**WorkforceGPS**

**Transcript of Webinar**

**Sustainability Strategies: Leaving a Scaling Apprenticeship Program Legacy**

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LAURA CASERTANO: But with that, I am going to get myself right out of the way. I want to welcome everyone to today's "Sustainability Strategies: Leaving a Scaling Apprenticeship Program Legacy." And I'm going to turn things over to your moderator today, Zodie Makonnen. She's a grant lead for a scaling apprenticeship through sector-based strategies with the Division of Strategic Investments, Employment and Training Administration. Zodie, take it away.

ZODIE MAKONNEN: Thank you so much, Laura. And good afternoon, everyone. Happy New Year. I hope the new year has started great for all of you. As Laura mentioned, my name is Zodie Makonnen, and I am the grant lead for the scaling apprenticeship grant program. We're very excited to bring you the first of many technical assistance installments about scaling apprenticeship program sustainability. We know this has been on the minds and agendas of many of you, and some of you are further along in these conversations and strategies than others.

What we hope to accomplish with this webinar is to help set the stage, to establish what we mean by sustainability from the SA perspective and give you all some ideas about how to prepare for, strategize and execute a sustainability plan. We're a great panel for you today. Let me introduce our panelists. We have with us today Jan Bray and Mary Roberto, who are both technical assistance coaches with Manhattan Strategy Group. We're very excited to have both of them with us today.

Before we get started, I wanted to very briefly go over the objectives of today's session. So our objectives are to develop a baseline understanding of how to prepare for sustainability during acts of implementation, identify sustainability drivers that should be assessed and considered as programs and services adapt to changing needs, understand how the six SA grant indicators can inform sustainability planning in your individual SA grant program, and finally become familiar with the new SA sustainability assessment tool that has been developed and go over the proposed technical assistance activities that are upcoming.

Before I turn it over to Jan and Mary, we wanted to pose a few questions and if you could type your responses in the chat, that would be great. So the first question is what aspect of the SA grant do you most want to sustain after the grant ends? And the second one is what is your biggest challenge in making that happen. If you could type your responses in the chat we can take a look at it, and we'll continue to take a look at it during this session.

Jan, I'm going to turn it over to you to go over some of the responses that are going to come up in the chat.

JANET BRAY: Thank you, Zodie. I appreciate it. To me, the whole issue of sustainability is so important. I know for everybody on this call and that's been involved in this scaling apprenticeship grant, how much time and effort and thought has been put into making a success of this, even during an unusual time where there have been challenges, problems. Some of you are still facing and addressing some of those challenges. You put in the time to do it and at the end of the day when the grant is over, you want to take advantage and build on what you've learned and what you've been doing.

So this is, as Zodie said, the first of several webinars we're going to be able to do to really help you figure out how do you sustain all that time and effort and innovation from many of you that you've put together? So that's why we appreciate your input on some of the what you want to sustain, and what are some of your biggest challenges. Certainly, as I'm taking a real quick look at the chatroom, some of the support efforts you've done for training, relationships – that's always one of the biggest things – and funding. I get that. That's a large one.

Your answers in that chat box is going to help all of us figure out what are the best ways to address this issue that meet your needs. This is also helpful for the coaches to really figure out where to we pinpoint and what do we do to help you as you're trying to put this through. So please continue to answer those and throughout the chat room.

I also want to say that the chat room is there for you to ask us any questions. Take advantage of what – our experiences, what we've learned and as well as your colleagues. There are other grantees on here who have done some very good work and some interesting things, so let's take advantage of what they've learned during this webinar.

So let's start off and – so here's what we're going to really do today. So you know, why are we here? The whole conundrum of sustainability, how do you define sustainable for the SA team? Introduce – which is so exciting. This is the first time I've seen this. Sustainability assessment tools and how to create an action strategies to move forward. So that's sort of what we're going to be looking at as we move forward with this. Again, feel free to use the chat room if you want to add to the discussion or if you have any questions that we can answer – Mary and I can answer. That's what we're here for.

So we're here to talk about sustainability. And the question is why are we talking about sustainability? Well, as I said, we use – number one and this is very blunt, but you've spent a lot of time and effort on this. Make sure all that you've done is continued. Build on that time and effort so that you don't lose it to retain the work and the efforts of all your work that you've done. And as you created new relationships, how do you expand on them? How do you keep moving? But the first and foremost is to develop and focus on the sustainability mission.

