**Workforce 3One**

**Transcript of Webinar**

**YouthBuild Webinar Series**

**Meet the Workforce Innovation Fund Round Two Grantees:**

**Grant Project Presentations**

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BRIAN KEATING: I'm your technical facilitator here, if you need anything, technically speaking. Hopefully you won't. I'm going to go ahead and get myself right out of the way. I do want to mention that you've got a chat window there on your screen.

Feel free to go ahead and type in who you are to introduce yourself as we get underway here today. So go ahead and let us know your name, name of your organization, where you are physically located in the country, and how many, if any, are joining you today, if you happen to be in a group.

And then I do believe we're going to hold questions until the end today, but you're welcome to type in any questions or comments you might have and then – into that chat window at any time, and I believe we even may take questions or comments over the phone today. So just wanted to let you know about that. I'm going to go ahead and move us into our main content today.

So welcome, everyone, to the "Meet The Grantees Round Two Grant Project Overviews" webinar, and to kick things off I'm going to turn things over to our moderator, Linda Lawson, from Maher & Maher. Linda, take it away.

LINDA LAWSON: Great. Thank you, Brian. Welcome, everyone, to this first in the series of three presentations designed to help us all understand and learn about the round two Workforce Innovation Fund grant projects. We're glad you joined us today. We have a dual purpose today in presenting this information.

One is to provide those of you on the line with a great robust presentation and a chance for some questions and answers at the end and also to package up these videos of each of the grant project presentations and place those on the Workforce Innovation Fund website that will be launched as part of the Workforce GPS website that will be happening sometime in March.

So we will be moving through each of our presentations today from our grant projects, Incite, Inc. and W.E. Upjohn Institute for Employment Research and CareerSource Florida Department of Economic Opportunity, and Virginia Community College System.

At the end we will – throughout the presentations we will hold questions, and then we will open up the line at the end and hope to hear your questions about each of the grant projects or a general question to all of the grant staff, if you so desire. So we will take about between seven and nine minutes per presentation, and each of the grantees has developed a slide to talk about their project. So please hang on as we move through these and transition between grantees, and we'll get started.

But before I do that, just a note on the Workforce Innovation Fund round two grant projects. These were awarded back by the Employment and Training Administration at the U.S. Department of Labor back in September of 2014. The amount of grant funding for each project ranged between just under $3 million to over $11 million and with a total of over $50 – I think $50.7 million in grants to 11 grantees.

And the idea and the intention of the Workforce Innovation Fund is to improve federal job training programs, and those can span across service delivery, system improvements, improving cooperation between federal and state and local partners, and leveraging funding streams, expanding partnerships with employers and industry sectors and with the overall goal to really improve the ability of the workforce system to provide for future skill needs for employers.

So with that – that's an overview of the project, and let's go ahead and get started. So first up we have Jennifer Johnson from Incite, and, Jennifer, I'm going to let you introduce yourself and take it away.

JENNIFER JOHNSON: Great. Thanks, everybody. Thanks for participating on the webinar and hosting us. My name is Jennifer Johnson. I'm the project manager for Incite, Incorporated. With me I also have Susan Barksdale, our cognitive behavioral specialist who works on this grant with us. So she'll be chiming in as well when it's appropriate.

So I wanted to introduce Rethinking Job Search, our project that is funded with the Workforce Innovation Fund, and so that's what we'll be talking about today. A little bit of background, Incite, Incorporated is a local workforce board for Linn, Marion, Polk, and Yamhill Counties in Oregon, which is a regional area of four counties. Our funding level is $3 million with – which is a type A project type, and our evaluation firm working with us is Public Policy Associates out of Lansing, Michigan.

I wanted to provide a little bit of background. So one of the problems we identified earlier on is that unemployment can be a very challenging time emotionally, and our workforce centers throughout the state are very good at providing technical skills, things around resume writing and interview skills and enhancing those kinds of skills but really lacked systematically at providing some of the soft skills and emotional support.

So we wanted to address this, and in doing some research we found that there are some supports that are provided in the centers – in similar centers in the U.K., Australia, and Canada. So we connected with some of the partners out there and understood a little bit better what the model is that they're using to incorporate mental health support into their job search systems and found out that they're getting great success out of this. And so that's kind of the basis around which we decided to design this program.

So Rethinking Job Search was developed using the Workforce Innovation Fund grant, and it is implemented in 10 workforce centers which are American Job Centers across the state of Oregon. It's a four-week series of facilitated small group discussions using cognitive behavioral techniques to address social and emotional consequences of unemployment.

We do this using cognitive behavioral techniques developed through a curriculum that was designed by Susan Barksdale who's here, and you're able to ask your questions later, if you have questions around that. And we are educating people on how to think through job search in a way that is productive for them by increasing confidence, motivation, and accountability.

When someone is going through a hard time in life, we want to be able to give them the best tools they can use when they are presenting themselves to a future employer, and we believe that this will be a way that we can help them get jobs faster. So they address – the workshops address the social and emotional consequence of unemployment in order to help rebuild their confidence, motivation, and accountability.

So the target population for Rethinking Job Search is those collecting Oregon unemployment insurance and those who are at least 18 years of age and who have a high school diploma and GED. So that's the requirements for eligibility in the program.

Our recruitment strategy is twofold. First, we are connecting with staff and providing them with the materials in order to act as a referral system in the workforce centers in the state and other workforce centers across the state. And we are also partnered closely with unemployment insurance, and with them we are sending out e-mails to those who are collecting unemployment insurance and informing them of this opportunity. Additionally, unemployment insurance has worked with us to be able to provide job search activity credits towards their UI claim each week using our program.

So prior to our decision, job seekers will complete an assessment of eligibility and job search readiness according to the stages of change model created by Ezra House and Ezra House is a partner that we have out of Australia who has been doing this work for a while. And so we borrowed their model to do this with their permission, and we're partnering with them on this piece. At the end of this project we'll be able to measure the degree to which job search readiness is correlated with outcomes, and so that's one of the main things we'll be looking at.

