology to use and how to use it? And then I'm seeing, let's see, a specific question around Indiana interested in Indiana's engagement rate metric. Has anyone used metrics like this to track outreach to barrier populations?

On the local little level, how would you deal with small user populations versus more robust demographic data? Indiana, can you speak a little bit more to that even if you haven't gone in the direction the question is, but just to talk a little bit more about your engagement rate metrics?

MR. GRIFFIS: Yeah. The engagement rate metrics is an interesting one. It's scientific-ish. But basically, we wanted to use some of the resources that we had at hand from the BLS as far as the surveys they were doing through local area unemployment statistics etc. And so, we wanted to get this count of the amount of unemployed and the amount of underemployed I think that you, or you'd file a – I'd have to look into it.

But we take these two numbers. We added them up to get out population of people that should be used in the workforce system. We then took all of our ICC (sp), all of that, all of our case management data and we tracked who went into our AJC during that month and who participated online. You know, whether it was Title I, Title III. Maybe it was a local program we were tracking through our store counter technology. And so, we were just trying to get a picture of everybody that touched the workforce system as a percentage of the total amount that DOL said is unemployed and underemployed in the state of Indiana.

Now, there are challenges, especially when you're talking small populations. And if you wanted to get into the demographics of these people, there are more rural economic growth regions. Obviously, we can't put a whole lot of barriers around these people, our demographic information because it would be subject to suppression as we get more granular with the data we're looking at. So we have general suppression rules. We follow those generally. We're looking at the economic growth regional level, so we don't have to worry about suppression.

MS. FORLAND: Great. Thank you, Drew. And another question I've got coming up here do any of the states who are participating on the call provide performance data to local workforce boards on a real time basis? So this is one that is directed to any state that is here on the call. I'd love to hear form state presenters on the call, but also feel free to answer in the chat if you're just participating with us. We're putting you all to work too helping answer each other's questions.

And the next question I see pop up are states able to extract data by targeted populations served such as veterans and migrant and seasonal farm workers? And then the question, one more question. Did the cohort complete the self-assessment tool? If so, what was the primary resource needs? Does any brave folks who are – yes please.

MS. ADAMS: This is Rachel from Kentucky with regards to the question are states able to extract data by targeted populations served such as veterans and migrant and seasonal farmworkers. We were not up to the point of when we created our new case management system that we launched. We actually had those two programs in addition to others built into the system so that we are able to extract that population, those targeted populations in the data.

MS. FORLAND: Great. Thank you. And Carrie, it looks like you might be able to weigh in on providing data to local boards.

MS. MARSH: Yeah. This is Carrie from Minnesota. We use Feature Work Incorporated (sp) to provide a dashboard and some detailed data, both on the performance as well as the client level information to local workforce development boards.

It's all securely provided, but it's not real time data. I'm not sure what the question intended in terms of the real time. It of course has the lag that we see with our UI or wage detail information, so it's about six months after exit data for quarter one information. I know some other states are doing some other things based on whether they have access to I've forgotten what it's called, the real time information.

MS. FORLAND: All right. And then Kirsten, could you speak a little bit to your state doing the self-assessment tool?

MS. ROWE: Yeah. So we did a, as a team did a relatively informal kind of test of the self-assessment tool. And certainly one of the resource needs identified in Virginia as well as resource needs that were identified when we were first starting to grapple with the idea of a tool when we were together in Washington, one of the key resources needs that was identified across multiple states was staff expertise in multiple ways. Staff expertise in handling data and the technology for securely and confidentially merging data, the staff expertise for appropriately analyzing the data. So that was a pretty consistent theme in terms of resource needs.

MS. FORLAND: Great. Thank you, Kirsten. And then let's see. I have another question. Outside of these cohort activities, are states documenting these special project dashboards and promising practices to share with other states?

So I'll just speak quickly in terms of the cohort. I mean one of the things that was important about this cohort was for the six states to be able to share those things with each other. And the idea too is with the performance data development model, it's for that to include resources to share information as well. But happy to have anyone else weigh in on that in terms of best ways to share promising practices across states.

I think that that's one of the key roles that Department of Labor has played too in terms of offering technical assistance and convening groups like this. And once again, this was an effort that was sponsored not only by Department of Labor, but Department of Education. So across all four titles, two agencies to be able to provide these forms and this very webinar itself to be able to make sure that when great ideas are popping up in one state, nobody else has to start from scratch in trying to do similar work.

