**WorkforceGPS**

**Transcript of Webinar**

**Beyond the Dollars: Sustainability in TechHire Programs**

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LAURA CASERTANO: So with that I'm going to get things started. Again, I want to welcome everyone to today's webinar, "Beyond the Dollars: Sustainability in TechHire Programs." And I'm going to – if you haven't done so already, please just again introduce yourself in the chat in the bottom left-hand corner of your screen.

And I'm going to turn things over to your moderator today, Ayreen Cadwallader. She's a workforce analyst with the U.S. Department of Labor, Employment and Training Administration. Ayreen, take it away.

AYREEN CADWALLADER: Great. Thank you so much, Laura. And welcome everyone for joining us today for today's TechHire webinar on sustainability planning. I do want to acknowledge that Robin Fernkas, who's the division chief for the Division of Strategic Investments – or DSI, as we like to call ourselves – also Danielle Kittrell, also at DSI and a core member of the TechHire partnership grants, that are joining me here today for today's webinar.

We definitely want to take this time to acknowledge and recognize the 39 TechHire grantees that were awarded these grants four years ago really to achieve the vision of creating a young workforce, including those populations with barriers to employment, such as individuals with prior records, individuals with limited English proficiency, and individuals with varying levels of ability, with the technical skills needed to work in technology careers.

It is bittersweet to know that this is our last all-grantee technical assistance webinar, especially for those of you that do not plan on a period of performance extension and will be ending your grant at the end of this month.

So we do want to take this time to thank all of you for your individual efforts in the projects – your TechHire grant projects – and what you've been able to achieve with your grants to serve and enroll participants in training that leads to a career pathway, the work that you've done in providing case management and supportive services to help your participants complete and earn credentials, and certainly your efforts to help those participants gain meaningful employment.

We do really hope that through this grant program you were able to develop and implement innovative strategies to help youth and young adults enter a career pathway that uses these technology skills. That was the main focus of this grant. And we also hope that these are strategies that can be utilized for other industries and occupations, especially other target populations with barriers to employment.

And so lastly, we know that these were partnership grants and we certainly hope that the partnerships that you established with the TechHire grant program can live on longer than the four-year grant period of performance, which certainly leads me to the focus and purpose of today's webinar on sustainability planning.

We just want to encourage again and let you know that sustainability is more than just finding new money. It's maintaining changes in the way you design and deliver your programs, whether it's training, it's partnerships, or new internal processes and procedures.

What makes an effective sustainability plan is really about taking elements of your program design that was successful. And, just because you might not be able to keep all of your proposed project with a TechHire grant, we're sure that there's elements that made the most impact to your students and/or participants and focus your future planning on these components.

We do know that a good majority of grantees did plan for a period of performance extension, so this would also be a good window of time to take these next 3 to 12 months to craft your – to finalize your sustainability strategies moving forward.

And the focus of today's webinar is to feature a sustainability toolkit that you can use with your teams and partners. We hope that this guide will assist you by walking through a five-step process and providing easy-to-use action tools to begin the larger conversation around sustaining your work.

So with that, I could certainly turn it over to our colleagues with Maher & Maher and Jobs For the Future, Christian LaGarde and Matt Poland. Christian, I'll turn it to you.

CHRISTIAN LAGARDE: There it is.

MS. CADWALLADER: There you are.

MR. LAGARDE: Hello, everyone. Hi. The use of video. First time ever. It's (always ?) happening. Welcome to be here. Glad to be here. And I echo Ayreen's point about it not being over. It's not over. The grant period of those three to four years that you have spent so much energy and time developing those successful programs, it isn't over yet. There's more to come.

Some of the things that you did during your grant period will live on and will continue to show success for your institution, for your organization, for your community. We want those things to stick around, which is why we are having this conversation today and why we developed the sustainability guide.

So what we're going to do today, we did some introductions and we're going to have a poll question pop up in a second about sustainability. And we have another one a little bit further down. We're going to talk about how to think about sustainability and how we have approached this guide. How we think about sustainability and how we developed some of the elements of the guide.

Designing the planning process, that's a big part of not just the implementation and the execution, but ensuring that you design it in a very intentional and strategic way. And by doing that, by using the guide that we're going to share with you today, you will be able to design that; and then from that, implement and execute that plan.

We're going to dive into each one of the five elements of the sustainability plan that we discussed. Matt is going to share the funding analysis tool; he's going to do a demo of that tool that we created. So not only are we providing a guide, we're also providing this funding tool that will help think about ways to braid funding or look at other ways of aligning funding across your organization or institution to continue the work of TechHire.