The facilitators of the workshops completed a 40-hour cognitive behavioral training – facilitator training along with a 20-hour CBT facilitator certification course online. The facilitator training materials were created by Susan Barksdale, and she's here as well.

As far as system alignment, this is a large piece that we're focusing on and concentrating on for developing this in order to bring partners together that haven't necessarily worked very closely in the past in order to help our job seekers.

So some of the partners are the workforce boards across the state, the workforce centers across the state, the Oregon Employment Division through – and we are partnering through data sharing, unemployment insurance incentives, and co-promoting. So the partnerships are the local workforce boards, the Oregon Employment Department, including Unemployment Insurance Division and the Workforce Operations Division, and workforce center staff.

The Oregon Employment Department and workforce boards have been working together in the past to try to make it a more seamless experience for job seekers as they move through unemployment experience. And this is just one more example of how we can pull those partnerships together and make it a more seamless experience. Rethinking Job Search is an innovative program through which these partners can better come together around the jobs seeker's experience.

At the end of our project we anticipate having 1,000 job seekers that have participated in the Rethinking Job Search workshops. So those are the ones who will be the treatment group compared to a comparison group, which we anticipate having about 2500 job seekers in the comparison group. The comparison group will be made up of those who qualify for the program but did not participate in the workshops but did take that job search readiness assessment that I talked about a few slides ago.

The outcomes that we expect are looking for our 25 percent higher rates of employment three months after completing Rethinking Job Search compared to the comparison group. Participants will have collected unemployment insurance benefits for two weeks less time than the comparison group, 20 percent fewer individuals in long-term employment than compared to the comparison group, and a 15 percent higher job retention rate. And we'll be measuring for all of those in our evaluation.

One of the pieces of the innovation around the partnership is the way that we are bringing partners together in partner communication. We want to be able to provide a common place for communication, resources, success stories, transparency, and for all workforce partners to contribute to the implementation and understanding and best practice building of Rethinking Job Search.

One of the successes is the beginning of the workshops, which just started this past month in January. The first four workshops started with 29 participants. So each of the starting workshops – so four of 10 centers started. Each of those centers met at least their minimum number of participants required to begin, and we have had great feedback so far from both participants and from facilitators on how they're interacting in the workshops and their perspective of it.

We've created a website at www.rethinkingjobsearch.org that not only informs the public about Rethinking Job Search but allows workforce partners to come together in that common space to share resources, communicate, and ask questions about implementation using a form style.

And we invite workforce partners to participate in that, and so we invite you to check that out as well. This allows us to implement using transparency and inclusion of all workforce partners and reduces the likelihood of using a hierarchy of information sharing. So we're trying to do away with that and make it a very common place that everyone participates and understands how it works.

So the challenges we've experienced, we've had some registration frustration as we've learned a new website, and that's been minimized with a great relationship that we have with our web developer but that we've still had to learn as we go. And so there's been a little bit of frustration on the participants and the facilitators, and so we're learning very quickly on how to minimize that.

And so thank you for your attention. If you have any questions, we'll be around at the end. Thank you very much.

MS. LAWSON: Great. Thank you, Jennifer. That was terrific and such an interesting project, testing something that has never been tried really on any sort of scale in America. So it will be really interesting to see what the outcomes are from your project, and it's an exciting one.

Let's move now to Scott Cubberly. He's from W.E. Upjohn Institute for Employment Research, and this is the Southwest Michigan Employer Resource Network Expanded or SWMERN-E Project. So Scott, I'll turn it over to you, and if you would go ahead and introduce yourself to start the video, that would be great.

SCOTT CUBBERLY: Sure. Thank you, Linda. And again, my name is Scott Cubberly. I'm with the W.E. Upjohn Institute for Employment Research, and I'm the project manager on the Southwest Michigan Employer Resource Network Expanded or otherwise known as SWMERN-E. Just like to thank the Department of Labor for providing us with this grant opportunity to do the work that we're looking at bringing to our four counties here in Michigan. And thank you to Maher & Maher for pulling this opportunity together for us as well.

So we've got a project team that consists of myself, our compliance monitor, our procurement manager, and then we have James Vander Hulst who is our ERN facilitator with West Michigan team. And he's been facilitating the Employer Resource Networks around our state for several years now and additionally has Employer Resource Networks in several other states. So we were funded as a $3 million level. We have a impact analysis project and our evaluation firm is Social Policy Research Associates and they've done a great job in working with us and preparing our evaluation.

So when we look at kind of our innovative idea and we think about how we can assist our employers in our area with retaining their current incumbent workers and providing them with a more higher skilled and more successful workforce through soft skills and technical skills training by really addressing barrier removal on the work site as well as, if possible, doing that before they get to the employer as well.

And Michigan has bounced back in the economy a little bit better than other areas in the country from the recession, and at the time that we wrote this grant, employers were still struggling to find people. But now after being awarded, we're looking at unemployment rates less than 5 percent in a four-county area, and we have two of our four counties that are actually less than 4 percent unemployment.

So when we're really talking about this shallow talent pool, the people that we're left engaging and trying to help our employers hire is very needy and has a large number of barriers that they're coming to the table with. And so how we can really embrace that workforce and assist them in really getting our companies participating, they value as a culture kind of taking care of their employees, most of them. And now, we're really trying to interface and do a great job of weaving in our workforce system into and providing them the assets that they need to be successful.

So the Southwest Michigan Employer Resource Network is a public-private partnership which is designed to support employers facing a myriad of retention issues. The SWMERN places success coaches on site with member companies to work with employees facing barriers associated with long-term unemployment or situational poverty. So our success coaches are either Department of Health and Human Services case managers or path case managers that are part of our workforce investment system.

And they go on site and they have worked with entry-level assembly individuals or even up to individuals in the accounting department or in sales that have had issues with situational poverty as a result of divorce or taking care of a loved one and things like that. So we really crossed the gamut of individuals that we're working with and employer companies in that setting.

When we look at the main components of our program – our project, we are looking at – currently at the time that we applied for the grant, we were working with the Employer Resource Networks in two of our four counties and had 10 employers participating, and we're looking at bringing the ERN to all four of our counties that we serve and ratcheting that out from 10 to 35 employers involved.