I wanted to share with you – and this was not in this grant. They were from other grants, but two grants that I worked on. One of them is the workforce board at the New River Mountain Lodge in Virginia. They actually wrote into – they thought of it beforehand. And so, they wrote in two things into their grant proposal, which was accepted. One was the hiring of the consultant to bring all of the currently identified partners together to do strategic planning. How do we work together? And they also brought in this case counsel to look at how do they get credit for prior learning experiences all together so that the community colleges could expertly and appropriately engage in this.

And when they finished that, all the colleges accepted that, so everybody was on the same starting page and that has continued to other grants that they're doing. So it's this sustainability mindset that they talked about beforehand and that was really good.

There's also another grant where – this was a case in Idaho. They looked at all the multiple grants around apprenticeship in their state and they brought together. They again wrote this into their grant proposal and did strategic planning with all of the other grantee recipients. How do we work together? How do we make sure that we are not inundating employers with different messages? How do we tell them what each was doing and collect data so that we have a general picture? And Idaho is a smaller state. It's a little easier to do. But it's the sustainability mindset that they thought about beforehand, and so that's really one of the things that we want you to think about as you go forward.

I know that she might not be happy with me saying this, but one of our grantees in Colorado, Department of Higher Education, Renee [ph], is on the phone. They have yet struggled with a lot of things, turnover, etc. but they're now pulling together all of the other grantees in the collegiate system in Colorado to say how do we work together and help our grant and help their grant and begin to build on what we need in Colorado moving forward.

So there are ways to think about this that we want you to begin to think differently. So that's the conundrum that we talk about a lot. You know, it's just not natural. You've got a grant and you think about I just need to meet these numbers. I need to move forward here with the work plan I've put together. So, and sustainability is thinking about the larger practice that's out there.

And so, part of this is really thinking about what's your leadership thinking about? What are they – the leadership of the college, the leadership of the workforce boards and the employers – what is it that they are thinking about beyond the life of the grant? And so, how do we pull together and come together with one mission statement, one vision statement of what we are trying to do?

And then how do we make sure that we have strategies in place? Some of it is communication but what are your funding streams, which are very important. How do you leverage what is out there, whether it's community-based organizations, funding from WIOA and their employer resources? How do you leverage their resources as well and how do you then imbed all this thought process and this thinking into other programs that you're working on?

Sustainability isn't just about this grant. Sustainability is taking all of those practices and those tools that you created as a part of what you're working on now with this grant and utilizing them to build the commons up to meet the labor market needs, both individual, employer, and community, to build upon this moving forward. Sustainability is an intentional act. It is thinking about it and it is looking at how do we build upon it? How do we look to the future? It is not just about today and about one single grant. It's about looking at a broader picture of all of that.

So we've had webinars back in December actually about this, the six success indicators for this grant. And think about – as you're thinking about sustainability, look at those success factors that are there. That's strong organizational management. Your personnel, your resources, your communication. What of those that are in place as a result of this grant do you want to continue? You want to keep it in place because it will move you forward, whether it's another grant or just meeting, as we said, local needs for workforce and personal individuals who are trying to get into the workforce.

Your strong operational system, data driven decision making, program evaluation, continuous improvement, data collection tools. What have you developed as part of this grant that are equally relevant and important to other activities, other initiatives that you're going to do? To me, one of the worst things you can do is you purchase a data collection tool, and the grant is over and you get rid of the tool. What have you gained by doing that? So looking at all of your operational systems, your sustainability principles, what developments can be adapted internally or externally as you want to leave a legacy around the sustaining apprenticeship grant?

Effective apprenticeship design. Can these apprenticeships be continued after the life of the grant, and hopefully it can be? If not, how do you redesign them? Just don't throw it away. You've created relationships around this apprenticeship design. How do you build upon it? How do you continue to use it? The same thing with your partnership engagements. What partnerships should be continued, expanded, or is there some that you want to reconsider? Very, very important because that's going to continue. All of these are non-independent. They integrate and align with each other.