And then we're going to do some questions and answers. Now, you see Q&A all the way at the bottom, for the end. But what we're going to do and when we're – how we're going to do this is as we go through each of those five core elements we're going to pause.

And in the chat we're going to go ahead and please ask you to either ask the question or talk about a strategy of something that you're doing or something that you feel is something that may be innovative or a way that you're approaching it. There's no bad comments. There's no wrong answer.

What we want to do is sort of hear from you as we're talking about the guidance, sort of our thoughts and processes, we also want to hear from you about how you may or may not be approaching some of these elements. So after each of these elements we'll sort of pause to maybe address a question or address a comment, and then move on to the next one. So even though you see Q&A at the end, we are going to pause after each one of the elements to talk with you and to address some of those comments or questions that you have.

So that's our agenda. For today or objectives, learning how to design that sustainability process, and that guide is going to help you do that. We'll review those five core elements of sustainability that we have designed. And we're going to talk about that, how we came up with those five, why we came up with those five.

You're going to be able to discover these new tools, the funding analysis tool and this guide. And then Matt's going to dive deeper and do a demo into that funding analysis tool to let you – help you understand how it can be used, how to put in some of those functions and features of the tool that we're going to show you today and give you today.

Actually, as a matter of fact, you can download it – not to distract you, but in that file share box that you see right there, you'll see can down – you'll be able to download that Excel sheet and the PowerPoint and the guide itself. So if you want to do that now, you can do it. Or you can sort of wait until the end and then download those files and maybe you want to have it open as we're talking through it. Either way, they're right there for you – they're right there for you to download.

So to the poll question. The first poll question that we have for all the attendees are, "What are your organization's biggest concern with sustainability?" Is it ensuring organizational capacity in the long term? Is it maintaining those relationships – those very great relationships – that you established throughout the time of the grant? Is it securing more funding? Or is it preparing for the future of work?

And boy, that future of work has really changed in these last three months and what that potentially could look like in the future. Or is there something else? If it is something else, put it in the chat.

So we'll give you a couple seconds here to go ahead and to answer those questions. And if you have something else that you don't see on that list, go ahead and throw it in the chat, if you will. (Pause.)

We have a winner. But we also have some other interesting points where – and I don't know if you can broadcast. Everybody has voted. I see there's still some numbers climbing in. But if you want to go ahead now and, Laura, if you want to broadcast those results so we can see.

As we would expect, as Ayreen would expect, as everyone on this call would expect, securing adequate funding was the – is the top concern as it pertains to sustainability. However, there are some other concerns that organizational capacity, preparing for the future of work, and maintaining those partner relationships are also in there.

So at 56 percent across the board, that's good, and that is – that brings us kind of the next – to where we want to take this discussion and think about what – how to think about sustainability not being solely about funding.

Yes, 56 percent of you just said that securing adequate funding, thinking about how else can you fund what you're doing. What we also know, we're very mindful of, is that TechHire was focused on training dollars for the participant, for the student, for that participant going through. So it was very funded (sic) on funding yourself. If anyone is a program coordinator or a manager, that funding paid for you to be part of the grant and to lead this grant. So we understand that funding is money is important.

But there's also additional ways to think about sustainability when designing that plan. So as I was saying, sustainability is more than funding. It's about building that capacity and the infrastructure, the ways and the policies and the ways that you are now doing business that you may have not been doing business before. That's big. Could that sustain without funding? Potentially. A majority of what you now have accomplished or a process that is now in place could be part of your sustainability strategy.

Those partnerships that you developed with employers, with workforce development boards, with community colleges, with community-based organizations that may have not existed before, or got enhanced, or more than ever after these four years, those partnerships are stronger than ever. Of course you want to sustain those. It's a big part of the success of your grant. It's a big part of the future success that you'll have. So of course you want to sustain those partnerships. Those probably don't save money and if anything those partnerships can lead to money. And we're going to talk about that in a minute.

Funding and resources, as we were just saying about sustaining, about securing adequate funding or finding another way to continue funding and resources. Understand that that is part of it and we'll discuss that. It's why we developed that funding analysis tool and there's a whole component about funding analysis.

Stakeholder outreach and telling your story to sustain whatever activity or sustain the activities of your grant. Telling your story and being able to express the value of the project, of what you have been doing in the past, is tantamount to be able to sustain anything. And to be part of the plan, you have to have a good selling point, you have to have a good pitch.

And it's more than just data too. We're going to talk about that. It's more than just the data elements, the outcome, the WIPS report and those sorts of things. Sure, you may – you have good employment numbers and good outcomes, but there's so much more that happened throughout. So doing that stakeholder outreach and telling that story is so important.