We want to be able to provide training opportunities to individuals that will lead to positions at our ERN companies. We want to improve the retention rates for companies participating in our ERN, and as a result of that we also want to improve the retention rates for individuals receiving training and placed at our companies and then provide ERN companies with assistance in filling open positions.

The partnerships that we have developed with our Employer Resource Network is we're working with our local community colleges. Again, the Department of Health and Human Services is a significant partner. Our local employers, which we refer to as community business partners, a West Michigan team who facilitates the ERN for us, our Michigan Works Southwest, which is our workforce board.

We work with all the local economic developers at the city level and the regional level as well, and community organizations such as credit unions, childcare providers, the early childhood education system, transportation, housing providers, and such. So we really want to engage the community because we know that there's going to be a ripple effect in our communities by being able to retain people at companies, keep them employed, keep them off of receiving assistance and utilizing – we want to leverage all community resources possible to get individuals to be self-sufficient and improve the retention in hopes that in later years they will not be a drain on the community.

So when we look at our list of outcomes, again, I'd identified increase in the counties that we're serving and the number of ERN companies participating in our network. So at the time we had a retention rate of 98 percent for those employees that have contact with a success coach, and our target is that 89 percent for the life of the grant.

Our employers will also receive assistance in developing career ladders. We want to make sure that the people that we train are going into the companies that we're working with and having an opportunity and understanding the value of their training. And coming in prepared will result in an opportunity for a career at the company and not just a kind of a stop here temporarily, but they're really looking at ways of becoming valuable members of that company over the long term.

We want to work with our employers in filling 33 percent of their open positions with a target of 355 over the course of our three years. That of the individuals that receive soft skills training, that 90 percent of them – of those 33 percent all open positions will receive soft skills training. The technical skills training we're going to have – provide 300 individuals with the long-term technical skills training to prepare them for placement, and then we also have 100 OJTs available as well. And that the individuals that remain with our employer post OJT completion will be 90 out of that 100, 90 percent success rate.

Some of the successes that we've had very early on is that we – again, we've really been able to engage our community stakeholders across multiple sectors and bring those multi-sector partnerships to the table to work toward common issues that our employers are facing. And so we've had city leaders, economic developers, private foundations, and employers working together in one of our counties to address the needs of childcare, those childcare barriers.

And so we're trying to develop a 24/7/365 childcare facility and we've been able to pull together these individuals and I think we're building momentum. We're not there yet, but we're working toward a great opportunity that will really provide some benefit to our communities. And then if we can get it established in one community, then could we then duplicate that in the other communities where we have companies involved in ERN?

Additionally, one of the other pieces that our ERN facilitator, one of our – we have a large employer with approximately 2500 employees. It's a large manufacturer, tier one automotive supplier that struggles with transportation as an issue. The community that they reside in does not have 24/7 public transportation available.

So we've taken and had implemented a ride share board and we've taken that concept and moved it and trying to create a closed employer ride share app and then try – test it with that one large employer. And then if that proves to be successful, then we would move that out to all the companies in the ERN and allow individuals needing transportation to kind of work toward resolving their issues together.

Challenges that we faced, we are really trying to make sure that the companies that participate, that typically we're having decision makers and individuals with significant weight at the table at the beginning, but over time they start delegating those attending meetings and participating and some of these decisions to lower level staffers. And it makes the process a little bit longer and far more time consuming to engage them in some of our strategies that we have for the grant.

Additionally, as we want to utilize our BSP model, trying to make sure that we're not adding to the number of contacts that our employers are receiving and making sure that we really implement and we utilize the BSPs that are responsible for our service delivery underneath our WIOA funding to be – kind of use the ERN as a tool in their tool belt as they are working with companies in our area. And that's been a little slow in getting them to buy in and realize that here's this additional thing that – service that they haven't had available previously but can utilize going forward.

Thank you very much for this opportunity. I'll be on for questions later. Thank you.

MS. LAWSON: Great. Thanks, Scott. That was terrific. It's interesting to hear about an effort where there's such a strong public-private partnership taking place and then especially that retention issue, which is so significant for so many employers. It sounds like you guys are doing some interesting things, and we'll be excited to watch you progress as you move through your project implementation. Thank you again.

And now, we're going to jump down to the south, Florida, CareerSource Florida performance funding model. We have joining us Rod Lewis and Rob White, both PhDs who I understand will be challenged to keep their time to seven to eight minutes. So, Rod and Rob, we welcome you, and I will turn it over to you, Rod. And if you would start by introducing yourself and Rob, if he is going to speak, and then kick it off as if this was a fresh taping, that would be very helpful.

ROD LEWIS: All right. Thank you so much. Glad to be here today. I'm Rod Lewis and with CareerSource Florida. I have Dr. Rob White with us here for questions and answers. Otherwise, I think he'll probably remain silent, but it is a pleasure to join you and talk for a little bit about CareerSource Florida's performance funding model. As she noted, I do have a PhD and so it is tough for us to say anything in any short period of time but here it goes.

The CareerSource Florida performance funding model is led by us here at CareerSource Florida. We're a bit of a different beast because we're a public-private not-for-profit partnership, and so we are the state's policy making board essentially. That part of the Department of Labor comes to us. The state entity that leads this, the actual state institution, is the Department of Economic Opportunity. I wrote this grant probably two or three months after walking in the door at CareerSource Florida. So unencumbered by knowledge, I tried to toss out a good idea, and so you'll get the chance to judge that as we go.

We received $3 million in funding. It's really a mix method center up to time series approach on the back side for looking at evaluation. Policy Research Group and PPMA leading that on the back side there, but we also have internal to our house two or three good PhD econometricians and half a good one in me. So we'll look to see what we can come up with as well as we walk forward.

This really stems from the not – record setting motion that money matters in terms of performance, that one can incent performance utilizing dollars. And this really is the creation of local area based performance funding model. We have 24 local area boards across the state of Florida. So we decided to see if we could incentivize them to meet and or exceed expectations, if we defined a series of precise metrics here, and looked over time at how we measure those metrics, how to better measure those metrics, worked with the local areas to determine how best to do that. And that's essentially what we did. So it was a strong process of engagement. I think I did – I recorded 50 visits with local area partners in the last year, and here's where we arrived.