And then finally, the participant engagement in the experience. What positive experience for apprentices can be continued or magnified? Have you done anything with the apprentices? Put together some kind of communication system, an online connection system with them that can be continued. How do you utilize those that have completed the apprenticeship program to help recruit and engage and retain other apprentices? So that is really important as you go through this.

So as you're thinking about, questioning, just think about these activities, policies, procedures, ideas that – we've listed some of them to think about as you're looking at sustainability and as well as after the grant. Has your grant landscape and program been assessed for sustainability? Think back to the six success factors and the things that did work but think about those other factors. Are those adding to sustainability? Have you addressed them enough to be sustainable? What does your data show? Does your data give you a guide as to what should be sustained or something that needs to be changed or re-evaluated?

And I've seen this in the chat box. What's needed to maintain the program? What resources are available? I understand funding is always an issue. Grants are not the only funding out there, so looking around. What kind of funding? Working with your workforce board, looking at your community-based organizations. They have also access to funding. Things that employers might be willing to support. What kind of funding, what kind of resources? And resources are not just funding. They're also people and they're also time. So what kind of resources do you need to keep this initiative that you've started moving forward.

The same thing can be said with your partnerships. Have they worked? Have they not? Are there others that you haven't thought about or you're just learning? How do you make sure that those that you've established are continued, and how do you then continue to build on those that are just beginning or you've just identified?

And finally, what practices and lessons have you learned? It's good to have a candid conversation with your team to say what have we learned from this? What worked and what didn't, and how do we continue building on what worked and revising what did not and what needs to change? So those are all activities that you really want to think about. And so, as we said, you can download this PowerPoint because you can utilize some of those questions, and we strongly encourage you to get with your team and to look at all of these questions.

Sustainability is not a one action effort. It goes over time and it builds, but you need to start somewhere. Think about the vision that you have, both within your team as well as above as well as outside of you. What's the vision? What are the systems that you have, the operational systems and what needs to be retained? Your relationships that are there and how do you build upon them, and how do you continue to evaluate what's working and what's not?

And with that as an overview, Mary, I'm going to turn it over to you to continue with the sustainability tool.

MARY ROBERTO: Thank you, Jan. Appreciate it. Hi, everyone. Well, if you're like me you're thinking well, sustainability conversations are all good and fine. So what steps do I actually take to realize this process? And I'm always about tools that help me get there. So we brought you some tools and those are again in the file share area down at the bottom. There is a sustainability self-assessment tool and then there is a tool to identify stakeholders.

So we created – and I think from the point where you're planning the grant to the grant end and the possibility of losing funding or not having some support funding in place, those steps around sustainability are a little bit elusive. And thinking about sustainability during acts of implementation of a grant is somewhat difficult.

So again, we created a couple of tools that can be used as a guide to help your team through this process. And don't worry if you already are into that process. The tools are still usable and if you'd like, your coach can meet with you and really guide and facilitate the process. I think sometimes when you have a person from the outside coming in kind of looking at the picture with you and maybe digging in a little bit, that might make it a little bit easier to do.

So when thinking about a process, the first step is to actually take a step back and look at the current sustainability discussions if you're having those and assess if you have all the right people at the table. If you haven't started the discussions, the tool actually can be a good jumping off point. The tool about identification of stakeholders helps you think through if you do have actually the right people, the influencers. So we think about social media. Who influences where? Social media is broad in that communication. There are influencers who are out there and champions that you may or may not have thought of.

So the tool that we've designed really starts with an exercise in identification of the stakeholders and reviewing a video of stakeholder mapping. I'm sorry. Let me move this back. A video around stakeholder mapping that you'll see the link to in that stakeholder tool. And it really gives some ideas around who should be at the table and how to really map that out. So, and it really helps you think deeply about who in your community has already been involved, and those are certainly our partners, employers, possibly apprentices that have been involved in the process that you can continue to have involved, and possibly those that you may not have had involved at all and you may need to bring into the conversation and educate. So people like the governor's office or the Department of Higher Education, workforce boards, others that are more at a leadership level or influencer level, legislative level that may not have been involved in the conversation but definitely have influence and they have an interest in the topic.