And preparing for the future work. This is again – we're going to go into depth on many of these. But when we were thinking – when Matt and I were designing the sustainability guide, thinking about sustainability, we wanted to take this holistic approach and think about all the ways and means of how a program can be sustained over and above – (inaudible).

The planning process, as we were talking about, the design, key part of it, right? So plan, then execute, evaluate, and then sustain. So this part is what we're providing you today and what we're talking with you and how you can use this guide, is to design that sustainability plan. Design that sustainability strategy that you'll execute.

Evaluate and sustain. There may be some things that may need to be tweaked or may need to change. There may be things that you realize throughout this planning process that need to be – that need to pivot a bit. Maybe something you were doing is costly, it is a little bit more on the heavier financial side, that can be dialed down to give room for something else. So that's where that evaluation comes in. And then you're in full sustainability mode.

So as you can see, however, it is a constant process as well. So there's always chances for change. There's always chances for pivot. So that's a part of – that's a mindset of the planning process.

When you're thinking about who should be involved, not just those internal staff – (inaudible) – it's not just yourself and the leaders at your institution or your organization or your community college; it's those external partners as well. It's those workforce development boards, those CBOs, those – potentially if you have intermediaries. It's all those partners. It's the education workforce boards that you've worked with over the course of the grant that need to be involved.

So when you sit down to develop your plan, don't just have it be staffers at your organization. Have some outreach. Have employers be at the table. Have your employer partners be at the table. Have those (voice ?). Have as many stakeholder as you can being at that table because they may have a link, they may have a connection, they may have an idea, they may have a funding opportunity that you don't know about.

So bringing those external partners is so valuable. And having that buy-in from the outside helps those internal staff members to be excited about what's possible, what could be next. And when you have buy-in from both sides, you end up with a very good project.

In the planning process – I'm not going to go through every one of these questions. And you'll see throughout this we have some guiding questions, some guiding questions in the guide.

But the one thing – the one that I want to definitely talk about is on this slide, in particular as it is to planning process. It's how do our innovations and the program elements that we want to sustain – may not be all of them; might be a couple, a handful – how do they connect or align with the state, regional, and local strategic sustainability planning?

And what we mean by that is that if you can align it – if you can align what you're doing within TechHire with the governor's office, if you can align what you're doing with your regional sector strategy, that will then yield a lot of strength and possibilities for you to sustain certain elements. Looking at those other things that are happening within the state or within the region or even within your own locale, if you can align it, it can be sustained. And that's a sharing of funding, that's a sharing of resources, it's a sharing of a lot of things.

Thinking outside of your organization and your institution and outside the building that you're in – even though no one's in a building anymore; they're home – but thinking about it in that way and aligning it to those big overarching strategies that are within the state has shown – and we've seen this on multiple occasions, on multiple initiatives. When you're doing that, the chances of success and sustainability is incredibly high.

So when you get a chance to read through all those questions, I just wanted to point out one of those and I'm going to do probably one of those throughout – you'll see I'll pick out certain questions and things that I want to highlight.

Before we get into our guide and before we get into our elements, we wanted to share this online resource that we found – that Matt actually found – the Program Sustainability Assessment Tool. It was created by Washington University in St. Louis. It's a great – it's interactive. Not that ours couldn't be and not that ours isn't. It could be shared over and above.

But this PSAT is free; so you can download it for free. It's something else we wanted to make sure that you knew. You don't have to pay for it. We're not endorsing a product because it's a free product that you can download and use some of their thoughts and their guiding questions and how they structured their Program Sustainability Assessment Tool to start to think about ways. You can integrate that into our guide, if you will.

But what we like about it, why we wanted to share it, is it's very interactive. You do create a login and you can basically work on it in a remote fashion, which we thought was great and relevant to the times now. So that PSAT and the link will be live when we send out the PowerPoint. You'll be able to click that hyperlink and get to it. But that was an interesting resource, an online resource that we wanted to share with you.

So let's talk about the elements that we put into this plan. And this sustainability guide and these core sustainability elements were something that Matt and I and the team had some mindsets around. We've seen projects come and go. We've seen too many projects come and go. You know, H-1B projects or other projects or initiatives from Department of Labor. What did we see happen?

What did we see that was successful in those other projects and how can it apply to TechHire? We wanted this to be specific to TechHire. And we kind of did a stand, so to speak, of what else was out there? What else was being used? And then some best practices and some things that we wanted to bring to the table specifically for TechHire. And that's how we designed and pulled in these five elements.

These five elements are: organizational structure and sustainability capacity; partners and networks; funding and resource analysis; stakeholder outreach and telling your story; and preparing for the future of work. I touched on these before but I wanted you to get a graphic of what are the five core elements of what we thought a good guide would be – a good sustainability planning guide would be for TechHire grantees.