We arrived at a TIE model, which is what we call target improve and excel, and I'll talk a little bit more about that in a second. But on the left-hand side of the slide here you have the TIE model metrics in brief, and this is the seven metrics that we arrived at. Unemployed placement rate, you wonder how and if this is different from common measures, and indeed it is because it is unemployed placement rate. It's the number of folks in the system last quarter who had a zero wage that you transferred to a wage in the system.

So it really is going from no wage to a wage. That's what we consider placement. Time in placement, the number of zero wage quarters that elapsed before they got that wage, average earnings per exit. That's a two-quarter measure. Earnings per dollar spent, this is something new. This is how much do the folks who walk out of your system earn for every dollar that you inject into the local system? Cost per employed exit, again this is not per dollar spent, but this is how much you spend for every employed exit that you get out of the system. Intensive business engagement, that really is a regionally defined metric there.

It is whatever you think it is as a region, as a local area as long as you're willing to send that engagement contact an e-mail that says, tell Rod Lewis up at the state board how well we're doing; right? Don't tell us. Tell Rod how well we're doing. And from that we derive business customer satisfaction. So if you're satisfied that that relationship is strong and steady, hit send on that survey. I'll count it engagement, and we'll keep moving.

The econometrically defined targets here, this is a bit of a complex process, but it really is what drives this. So we drive metric targets in a not dissimilar fashion from the way the feds do it, but we take a slightly different approach. And the goal here is to measure how hard it is for you to place someone, given the circumstances that you face.

So we take all of these things, national economy, state economy, all of these things that factor into how much money you have, that factor into whether you can place someone, how long it takes you to place someone, whether your businesses are satisfied or not, and we set a target based upon that.

So it is how well you would do, how well the average board would do, given the conditions that you're facing on this individual. And from there we say, well, as a minimum, we expect you to meet 75 percent of that target across these seven metrics that you see on the left-hand side. But those metrics themselves sum to a global target.

So we set each metric's value. We standardized them to be 100 points across these seven metrics, and we say, all right. You got to get to 75 on each of these metrics, but you got to get to 700 overall. Once you get past 75 on each metric, I don't care how you get to 700.

What's more, the further past 700 you go – right – you tell me where you're putting that foot on the gas. You tell me which metrics you're moving forward. The further past 700 you go globally, the more likely you are to be one of the most excellent boards in the state, one of the eight most excellent boards in the state. That's a different pot of money.

So you get a pot of money for receiving your target – for hitting your target. You get a pot of money for being among the top eight boards in terms of global scores in the state, and then you get a pot of money for being the most improved boards year over year, the top most eight improved boards.

So there's really ways to excel. There's three ways – three pathways to excellence in this model. There's three pathways to dollars, which is what's important there. And it really is a model that tries to say, you tell us where you ought to be. You tell us, given the resources you have, what are your strengths and weaknesses. You go you therefore and do, and we'll see it appear in the model and we'll reward you financially. And so that's what we really do here when talking about targeting, when talking about improvement, when talking about excellence.

And so our board allotted $5.65 million to this project across the state. One-third of that is about meeting your targets. One-third of that is about improvement, and one-third of that is excellence. And for those of you who have some background, I mean, this really is a equilibrium type model.

And so over time it should come to the point that improvement and excellence really is so hard to measure that it falls out of the model and we understand where your target is and we understand that that should be your target over time. We don't make any A priority assumption that by default we're intelligent enough to know what a regional board should be doing or how they should do it. We just set the targets and let you drive it where it needs to go.

Great successes here, data tools and interfaces, building – in the process of building what I think are really some great tools out there. You see the person when they walk in the door. They appear in the tool. You understand what their wage history is. You understand what the probability of placing them is within the model, what the probability of wage outcome is.

You understand how they holistically fit within this model, and you also understand as a second segment of this how they fit within the federal common measures suite of metrics as we develop those over time. So you get an understanding of how each individual case affects your outcome, how moving resources from one case to the other can speed up, can improve your outcomes within the model.

So that's a little bit about performance management. Again, these are all tools that we're developing. If a regional board says, hey, we don't want any part of that. We take them as they come. Take them as they come. We're not saying that. We're just saying, we're trying to give you the tools to get to where you need to be, if you choose to go there.

And then last is market intelligence, and I could spend the day on this. But this portal is designed to allow people to understand supply-demand analytics at the touch of a button. What we mean is the production of the supply of folks who are trained, who are qualified to meet a certain occupational series of guidelines in the market, this really is your CIPs, your classification or instructional programs, and how those line up in a modeling perspective with standard occupation codes and the sources of those demand.

So if you think about this holistically, this can really begin to allow regions to say, I've got this person walking in the door. I know they're typically good, given their characteristics, given where they walked in from, that they can fit into these segments of – to these market segments; right? And so on the back side of that you look to say, are we going to have demand there? Is it there? Do we have a place to put them? If the answer to that is yes, then you're really beginning to think holistically about how a workforce system should operate. So we're a ways away from getting all these tools into place, but this is where we're headed overall with this model.

So challenges, getting local areas – getting the data down to that level that they can utilize. It makes great sense to me. I happen to have a PhD in this stuff. So it should make sense to me. Getting it to the point that someone who doesn't can make sense of it is a challenge, but it's one that we're very quickly overcoming. And the second is we have a lot of antique data structures that live out there.

We have got to understand that this is 2016. We have got to migrate towards platforms that can talk to each other. We'll solve that problem. We're working hard to solve it here in Florida. I think we would need to work hard to solve it nationally. We need to make the best use of data that we spend millions and millions of dollars collecting. We need to make sure that we beat every single dollar worth of worth out of those data that we can.

So with that, that is all I have to say. I certainly thank you for your time. I realize that I'm just a few seconds over, which for a PhD, being just a few seconds over is nothing short of a miracle. So thank you so much.

MS. LAWSON: That was terrific, Rod. What an exciting project and how interesting it will be. You're the – I think of anybody we've heard so far, the metrics you have are really intriguing. So that would warrant a conversation separately all unto itself, I imagine. Well, thank you. That was terrific.