So there's a video. There is the link to that video inside the tool. We'd like you to take a look at that if you'd like and see what you can gain from it. And then there's really three steps, identification of the stakeholders, analysis of those stakeholders, and then mapping them. Who's essential to the conversation, who's important and who is just interesting? And I don't say just interesting to minimize it, but interesting in the sense that hey, we might not have thought about this person to be involved. And I think I see a news feed from a representative in my – in the community that I work in and I know that they've been posting about economic development and job creation and retaining employees and apprenticeships, so maybe I should invite that person along.

And then, you know, so there's that identification, that stakeholder analysis phase. And in that phase the leaders go through the list and really develop a deeper understanding of the stakeholder perspectives, and this really takes some diving in to possibly LinkedIn profiles to communications, again, that these stakeholders are sending out that, or maybe you just know of. So again, for example, you may have a former apprentice who's very happy with their current work situation, who's happy with the process that can provide a lived experience perspective for your sustainability efforts and really champion that along. It could include employers who could champion and, again, legislators, other influencers. And then the mapping really is about who you then are going to invite. How do you market that and get people around the table?

The other important piece of this is bringing those that are cognitively diverse to the table, so you want those that you know can paint a picture like, you know, I can think strategically about what we want to do in the future, and I understand the labor market needs and so forth. And then I also have those at the table that are actually really detail-oriented and know how to manage projects and bring us to a place where we can really identify what elements of the project that we want to keep and what might not be in that realm, or the feasibility is just too costly to keep in the future.

So there is that, and then the other tool is a self-assessment. And this self-assessment was created around the five, the actually six really success indicators. And so, there's five sustainability drivers, like topic areas, and then those are directly connected to the success indicators that Jan talked about earlier. So when we're looking at the topic areas – and I'll just move to the next slide with the assessment sample here. So for example, the first statement is really around creating an inclusive and diverse partnerships that will lead to successful organizational structure for the practice now and in the future. So gaining input from stakeholder strengths and the community.

The first piece of that assessment is about the project partners. Have you assessed, you know, have you done the first part with the first tool – is really about assessing the stakeholders and where you're at with that? So the rankings are no, I haven't really done that at all. Number two is yeah, we're planning to do that. Number three is we're making some progress, so you've actually not just planned but you've implemented a plan to engage stakeholders and really evaluate who those are. Number four, you've done some of it already. You've invited them. They've been included. And then number five is the star. The star is yes, it's in place and we're moving ahead and we've already done that. We've assessed all of it and we brought out stakeholders along.

And as you can see in that stakeholder partnership engagement piece of the tool, the success indicators five and six are included, so those are highlighted. And if you remember, the success indicators for that is effective partner engagement. That is number four, and number five – I'm sorry. Number six. Five and six. Six is effective participant engagement in the apprenticeship experience, so that's where those success indicators really play in.

So that's just kind of a preview if you haven't downloaded and taken a look at that of the self-assessment. And so, like anything, it's a tool, right? So it can be used in whatever way makes sense for you and really whatever way you all decide with your TA coach can facilitate a process with you. Some of that might look like coordinating with them, kind of understanding the tool a little better and how it can be utilized, convening a program team, so an initial team to either go through the stakeholder engagement tool and really facilitate that process with you, review the assessment toolkit, the self-assessment with your team and go through it. And so, those are some of the strategies and the options.

So I'm not sure if you all are familiar with some of the ways in which this can be done and our creative ways around design thinking. So we use facilitation processes where – one is called the world café where you get people around the table and you really talk about aspirational questions, like if any of you have read A Beautiful Question, that's a really good book about not starting off with the program. Like we don't have – we don't think we can sustain these things but really asking the question about, you know, for example Bourbon [ph] is one of the success coaches in play and it's been beneficial. And the question might be how do we sustain those efforts? Or broader questions.

So we look at aspirational questions in that process, as well as another facilitation method is strategic doing. Some of us are skilled in that, where we bring groups together and we don't just talk about a sustainability plan. We talk about actually how to implement the plan and do. So strategic doing is really about a step-by-step process to get you where you need to go, based, again, in more positive thinking about what you've been doing and how to sustain those efforts. So those are some options and opportunities ahead as you think through what your next steps are.

And we wanted to move to a poll question and really talk about what's most important for you when you're thinking about sustainability planning. So take a minute and let you go through and answer those and we'll use those as a jump off point to the conversation that Jan and I want to have with you next, and really have a conversation and answer some questions.