MR. GRIFFIS: Hi. This is Drew. I'll add that across the state of Indiana, all of our Tableau users are in a single Tableau user group and that's been a great resource. And the user group is actually through Tableau itself, so you're just going ton to Tableau public, you're logging in and you can have a private group within this public space. I think that'd be a great place to start.

I also, I'm not sure what resources we might have available through WorkforceGPS, but I'd love to be part of that as far as, you know, just a cohort of colleagues that are just sharing ideas and best practices. And so, you know, I'd look forward to getting with anybody that would be interested in user groups and working, you know, with our partners at DOL and elsewhere to make sure we have this sort of resource that everybody can benefit from.

MS. FORLAND: Thank you, Drew. And I see a couple more questions come in. One question was about how real time was this real time data. Let's see. Are internal dashboards shared with all staff and which states have been successful in compiling data from all four title agencies? I'll open that to some of our state performance, sorry, state participants on the call.

And let's see. I see another question. Are any states aware of the DOL-funded workforce in these state technology profiles, the solutions marketplace and learning academy being created for WIOA program partners? So now there's a partnership with us and the Department of Labor where they do a lot of work around supporting technology work and efforts and including training and technical assistance. So in fact, if we want to, maybe if there's someone from workforce on the call, they could post the link there to that website so we could share that with folks.

But about success in compiling data from all four title agencies, are any of our states – oh. I'm sorry. I'm out getting ahead of myself. Megan, thank you. You'd love to talk about internal dashboards. Please share.

MS. LAMB: So one of the things we do, especially with our internal agency data, we're still working on some of the kinks with our partner data. But as we routinely share when we do trainings, we take that data out, present it and break it down for our staff just so they can see where it's coming from in our case management system. But we also do monthly data reports that go out to all of our staff so they can see how they're progressing through various performance measures and internal measures that we have for them.

MS. FORLAND: Great. Thank you. OK. Let's see. Any other questions or any other comments our state presenters would like to weigh in on?

Compiling data across all four titles, I will say something. There is question about how real time is the real time data. And that really is an interesting question because it kind of depends would be what I would contribute to that as an answer. But in terms of summarizing real time data, you talk about it as job postings and various services you can use for those to get job posting data and that being real time. In some cases with case management information it's, you know, what's going on right now with a customer and being able to see that in real time. So I think it largely depends upon the data.

And it looks like we've got the workforce info website posted so that's great.

MR. GRIFFIS: I'd just like to make a comment on real time data.

MS. FORLAND: Great, Drew.

MR. GRIFFIS: Real time data is the biggest challenge by far. The issue is when you're making policy and trying to make policy decisions based on outcome data, which is reliant on UI wage data to see if the client has found a job and, you know, what their median income, what their wage change, etc. is that you have the six month lag. But then you have to weight another six months to go two quarters after exit. So if, when you're doing outcomes you're always a year sort of in the rears of that real time understanding of what the client is doing now.

So it's difficult to a year from now look at year old data and say oh, we need to make changes here because it's going to be another year before we see whether or not those changes have any effects. So I think that's really where a lot of the innovation in this area is going to take place is how do we get to real time data and, you know, how are states I guess, you know, whether it be through surveying, text, some way that they're getting this data directly from the clients because as it stands today with our current system, there's really no way to have real time data as far as employment outcomes.

And the availability and the ability to use new hire data is kind of hit or miss. Some states can. Some states can't. We can't, so that's continually challenging. We're always going to have this how do we get employment data quicker.

MS. FORLAND: Great. Thank you, Drew. And with that, I want to thank all of you who have participated today. We had I think close to 500 participants at one point, so clearly this is an area that folks care deeply about wanting to be able to communicate and tell their story with their performance data.

I want to give a big thank you, the biggest thank you to our state presenters who joined us today, Megan Lamb, Drew Griffis, Natalie Cummins, Rachel Adams, Carrie Marsh, Heidi Silver-Acuilla and Kirsten Rowe. Thank you so much for the work you've done and for sharing all of your insights with the participants today. I want to thank my colleague, Rosalyce Broadous-Brown.

And I also want to give a big thank you to Shelia Lewis who's with us today from Department of Labor and to her colleagues as well at not only the Department of Labor, but also the Department of Education who sponsored this really, really important work. So with that, I will just say thank you very much and I'm so very glad you all could join us.

(END)