Paula from the Virginia Community College System is up next, and I will turn it over to you, Paula. If you would, start by introducing yourself and the name of your project and the community college. And once Paula finishes up, then we will go into Q and A. So those of you on the line listening in, thanks for hanging with us through the three previous [inaudible]. Stick with us for this last presentation, and then we'll – excuse me – have some time for questions and answers and some discussion. So let me turn it over to Paula Scott-Dehetre. Paula?

PAULA SCOTT-DEHETRE: Hi, Linda. Thank you very much. Excuse me, and good afternoon, everyone. We're broadcasting here live from Richmond, Virginia, and I'm with the Virginia Community College System office, which is the main headquarters for our 23 community colleges here in the Commonwealth. The name of our project is the Virginia Financial Success Network, and our tagline, if you can read that on our logo on our opening slide, is, "Building careers, growing credit, and decreasing debt."

MR. KEATING: Paula, still there?

MS. SCOTT-DEHETRE: Hi. Sorry about that.

MR. KEATING: That's OK. Paula, if you could just speak up a little, that would be great.

MS. SCOTT-DEHETRE: OK. Sure. Our volume's kind of been up and down. Is that loud enough now, Brian?

MR. KEATING: That's a little bit better. Sure. Go ahead.

MS. SCOTT-DEHETRE: OK.

MS. LAWSON: Yeah. And, hey, Brian, maybe we could just back up and start over just so we capture this well. So, Paula, if you wouldn't mind, and those of you hanging on the line here, if you wouldn't mind, let's just back up and start again. We want to be sure and – when we tape this, have everyone be able to hear you, Paula.

MS. SCOTT-DEHETRE: OK. Sorry about that.

MS. LAWSON: So let me jump over, and I'll turn it over to you, Paula, and let's just kick it off once again.

MS. SCOTT-DEHETRE: OK. Good afternoon. This is Paula Dehetre with the Virginia Community College System office in Richmond, Virginia. And the name brand that we've assigned to our Workforce Innovation Fund grant is the Virginia Financial Success Network, and the tagline, as you can see in our logo, is, "Building careers, growing credit, and decreasing debt."

We have the fortune of having a project that is type C, which is a goal of replicating an existing model or program, and our grant was a five-year grant set at a funding level of a little under $12 million. Our evaluation firm that we're working closely with is Public Policy Associates of Lansing, Michigan.

The heart of our project and the model that we are attempting to replicate is the Working Family Success Network model. You can see their little logo there in the top right corner, and the crux of this model is an integrated bundled service delivery to be carried out in our One-Stop centers or American job centers. And that service delivery is focused around three pillars, those being the typical services you receive in a One-Stop center, employment and training. Added onto that, seeking out work and income support for our customers, and finally financial literacy.

Our elevator pitch, if you will, is really to help to lift people out of poverty. This is a research study where our WIOA clients that are coming into the One-Stops that are found eligible for the WIOA program are then randomly selected to be part of this research study once they consent. And for the sake of time, I hope that you'll look back later to this link on You Tube, which is a three-minute video that describes very succinctly what the study is all about.

Just for an overview, this grant, we finished our planning year, and we have wrapped up the first quarter of our performance year. Now in the midst of our second year – second quarter – excuse me. VCCS serves as the grant recipient and fiscal agent for WIOA funding in the Commonwealth of Virginia, and we are working with six of our 15 local workforce investment areas in this research study. We entered into an MOU with those organizations, and as you can see, the six different regions outlined on the slide are very demographically and economically diverse.

Each of those areas received funding to hire a financial success coach and also has grant support for some of their case management costs. And these coaches are utilizing a software of the service with the customers to aid them in searching for employment, setting up training, finding themselves eligible hopefully for work and income supports, and a very special emphasis on building their financial literacy skills.

We are tasked with serving 1800 clients over a three-year period. Our clients will be, as I said, WIOA eligible age 18 and older, to include veterans and their spouses. So we hope that we will touch on some of our older youth as well, 18 to 24. We've outlined here what some of our recruitment strategies are. We spent a lot of time in the beginning of our planning year designing the video that I recommended you take a look at. We designed a hard copy passport, if you will, for services that the customer can carry with them, and later in my slides you'll see a link to that PDF so you can see exactly what that is. It's just like your passport that you'd use to travel internationally.

We've been trying to reach out to our existing clients in WIOA since July of 2015 and then of course approaching all of our new customers that come into the One-Stop centers. Again, the special feature of this project is that it is a random study focusing with one-on-one coaching and financial literacy skill development.

Our key partners, besides our six local areas, are, as we mentioned earlier, our evaluation firm, Public Policy Associates, a company out of Durham, North Carolina entitled MDC, and MDC is really the national expert in the Working Family Success model that I mentioned earlier. And finally the vendor that we've been partnering with for the software as a service is Solutions for Progress, which is based out of Philadelphia.

We're partnering with education, workforce, and business leaders in those six communities, and in addition to that, this model is also being implemented in four of our 23 community colleges under a different funding stream. They're supported by the philanthropy achieving the dream, and our hope is that over the life of this study that we'll be able to prove that the model does in fact work and we'd like to make it sustainable and build capacity in all 15 of our local areas as well as our 23 community colleges.

You can see on this slide all the outcomes that we're aiming for. We have our typical WIOA measures that you and I on the call all measure, and in addition to that we're focusing on financial literacy types of skills, helping people to apply for public benefits, increasing their net worth, improving their credit rating, achieving significant financial events once they build their assets after attaining employment, outcomes like that.

Some of the successes that we feel have been meaningful are that we are – we have created this new type of coach in Virginia called the financial success coach. In our community college system we're very much advocates of the coaching model. We have 9 or 10 different types of coaches, whether it's coaches for veterans, coaches for high school students, and now for financial success.

And colleagues of mine here at VCCS created a certification credential program called the Virginia adult career coach, and that's an online distance program as well as some classroom training that all of our coaches statewide are invited to participate in. And so our financial success coaches are either already certified or are in the process of completing their certification so that they're well poised to assist our customers.