MS. BRAY: So I find it interesting. Not surprising, but interesting that funding always rises to the top and with that. And not to undermine that because absolutely – or minimize that rather. I think funding is a major issue. There is no doubt about that. But at the end of the day, it's – is all that you've done important? Have you created those relationships? And if so, how do you continue them on? Funding comes in as part of that.

Many of our TA coaches and many of you as colleges are working on multiple grants and, you know, funding comes in all different ways and different partners that are there. But really, as we said early on, I may suggest that we could – I agree with first of all what aspects should be sustained? You're absolutely right. That's a key question that you need to add because where are you going to put your time and effort that's there. And I really suggest, as we talked about, leadership having a vision.

There needs to be some kind of convening that's not just you or the colleges or your team. It is also about the leadership of the colleges. It is about the employers that you built relationships with. It is about all of your stakeholders that you've had as part of the grant. Many of you have multiple colleges who are partners in this grant to really convene and talk about what's important and how do we reach that? What have we learned from this grant? What can we continue on? You know, there are thirty probably – correct me but there is something like 800,000 apprenticeships that are in existence out there. Funding is coming from somewhere for that and they all have RTI. They all need training. So the question is have you put into place the processes and the system?

It helps you connect to those as well. It helps you know employers and what they're looking for so that you are there to support them and the funding comes from them, not necessarily from governmental grants. So there are multiple ways and it's thinking differently, but it first is – Mary said that world café is a great strategy to use if you're trying to work this out. But what is it, before you talk about funds and the costs? What is it that you want to sustain? What worked in this grant and what didn't? What did you build and, you know, so that you want to continue going?

And I think that's really critical. I know you all haven't had time to look at the assessment tool that is out there, but what we'd like to ask if you could put into the chat box have you given any thought to how you might move forward with sustainability? What can you do that you can share with your fellow grantees that are on this? You know, some of what – excuse me – we've learned from these affinity group calls where we brought in employers and other grantees to really talk about what they're doing. Has any of that impacted and made you change how you were doing something and move forward with that?

And so, I'm sorry we don't have a question on this, but I'd like to know if some of you – just a simple yes or no if you could all type in there. Do you plan to take some time to think about sustainability from this point forward? You know, and if you've already done it, just put in a yes. That's okay, but all right. Let's just see those yesses.

The sustainability tool is one of the first that I know I've seen that I think you're going to find very, very useful. You don't have to follow it exactly, but build and take advantage of what you've done and make a difference. And actually, it elevates your position in the community as to the importance of getting people in the right seats and the right time and really building economic growth in your community. That's a leadership role you can play. And so, the question is do you view this as a leadership? And so, I think that's really important.

So all right. So we looked back at the poll. And it was staying pretty close between determining what aspects of the SA program should be sustained, and then of course as we said, understanding how to access funding. Critical? Yes. I agree. But until you answer the first one and until you look at sustainability from a broader level, answering and addressing that question isn't going to help you. You have to answer the larger picture first, look at what worked and what didn't work, how do you build it, how do you sustain it. Then that's where the issue of funding comes in. That's really important.

And if you have a lot of stakeholder and partnership support, funding gets a little easier because they're bringing their thinking and their resources. And I'm not saying they're necessarily going to fund it, but they will think about where else can we get funding, because it is equally important to them.

So Mary, anything else you can add as we're waiting for any other questions from people?

MS. ROBERTO: I guess the only other piece of information is really about the importance that everybody probably already understands, of the diversity of thought around this. I think sometimes we all get in our silos, and we're used to working with the same people every day or the project director, coordinators, accounting, finance, contracts, but how important it is to bring in others to that diversity of thought because you may not have thought about some of the things that people from the outside looking in can think about or will think about from their perspective.

So if you're stuck somewhere and you're like I don't really, I don't know the next steps and this isn't concrete enough. It's too ambiguous. And I really don't understand how that data system I built is going to work with anything else that we do so I don't know what – how I can sustain that. You know, using partners to help you co-create your next steps is really where it's at.