So these are the five and we're going to dive into each five of these. I'm going to take three of them and Matt's going to take the last two. So let's dive into the organizational infrastructure and sustaining capacity.

I'm not going to read all these questions. I'm going to pick one and we're going to talk about it. But the one that I want to stress on, on this one, is what role do partners play and what is their capacity to help the program achieve its sustainability goals? In line with what I was talking about earlier.

At the same time, this may be a difference of conversation that you're having. Even if your organization doesn't have the infrastructure, it doesn't have the capacity to do it, as a collective you do. As a group, you might. So when thinking about sustainability in that way, what role do those partners play? There's a sharing of this sustainability. There's a potential of sharing of the sustainability.

You own it now, your organization owns the initiative now, that doesn't mean that it has to own it in the future. This collective mindset that these organizations could have could generate some interest in developing that and creating that capacity as a collective.

So if your organization – like I was saying, if your organization is the lead now, it could continue to be the lead. Yet at the same time, those partners have a bigger role now. You're the fiscal agent and you're the lead, but what could it look like in the future and what roles do those other organizations play?

If you feel that your organization doesn't have the capacity to do it or isn't prioritizing or is limited in that infrastructure, what does that infrastructure look like when those partners have an elevated role? And more than likely, they will take that elevated role because of the value that TechHire has brought to the region, to the state, to the organization, to the community, et cetera. So that's a big one for that one.

There's some resources – in each one of the five core elements we also put in some resources that we want to share. Some of them white papers. Some of them are other guides and elements that you can do to help build your knowledge base on sustainability strategy and diving deeper into some of the – into the five elements. So that was number one.

Number two is partnerships and network. So the one thing I want to bring up on this one is about who are your employer champions and how to harness their strength and expertise for sustainability. So as you're thinking about – and we have employer champions, but it could be champions, period. It could be the champions that includes you or includes someone else in the organization. It could be your president. It could be the director at the board. It could be your – who knows who it may be?

But those employer champions or those champions, whoever's going to be ringing the bell after the grant end, that is who needs to carry the torch. That's who needs to be the champion. So when you think about those partners – when you think about partnerships in that work, if it isn't going to be – if it isn't you or it is going to be someone else to carry that, who are those champions and how to harness their strengths to be the champion.

And if an employer can be the one, if an employer can be the champion for that, to lead in that sector and to bring other resources that's bringing their financial backing or their financial pieces to it, it just – that's a big part of thinking about how to sustain that through your employers.

And if anything, it's valuing them. As we know, with TechHire – (inaudible) – those employers. They're the winners – besides the participant, employers are the big winners. They should have an elevated role and they should potentially have a stake and they could be an employer champion.

So that's one of the ones. Again, many questions on here to think about and just get your brain moving and shaking on how to think about partnerships and network. How do they play into sustainability?

And we have some – as in each one of the guides, we have some additional resources, the Career Pathways Toolkit, which is – we used that even in the TAACCCT grant. That was such a great guide and workflow for us to think about how to develop partnerships and pieces of that postsecondary partnership. YouthBuild, a lot of DOL programs that have very good, strong sector strategy partnerships or partnership networks. So we had some resources in there for you.

And then the third one is the funding resource. So here we are to the funding.

So before that, let me pause for a second. I said I was going to pause after each one. Is there any thoughts or comments? And I'm going to go back to partnerships and networks. I'm going to leave this slide up for a bit.

As you see or read any of these questions, do you have – is there something that you are thinking as far as your partnerships and network or how they're going to play a role in your sustainability strategy? Feel free to throw it into the chat box. You don't have to call out any names or say, yes, they're going to give us $18 million, or whatever.

But do you have someone that is external to your organization that you feel that is going to be a part of the sustainability – of your sustainability moving forward? Or do you have any questions about the two that we covered so far?

Mark is typing in. I'll give Mark a second about that. "For us it would be Department of Corrections." And Mark, Thomas from Polk State College there in the state of Florida has done some great work with Department of Corrections in their work. They're thinking about going outside of the college to do their own training, or hiring the corporate college at Polk State to do training on their own dime after the grant's over. So it's a good success story. Thanks, Mark, for bringing it up.

Those other agencies, it could be big state agencies like Department of Corrections or other agencies in your state that could be big for the future and thinking about what they – how they play a bigger role and how they can help sustain. Thanks, Mark, for that.

On to funding and resource analysis. This one, as you saw through the poll and as we talked about – because we talked about this in the beginning of this about funding. And thinking about – because 56 percent of you said funding and thinking about allocations of funding and thinking about other sources. How could it be in there?