Our next success is utilizing this software called the Benefit Bank as well as My Budget Coach. And frankly, that's the huge component of the $12 million budget. That's a sizeable expense, and hopefully will pay off in the end. The Benefit Bank is powered by the vendor Solutions for Progress. It's an online service that provides benefit eligibility as a screening tool. It helps the customer to apply right there with the coach at the computer. It's an IRS certified tax assistance and filing service.

So folks right now are coming in to file their tax returns for both federal and state taxes. My Budget Coach is a cloud-based suite of financial coaching tools and a curriculum that can be used remotely or with the in-person with the coach. It's a 12-month module where the client can learn how to establish a budget, get out of debt, set up a savings account, all the things that you really need in order to become financially sound. And this system will also help us to collect and analyze data and measure our client outcomes and organizational effectiveness.

As you can see, some of the work and income supports that our clients will be applying for include SNAP, TANF. They can fill out the FAFSA form, if they're looking for student financial aid, and a number of other supports that we hope to build out in the system in the months to come.

I talk about our success of return on investment. We're hoping that a lot of folks, as they file their taxes, will be pleasantly surprised to see tax returns come back to them that they were unaware they were eligible for or an earned income tax credit. This system allows folks to file back for three years. So if you hadn't filed in the past, you thought you didn't make enough money, you'll be able to reap those assets.

I list a number of challenges here we've found. It's been an interesting opportunity to be involved in the research study, but we wish we could have our planning year back as a do over. But we're – we've learned a lot from that, and as I mentioned, a few other items here that we'd be happy to talk with you about in more detail. So I'll stop there and look forward to any questions that you might have.

MS. LAWSON: Great. Thanks so much, Paula. That was really interesting, and it – I'm seeing a theme throughout many of our projects in that we all or many of us are using coaches and you of course in the financial side of things. But very interesting project, and we'll be anxious to see what happens with your study.

Let's move on at this point and open up the lines, Brian, for question and answer. We'd like to hear both from the audience, those of you who are dialing in today but not presenting, and also those of you who are presenting, if you have questions of each other. And, Jennifer Johnson, I know you might have a question for Scott. So I'm going to call you out maybe first, if you don't mind. But let's open it up now. If you need to unmute your phone, Brian, can you give instructions on that?

MR. KEATING: Yeah. Absolutely. So we're not going to blanketly unmute the phone line, but we are going to give you the option to unmute yourself, if you'd like. So if you'd like to ask a question or make a comment over the phone, the way to do that, presenters will just go ahead and chime in.

So we talked about that already, but if you're a participant, you can go ahead and press \*6 on your telephone's keypad. Go ahead and introduce yourself, ask your question or make your comment, and then once you're done asking your question or making your comment, if you could go ahead and press \*6 again to remute your line, that would be ideal as well. You can also ask a question or make a comment using the chat window that's on your screen. So we encourage you to do that as well, if you'd like.

But if you'd like to go ahead and unmute your phone line, we encourage you to do that now. Again, those instructions are on your screen. You can press \*6 to unmute your line. Again, it's \*6 again to remute. So if you'd like to do that, go ahead and please press \*6 on your phone line now. Otherwise, I'll turn it back to the team to take a look at – I don't think we've gotten any questions or comments over the chat so far other than a technical issue that came in. But if you'd like to type in your questions or comments into the chat, feel free to do that as well.

Linda, I guess I'll turn things back to you.

MS. LAWSON: Great. Thanks, Brian. We've heard from four really compelling grant projects today and want to hear your questions and comments. So I'm wondering from those of you on the phone, are others of you also using coaching in your intervention model? Feel free to type that into the chat window, if you are. And in the meantime, let's have questions. Anybody out there want to ask a question of one of the presenters today?

MS. JOHNSON: Hi. This is Jennifer with Incite, and I have a question for Scott. I have interest in hearing a little bit more about how you first approached businesses to really get them involved, what kind of messaging you used, and what their initial responses were and especially if they had hesitation, what that might have looked like, as we are considering approaching businesses with a similar idea and want to know kind of what your experience was, if you wouldn't mind speaking on that thought.

MR. CUBBERLY: Sure. I think one of the things is to try and initially target companies that really have a strong kind of social justice component in their current culture so that they want to proactively find ways to help their employees and are very concerned about that kind of retention from an employee-centered approach as opposed to their own benefits as the employer. And so one of the things that we've done is worked very closely with our economic developers to target companies for the initial ask.

And so we're on the verge of rolling out and adding another seven companies into one of our counties that we're not currently serving, and so the way we kind of targeted that is we brought the product out to presentations to local, like a manufacturing association, HR, round tables, things like that. So we've done kind of a five- to 10-minute presentation talking about the virtues of helping those individuals with colorful backgrounds or significant barriers to enter the workforce and how that can be something new for employers to kind of tap into a workforce that they haven't had to tap into previously.

And then from there start doing one-on-one meetings with companies that are identified by the economic developers and our business services team, and then just kind of really, really present it from the standpoint of they all know that they have employees that struggle but they may not be identifying what are the significant barriers that is causing their turnover.

So we ask the employers to – if they're interested in the model, that they would take their employer – employee roster and send it in an encrypted file to our state DHSS, and they run it through and try and match it up and provide them with here's 20 percent of your workforce, let's say, is actually receiving cash assistance. So we're not identifying who is receiving cash assistance but letting them know that you've got a significant population.

And so are those individuals some of your turnover problem or having any of your absentee issues? And then if that's the case, let's see what we can do to target and help those individuals by bringing that success coach on. And then we start talking about engaging and leveraging the other services in the community.

MS. LAWSON: Great. Great. Thank you, Scott. That's interesting. And, Jennifer, I know you have some interest in talking with Scott offline about their project and some further questions. So – but thank you, Scott, for that.

Jennifer, there is a question from Lynn Bajorek for you. She asks, "Does the initial assessment identify participants who could benefit from cognitive behavioral therapy and refer those folks into the program, or are all the participants that pass the random selection referred to the program?"