MS. BRAY: Yeah. And you know, we do have grantees on this grant now that are working with industry trade associations. They have a need. They have to meet the needs of their members, so their employers, so how are you going to incorporate and bring them into this? How can they support, because it isn't just about the industry you're working with now that's one of the many most of you are working with, with more than one industry, but what of their industry should you expand? Do you have a process in place that you can now turn to other industries within your community, your state, that you can take this process and replicate it? Enhance it, improve upon it, but replicate it and I think that's really important.

So you have your coaches who understand sustainability and are here to work with you on that. We strongly encourage you to really think about, again, your stakeholders and your teams. For those of you that have had site visits, a lot of this has come out of those site visits. I've had the pleasure of participating in some of them and, you know, all of a sudden you have some stakeholders that go oh, I didn't realize that. And oh, this is really helpful. Oh, we can use this. How do I get more involved? So you need to bring them all together.

What is the issue you're trying to solve? Trying to get people into well-paying jobs that meet the labor market needs within your community. Quite frankly, at the end of the day that's what it is. So how do you do it? What systems do you have in place? Communication is very, very important. Communication within the college, communication to your employers, communication to partner colleges, communication to your apprentices. Very important, especially as you're dealing with younger ones as they can talk to one another. We find that very effective. It retains them, equally so.

And then, if they are not at the end of the apprenticeship program, if the apprentice is not being hired on by the employer, why not? Talk to the employer. What could have been done differently? Sometimes it's nothing. It's just a mismatch. We get that. But is there anything else you could have done that would have made a difference in the retention area? That's a learning process, and sustainability doesn't mean you've got the answers to everything. It is continuing the learning process and making sure that it feeds into the vision that you have, feeds into the processes or expands and improves upon the process and keeps all of your stakeholders engaged. That's sustainability.

This grant gave you an excellent start on building that together and we just want to make sure that it continues so that your time and effort, and yes, the funding you've got works well. And I know many of the grantees that are part of these apprenticeship grant are doing that and are beginning to think about sustainability. So hopefully, this tool is going to help guide and set some parameters around for you to help shape your thinking and that's what it's meant to be. It is not a beginning and end-all. It is really designed to help you know the questions to ask and how to ask them, how to evaluate them, and to begin building a sustainability plan that will continue on to another grant or another effort. That's what's really important about it.

So we don't see many questions in there. Mary, anything else you want to add to this discussion? Is there anything in the toolbox, the toolkit that – I know we thought we wouldn't have time to get – that you would specifically say they should take a look at?

MS. ROBERTO: I would say that if – depending on where they're at in the process of thinking about or actually executing a sustainability plan is really going back and taking a look at the stakeholders, about who they have involved and if they are cognitively diverse, if they have individuals that they could do a little bit more exploration of who in the community, who in the potential partners can champion their efforts to different places and help them think about it maybe a little bit differently, or maybe the same. But make sure that they're on the right track. I really can't say enough about bringing in people that do things differently than maybe you're thinking.

And I put in the chat a book that I just love called "Questions Are The Answer." And bringing people around the table and around intriguing questions, aspirational questions that are not built in negativity but built in aspirational kind of thinking, that might be helpful too. And really digging into this with the TA coaches. We can definitely help in this realm and help you along.

MS. BRAY: All right. If there are no questions, and I know sustainability can be a tough issue to deal with, we are asking all the coaches who are going to be addressing this with you and talking about sustainability because it is important. We want to make sure that you do continue on what you have learned and with all the hard work and the excellent work you have all done, we want to see continue on.

And I'm not speaking for the DOL, but I will say this anyway. I think that the DOL part of the reason they give the funding is to learn from it. They want to learn as well what works and what doesn't, and they want to put funding into things that are going to stay beyond. So sustainability is very important to the Department of Labor as well.

So if there are no questions, we're going to give you back about 12 minutes of your day so hopefully that works for everyone. If you have a few minutes, when this ends, we hope that you'll remain on the phone line for a quick debrief with the questionnaire. We always like to know if these are helpful and what else you would need.

So Zodie, I'm going to turn it back over to you if you want to close this out.

MS. MAKONNEN: Thank you so much, Jan and Mary for this. I hope everyone found the information useful and that the tools that have been put in the file share pod is something that you will take a look at and work with the coaches to move you forward on this sustainability journey. So thank you so much. Have a great rest of the day, and I'm going to turn it over to Laura to close us out.

(END)