This is the one question that I want to sort of focus on, on this one is, what federal, state, local, private program resources are available for funding? What are those requirements and/or restrictions for those sources? And that's when we start to think about braided funding. That's when we start to think about other programs that are happening within the community college space or in the nonprofit space or in the workforce space, over and above WIOA, over and above those other grant initiatives that are out there. What other funding is out there that could help to establish a good foundation for the future of what TechHire has done?

So when you go through the guide, when you start asking those questions, when you talk about and when Matt shows the funding analysis tool, you'll see how that question plays into what are those things out there?

The second question may be the biggest concern, about what are the requirements and restrictions of those sources? We're very mindful of, when thinking about using different funding streams, of some can't cross. Some beans can't cross and some can't be used for certain things. There can't be duplication of funding, double-counting and double-using of funds and things like that. So it's very important to understand that.

And in that funding analysis tool and in in even our guide, there's pieces and parts of that to make sure that you understand those requirements, you understand those restrictions. There's no hesitancy or there's no compliance function or feature that could get you in trouble for thinking about it in that way.

And with that I am going to send it over to Matt to cover the next two and to give us our guide. Off to you, Matt.

MATTHEW POLAND: Great. Thanks, Christian. So yeah, I'm going to move on to our last two parts. These are some of the resources for funding and resource analysis, including the funding analysis tool that I'm going to walk through a demo in a moment.

But first, stakeholder outreach and telling your story. So this kind of is going above and beyond, I think, the partnerships and networks. You want to ensure that the key state and regional leaders and workforce boards and foundations, they're aware of the benefits of your program and what's offered and how they can connect with you.

This is also kind of marketing. You want to continue your outreach to prospective participants to let them know about the services you offer, plan to offer in the future. So kind of thinking about how you're going to continue your outreach efforts.

And sustainability planning process is really a good time to look for opportunities to enhance the outreach that you're doing with solid market tactics and effective storytelling. Perhaps your services are going to be changing somewhat; you want to make sure that messaging is right. Or you're going to be offering something new and you want to continue to engage your audience. You don't want it to feel to your audience as if the program is coming to an end. You want them to know about the next thing or how they can continue to engage with you.

So again, as Christian kind of walked through earlier, we have guiding questions in each of these for how you can sort of approach these conversations. I sort of think of them as a way that you could design a meeting using these questions.

Like, what messages do you want to convey? What will your strategies be – how will your outreach strategies need to change? What forms of communication are you using and what do you want to use, or how you want to make adjustments there? And so this can kind of guide the meeting that you have when you discuss this part.

A few resources I want to highlight we found really great. And this is kind of a very comprehensive guide by Cause Communications and it's targeted for nonprofit and public service agencies.

It has tips on how to conduct audience research and it has multiple steps and parts to it. It's actually pretty long and thorough and we thought was a really good resource for outreach in the nonprofit and public space. That particular one we also have a note in the guide, that's the only one I think you have to provide a name and email to download it.

Want to give a shout-out to the Skills Commons. There's a storytelling network. And so Skills Commons was created under TAACCCT. Many of you might be familiar with it. There's some really great storytelling resources in the storytelling network. Skills Commons is also a great website for curriculum for community colleges and other resources for the colleges.

But on the storytelling network there's a rubric for what – rating effective stories. There's videos. There's examples of effective storytelling. There's an online community that you can join. I just wanted to make sure that you guys are aware of that one.

The next one, "Maximizing the Power of Social Media," just wanted to bring back an oldie but a goodie. It's not that old, maybe six months old. We put out a piece that featured one of the grantees – (inaudible) – Community College and what they were doing and their social media strategies. And it was something we thought was really effective – (inaudible) – Facebook strategy, in particular, that would be good as outreach.

They really blew up their outreach and had a whole lot – they were starting to fill out their orientations a whole lot more after they really got the social media strategy right. And we thought that was worth sharing and put that in the piece there. So there's a link to that.

And then finally, the "Elevate Advanced Manufacturing" is a really good example of a statewide integrated marketing campaign they did in Iowa. And it's a good example of how partners can kind of work together for sort of a cohesive and combined effort for outreach and marketing, as we wanted to highlight.

And the fifth area that we cover in the guide is preparing for the future of work. So this is one is near and dear to my heart in trying to pay attention to the future of work and how organizations need to be thinking about this and preparing for it on a regular basis.

I'll just note that while there's – we've been going through several years of trying to figure out where business and industry is at with automation and those kind of things, that with the COVID pandemic we may have hit an inflexion point. There's some estimates out there that this is a time when employers might start automating. When they're on the cusp of thinking of automating processes, this COVID crisis may have just given them an opportunity to do that.