MS. JOHNSON: So this is Jennifer. If I'm understanding the question correctly – and correct me if I'm not understanding it correctly – the way it works is the assessment is set up as a job search activity credit that they can get for their UI weekly claim. So there's an incentive to take the assessment on its own.

The assessment not only measures job readiness but it also measures our three eligibility criteria, that is that they are a UI recipient, that they are at least 18 years old, and that they have a GED or a high school diploma. If they pass those three questions, regardless of what they answer for the job readiness questions, they are then referred to the program.

So they'll then at the end of that assessment be given a link to learn more about Rethinking Job Search and to register. And somebody can learn about the assessment through the UI letters that are sent out as well as by attending or hearing about it from workforce centers or anybody else in the community. Did I answer that question?

Q: You did. Thank you, Jennifer.

MS. JOHNSON: Sure. No problem.

MS. LAWSON: Great. Thank you, Jennifer. That's good.

The next question comes from Beth Brinly. She, I think, is in general asking all of today's participants if you could discuss what have been the most successful recruiting strategies for your program participants.

So this really gets to the heart of the project in that everyone is doing very targeted recruitment. So let me open it up. Rod, I don't know if you could answer that first, but could you jump in on that?

MR. LEWIS: I can, and I guess that the success in recruiting strategy is – I don't know who you would consider a participant in our case because we're just plainly a bit different, but if a participant here is a local workforce investment board, then $5.65 million is enough to solidify the recruitment strategy for us because we're not working with individuals. It's at the board level. So we had – we needed –

MS. LAWSON: Correct.

MR. LEWIS: We had to engage them. We had to create a model that was built by them, not by us, which we did. And then we also knew that we had to put enough cash oomph behind it to make it work. And $5.65 million seemed to be that number.

MS. LAWSON: Great. Yeah. I forgot, Rod, that you guys are really more system focused and not necessarily participant focused in that way. So thank you for that.

What about others of you? Paula, can you jump in and talk about recruitment?

MS. SCOTT-DEHETRE: Sure, although I want to thank Beth for asking this question because we don't have the silver bullet really. What we've tried is we did design the orientation video, as I mentioned, and this passport for services.

For outreach we've contacted by e-mail, snail mail, direct phone calls to existing customers, flyers, posters. We've developed press releases to issue in the community and local community newspapers, through social media. We have information on websites, and also we've got coaches going out to partners, our mandated One-Stop partners and networking with them to get the word out about the program.

We've considered doing an e-mail blast to all of our unemployed folks in the Commonwealth, but it's a challenge. We have to serve 1800 people, you really think 3600 because we have a treatment group and a control group and that's really less than three years we have to do that because our evaluation firm tells us that you've got to stop recruiting at some point and start just the service piece so they'll have time to evaluate the outcomes that are manifested by that service. But I'm welcome to any ideas that others have.

MS. LAWSON: OK. And you bring up a very good point, Paula, in that those grant projects that are part of a randomized control study, it's a heavier lift in recruitment, especially at those big numbers like 1800 because you have – you essentially have half the people you recruit are really going to be eligible and go into the study group. So a very big challenge and one that I imagine others are experiencing as well.

Let me hear – Jennifer, did I call on you for the recruitment question?

MS. JOHNSON: Not yet. So we are – our most – we sort of take a two-prong approach, and we did this through both using that relational piece so when somebody comes into a workforce center and is going through the process of understanding what resources are available to them and building a relationship with workforce center staff, that's an opportunity for staff to identify someone who could potentially benefit from our program and refer them through a connection and a relation piece.

We also sent out the unemployment insurance letters, which are actually in the form of e-mails to those who are computer literate and generally just want to get information quickly and be able to act and move on. So we approached it in two ways using both of those methods, and so far we are measuring how somebody heard about our program on our website.

And to date the majority of people are going to rethinkingjobsearch.org from hearing about it through the workforce centers, but we're seeing an increase of those who are responding to the UI letters as well. So we're excited to see that both of those are seeming to be pretty successful.

MS. LAWSON: Interesting. Interesting. It will be good to know how many actually do read the UI letters and respond through that vehicle. So good to know.

Now, let's see. Jennifer, you had asked Scott about a one-pager in talking about learning a little bit more about that project. We will have or we do have currently on the Workforce Innovation Fund website pretty simple one-pagers that talk about an overview of each project. But I think what you're asking for is a little bit more explaining it to or how you share your project with your partners.

So, Scott, it sounds like you have that. Do you want to talk about what you did in order to develop something of that nature?

MR. CUBBERLY: Yeah. We just tried and distilled down the type of typical barriers that our success coaches face. Previously the ERN facilitator has calculated a return on investment that we include on that. Last year, based on their calculation, the investment from individual employers that they do pay into a yearly membership fee to offset the cost of the success coach – and that's part of the sustainability piece.

And so based on the investment of the employer and the number of participants we see, we're looking at our ROI a little over 600 percent for last year for those companies that participated. So we include that on there. We include what employers say as far as they've – what they feel they're getting out of it, and then try and engage some of the additional features that we've had.

One of the other features that we have, by partnering with a credit union in each of the communities, we also offer small loans, less than $1,000, in order to keep individuals out of the predatory lending business and has a – (inaudible) – four savings account that's attached to that as well. So we try and include those pieces very quickly in a one-pager and then certainly do follow up with the companies afterwards.

MS. LAWSON: Interesting. Interesting. I hope that gets at your question, Jennifer. And also, Scott, I think if we can share that widely amongst the – your peers, other grantees, that would be a useful tool for others to see what you're doing.

I do have one follow-up question on that. When you anticipate you said 600 percent ROI, what are the factors in there? What are a few of the factors in there that you're looking at?

MR. CUBBERLY: So using the kind of the industry standard of $3500 per turn and the investment by the company of about $8500 is – buys each company one share of the success coach, which equates to one four-hour block per week of the success coach being on site at the company. And then the success coach is additionally available by text, e-mail, phone for those on off shifts and other individuals that are not comfortable meeting on site at the employer as well.

And so they use that, and then we keep and track how many individuals we service each year and then where those referrals come from within the company as well, so if they were referred by self-referral, by human resources, or by supervisors in the company that make those referrals to the success coach as well.