And something to think about and pay attention to and talking to your industry partners about, like how they're thinking about this and how they're going about automating and how that's going to impact their workforce and their skill needs. I think it's key to sustainability, but it's key to just having good programs going forward, trying to stay ahead of that.

So just wanted to point out here that tracking new technologies and helping workers develop employability skills, supporting entrepreneurship, are some of the approaches that are effective right now. And a few – these are, again, the list of guiding questions for a conversation.

What technologies do you know about that are impacting the industry? How do your training programs help participants develop employability skills? Otherwise known as 21st century skills, like collaboration and problem solving and systems thinking, digital fluency. Are there opportunities to work with employers in your target sector to better understand how their jobs and skill sets may change?

And what guidance can you solicit from your industry partners about how their jobs and skill needs are changing now or will in the future? What we really encourage is not kind of waiting to see what happens with the industry, but be an active participant in those discussions with your industry partners on how they're making decisions about automation and gig workers and all that kind of stuff. Because I think they would value your input and your insight into how that affects the workforce and the skills they need and how you can be part of developing that for them.

The resources for this part – McKinsey has been consistently putting out a lot of great material on this, so we wanted to point this out. There's a couple of resources (related ?) to McKinsey that are linked in the guide.

"The Future Work in America: People and Places" was a mid-2019 update to a real seminal piece they put out in late 2017 about automation that really goes industry-by-industry and job-by-job about how things are going to be automated that I think is a kind of starting point.

"The Future of Work," again, something we put out for TechHire that looks at specific technologies and how they might impact H-1B industries.

"New World of Work" is a great resource for employability skills. They have curriculum for both young people and adults that you can plug into your program to help people with developing those. Because we really feel that's an important part of being prepared for the future of work.

And then "Developing Future Talent" was a project we did at JFF. We brought together some businesses and talked to them about automation and gig work and how they were making decisions around it. And we have sort of a set of recommendations, similar to what I've already shared about being involved with – in the decision making process with them. We found these businesses with value and needed that kind of input and that partnership from their nonprofit partners, their nonprofit talent development partners.

So all of this we – in the toolkit we provide a sustainability action plan template. So it's both available in the toolkit and it's available as a separate downloadable document that's down here in the file share that we pointed out earlier.

So what you'll find there is a template that looks like this. It goes category by category. There's some examples in there. It's fully editable. You can take out the examples and put in your own material. You put in the sustainability building block, the action steps you want to take to get there, person responsible, timeframe. Typical planning things but it's meant as a complement to the guide.

So as you're going through your planning meetings with your partners, with your internal staff, you can use this to put down the notes and the next steps for how you're going to manage your sustainability.

So before I go into a quick demo of our funding analysis tool, which comes as a compliment – it's also downloadable there for funding analysis – wanted to do a quick poll on how complex your organization's financial picture is. So yeah, you'll see the poll coming up now. And if you could click on one of the options there. (Pause.)

And as I suspected, "very complex" is coming up to the top already. (Pause.) OK. So we have 11 in very complex. One person not sure. Everybody else does not think their finances are simple, which is understandable. I'm sure they're not. (Pause.) OK. Maybe a few more seconds. OK. There we go.

So yeah, we anticipated that most of you have a fairly complex financial picture, which is why we wanted to develop a tool to help you with taking a look at that and trying to understand where your gaps in your resources are.

So I'm going to move into sharing my screen and giving you guys a quick demo of the tool we created. (Pause.)

OK. So this is what it looks like. And it's actually an Excel template. And hopefully you guys can see – I'll do my best to move around this. We also uploaded a demo, so there's a video you can watch that goes through a more thorough demo. I'm going to do a quick version of that now.

This is the first tab, the instructions. And as I was starting to talk about before, what we really wanted to do is help folks with planning their budget for up to six programs and six funding sources. So when you have a complex financial picture, trying to figure out sometimes where your gaps are and where you have extra funding can be difficult. That information tends to be in different places.

And instead of having 10 Excel documents open at any given time, and moving between grant agreement documents and that kind of thing – I know when I was a program manager – I was approaching this from the perspective of being a program manager in the past with a complex financial picture and wanting to have a place where it – having to create my own resources for having that information all in one place. So that's what this does.

So this page goes into detail and has all those steps for how to do that, which I'm going to kind of walk through right now.

So the first tab allows you to put in information for up to six programs and up to six funding sources over on the right here. And so I'm going to kind of walk through and just do a couple of them.

So I pre-populated just the first program. So you can change the program name. You can edit all of the items in here; I have some sample items just to start with for service line item. You can plug in the cost here; I started with just a clean $10,000 for all of them for the purposes of this demo. You're going to want to put in your budget year so you know what you're working with.

And then once you have all – that's all you need to fill in to start off. And you would do that for program two and program three if you were doing multiple programs. But if you're just doing the one to start off, that's all you'd fill out on this side.

Then what you would do over here is you would start filling in your funding sources. So I'm going to say the funding source one is TechHire and, just for the sake of the demo, I'm going to put $100,000. I know most of you probably had more than that. And then funding source two I'm going to put an example in there for $50,000 from a family foundation.

You can actually fill in the start and end dates; I'm going to skip that for now. This is just for informational purposes. It doesn't do anything with that information in the document.

But what you're going to do then is for each of the line items – so for here, I have TechHire, I have staff at $10,000. Because it's not assigned to a funding source yet, it says there's a gap of $10,000. But if I – in this box here where it says "applicable," I can choose yes, no, or unknown. If I choose yes, then it's going to assign $10,000 to the TechHire funding source.

Now, if I assign all of these – I'm going to make this smaller, actually, so you see how this part works. If we only had $50,000 for this funding source and we assigned all of these to that funding source, you'll see once I assign this one, now it's going to notify me that I'm overspent on this one. Because I now have $60,000 assigned to it and I only had $50,000 of TechHire.

So I'm going to have to back out $10,000 there, but that's where it comes in over here, where I – now my family foundation, I haven't spent any money. So if I need this line item, which is "other," covered, I can cover it with my family foundation by putting a yes in this box. And now my family foundation has full applicable funding.

The funding gaps will show up, as you saw before. So applicable funding, funding gap, and funding surplus are automatically generated for you. And that's what the tool does for you. Applicable funding just says how much you have applied to it. Gap is if you don't have any money for that or you have a shortage of the money. So just to show you that, so now there's a gap there because they don't have anything covering rent, utilities.

And surplus is if you had too much assigned to it. So if I had both of these funding sources assigned to that line item, now I have a surplus of $10,000. So what that's to help you with is knowing – as you're going about going for grants and figuring out where your gap is and where your surplus is, have you spent all the money that you have? Do you have money in a different funding source that you could apply to cover rent and utilities for TechHire because you ran out of money in the original grant?

It tallies these all down here at the bottom, by the way. So if you went through and you found out you had not a surplus but you had a major gap here, then you would know what you needed to fundraise for to cover your programs.

So I'll just show you a couple more features of this before we move on. One is you can click this to – you might find yourself filled out all the way down column G here and you want to get rid of it because you want to start over. If you click that, it's going to clear out the column for you. I'll do the same over here.

And I think that's all I'm going to show you for this now.

The second tab – so if you just had one program, you really just wanted to spend this, you just wanted to use multiple funding sources across a number – you only had one program and you had multiple funding sources. You need more line items, basically. Built a tab here to have 30 line items. Actually, I think that tallies up to 25 line items. So you can just have one program and multiple funding sources. And it works exactly the same way as the tab I just showed you.

So I'll go ahead and stop sharing now. I think I – can I do that on my side? Yep. OK.

All right. So yeah, hopefully that tool – which again, there's – if I went through it too quickly or you have too many questions, we can answer some questions now. We'll move into questions in a moment. But there is a whole video where I walk through it in detail that's going to be posted on the WorkforceGPS site along with all the other files here.

So yeah. And I think that brings us to questions. So yeah, and as Christian – you can go ahead and post questions in the main chat. Christian and I are happy to answer questions. I believe Ayreen is still available to answer questions if it's related to the grant or a DOL question. (Pause.)

MR. LAGARDE: Hey, Matt?

MR. POLAND: Yeah.

MR. LAGARDE: I just had a question about the demo that we're posting. Do you want to just let them know sort of what's in the demo? And then if you have any questions after they watch the demo who they should connect with? But yeah, tell them what's in the demo.

MR. POLAND: Yeah. So the demo is just a little bit more detailed version of what I just did for you guys and walking through the Excel template. And we can – I think on the last slide here we have – (inaudible). So if there's questions about – any questions about the guide itself, that could be Christian or I.

If it's about the funding analysis tool, I'm happy to field those questions, or if people come across problems. We did our best to do de-bugging of the tool. It's possible there's a bug or two left in it and we had – I'll give a shout-out to Alison (ph) on the call here, and a few others that helped me test it out. And so I think we caught most of those. But in case we didn't, if you find a bug or you have something – or you'd like it to do something else. We'd love to get feedback too if people would like the tool to do something else and if it's something we may be able to do.

MS. CADWALLADER: Matt, I have a question about the sustainability action plan. Do you have any recommendations as to how grantees should fill out this action plan? Is this a team effort? Is this a strategy planning meeting with our grantees? Can you tell us about – a little bit more about how it could be useful.

MR. POLAND: Yeah, sure. Yeah, I'll start. And then Christian, if you want to jump in too.

I think the template would be a really useful tool for walking – if you've brought together – Christian was talking earlier in the presentation, and you had your internal staff, your external partners come together. Thank you for bringing that up again.

And you went section by section and let the guiding questions guide the conversation, the tool, the guide – which we don't have an – this is kind of the overall frame of it – would be a good place to capture that information and then to develop your plan from there by putting down what it is you're trying to sustain.

And then in the meeting coming up with kind of distinct action steps on who's going to take care of that and when it needs to be done by or what period of time it's going to cover and doing that.

Christian, do you have anything to add to that?

MR. LAGARDE: No, Matt. (Inaudible) – 100 percent agree with Matt. Don't let it be siloed. Don't let it just be one or two people. Go far and wide. Any stakeholder that is going to be part of the potential action steps and the people responsible. For the last four years, depending on how you worked with your partners and your subgrantees, those names may change in the future. Those names that people are responsible may shift and there may be different roles with those other organizations moving forward.

So yeah, just echoing what Matt said about far and wide, as many people at the table as you can have in that conversation. And I think the more people you have, the more serious you are about it.

The level of people that are in that conversation, sure, this may be something you want to run by your vice president or the executive director or what have you. Before you do that, sort of brainstorm how that's going to go. But yeah – (inaudible) – sort of a wholescale, all-hands-on-deck type of meeting and conversation and you can use this plan to drive and cover all the elements of what sustainability could look like in the future.

MS. CADWALLADER: Excellent. There is a question in the chat window on helping grantees tell their stories. What are some of the particular effective strategies that you've seen for telling the story of your projects? Christian or Matt, do you want to take this one on? Any strategies?

MR. LAGARDE: Yeah, I'll go first and then hand it over to Matt. I'll say this. There is – this is me speaking personally and then professionally.

There is nothing more compelling than a successful student story. There's nothing more compelling than a successful story of someone who went through the program, received all the services, received the education, and then went on to succeed. That is what I've seen some effective strategies is to do that. And that could be in a video. That could be in a podcast. That could be in a case study.

So you have written, video, audio, you name it. Pick the medium that you're comfortable with. Pick the medium that you can afford. And broadcast those stories far and wide. So it could be a student story.

It could be an employer telling the benefit of the success that you had with this partnership, with TechHire. And same thing. Pick a medium and – but find those wins. Find those pieces and use that and then share it far and wide.

Social media, the radio – (inaudible) – but yeah, any way you can get it out in the ears of people once you pull (down ?) those things have been really effective and that really (singes ?) that story and really helps the – (inaudible).

MR. POLAND: I'll just add, to sort of piggyback on what Christian said about stories. I heard a really great quote once. And I can't remember where I heard it. And it's a little more directly related to fundraising. But what they said was, data opens eyes but stories open wallets. That you can get someone's attention with the data, maybe; but to really drive it home you need the story.

And so we're talking about a number of things besides funding; we're talking about partners and things like that. But being good at telling your story is important. And it's not always natural, I guess, to tell the story. And that's why we provided some resources of how to kind of build a story about what your program does and what your – or what your partnership does to serve the world.

And you're probably going to go through iterations and getting feedback. Like, which stories are effective or not? Or what parts of your story are more effective than others? And honing that story all the time, right? I don't think it's a one-and-done, writing down the story and trying to repeat it as many times as possible. You're going to probably be constantly adjusting it.

MR. LAGARDE: Yep.

MS. CADWALLADER: Excellent. Well, we certainly are coming to the very top of our presentation today. If there aren't any further questions in the chat window, it could certainly transition.

Here's our contact information where you can find – get in touch with Christian and Matt on anything technical assistance related to our TechHire grant. And as always, you can reach me, Danielle, and Robin in the TechHire.gov mailbox.

Certainly want to thank all of you for being available today on the sustainability planning webinar. Like I mentioned earlier, this is one of the very last technical assistance opportunities that will get all of the 39 TechHire grantees together. So for those of you who will be completing at the end of this month, definitely wanted to thank you for your hard work and the work that you've done with your TechHire grant program.

And for those of that are continuing on, we really do hope we'll have more opportunities with our colleagues at Jobs For the Future and Maher & Maher and ICF to provide more technical assistance. Really want to be able to celebrate your successes, celebrate the work that you've done through the TechHire partnership grants. So I'm sure we'll have another opportunity to come together and have that type of celebration and really help you to tell your story.

Definitely thank you so much for being available this afternoon. And have a wonderful day. Thanks so much. Bye-bye.

(END)