MS. LAWSON: Great. Great. I imagine, Paula, that what Scott's talking about might resonate a little bit with you in that you both have similar focuses around finance and coaching. Is there anything you'd want to add? We might have – might have lost –

MS. SCOTT-DEHETRE: This is Paula.

MS. LAWSON: Oh, there you are.

MS. SCOTT-DEHETRE: Hi. Sorry. I had stepped away, and so I missed Scott's remarks. I apologize.

MS. LAWSON: No worries. No worries. I apologize for calling you out. I just wanted to make sure we gave opportunity.

Let's jump over to Rachel's question for Jennifer. She asks about how tricky it was to adapt a program developed in another country for use in the workforce system here in our country. Jennifer, what about that?

MS. JOHNSON: Yes. This is Jennifer. I'm actually going to go ahead and turn this question over to Susan to answer.

MS. LAWSON: Oh, great.

SUSAN BARKSDALE: Hi, everyone. This is Susan, and I'm the developer of the curriculum. And we did not adapt the programs from the other countries because the programs in both the U.K. and Australia and New Zealand are very much mental health focused in terms of there are actually psychologists working in the equivalent of workforce centers in those countries. So they have individual therapy to address the symptoms of their unemployment as well as they typically do a shorter training on resilience, which would be skill-based.

So our program is – instead of couching it as therapy, we are calling it skill-based training because we're actually training people how to think differently. So we created the curriculum from scratch. We're fortunate to have the skills here because I'm a mental health practitioner who has done the mental health part but also a curriculum designer. So I was able to take the basic concepts of CBT and make that more skill-based and all focused on how to think differently to get a job faster. I hope that answers the question.

MS. LAWSON: Yeah. I think it does. That's interesting and certainly makes sense to not adapt their program but to fashion it after their program. So great. Thank you, Susan.

I want to jump over to Rod because, Rod, you said you have a very unique project in that you're really – this is a funding model – in a sense, a funding model. But I wondered if I could drill down for just a second and ask you a little bit more about the market intelligence portal and what that looks like. Can you talk about that a little bit?

MR. LEWIS: Sure. Certainly can. I'm happy to. Excuse me for that. My lunch here sort of got interrupted with my call.

If you look at labor market analytics across the United States and you looked at where we are in determining how educational programs from the certificate level straight on through to bachelors, masters, PhD, how they align with local workforce demands, that is part and parcel of what the market intelligence portal does.

So we take – for example, have built internally or have been working on building internally our own forecast models of CIP codes at the – and for those of you who don't know, those are classification of instructional programming codes. They exist at the six-digit level. Every institution in the United States that receives federal funding reports up through the National Center for Education statistics on their education outcomes.

So we have this data from 1984 forward for every institution in the United States, and we just take them and create time series models, time series forecast models based upon enrollment patterns and everything else that we can feed in for every county in the U.S. And we take that.

We lay it down beside occupational demands, supply-demand models at the county level as well, and we're working on developing some pretty sophisticated models that go beyond what the feds are doing with BLS right down to the county level. I know for many of you, if you look at it, you say, well, these data aren't available in my state at the county level. They soon will be through us, if not through anyone else.

But when you bring those two pieces of data together, the supply side and the demand side, then it becomes fairly easy to see where you have some alignment between education outcomes and demand for those types of talent. And if you look beyond that, also in places where you have oversupply and you think about it from the economic development perspective. How do you recruit in?

How do you recruit towards talent because talent is really king in the economic development world right now? So you say, well, I'm oversupplying these people. That's a bad thing. Let's focus our money somewhere else. No. That may not necessarily be the case. I'm oversupplying these people. Let's see which industries want to come in and take advantage of the product that we're producing here in this local area.

So if you look at it from the perspective of I need to understand what's going on in my market, I need to understand what's going on in my state, I need to understand what's going on nationally because these really are national questions at some level, this tool that we're developing called the market intelligence portal allows you to get there and allows you to do it quickly and efficiently.

And it allows you to tinker with the models internally as well, and it marries itself back very nicely with a lot of the work that we're doing on the workforce side, which is looking at incomes, looking at how people fit in because that's what we want to do with the time model. That's what we want to do with the grant is maximize earnings for the folks that are walking out the door. Part and parcel of that is understanding how they need to walk out the door, what types of talent they need to develop. So all this marries together nicely I think towards a holistic model, if that makes any sense.

MS. LAWSON: It does. It does, and it's so interesting. Thank you, Rod, for that. I realize we are just past our timeframe here, and so I think we need to wrap up at this point. We want to thank our presenters today and congratulate them on both terrific presentations but also on envisioning a better workforce system for businesses and for job seekers. So thank you for joining us today. We really appreciate your time and effort, and we appreciate those of you who took time to dial in and listen in.

And we have three more events coming up – or excuse me. Two more events coming up in this three-part series. For those of you on the call who have not yet registered, this does take an individual registration by each person who attends for each event. The next event is on next Wednesday, February 17th, same time, same station. Just be sure to register.

We'll be hearing from Los Angeles, New Orleans, San Diego, and the county of Venango. And then on the following Wednesday, February 24th, we'll have the pleasure of hearing from Kentuckiana Works and Monterey County and the workforce board up in New York, Herkimer, Madison, and Oneida Counties. So please be sure to register for those, and if you need a registration URL and you cannot download this – today's presentation and click on that URL, then feel free to reach out to your technical assistance coach and they can give you – get the URL to you.

Again, thank you today. We appreciate it, and I'm going to turn it over to Brian to close us out.

MR. KEATING: All right. Thanks so much, Linda. We are going to leave it there, but we are going to give you a few minutes here to give us your feedback on today's event. So you'll notice there are a couple of windows here to go ahead and vote. Would you recommend viewing this webinar to a colleague? Rate the overall quality of today's webinar, and then a couple of chat windows to give us open-ended feedback.

We'll go ahead and leave this webinar room open for a few minutes to give you an opportunity to give us that open-ended feedback. We're going to leave it there in terms of the audio for today. So again, please feel free to give us some feedback before you log off today. You should be able to join us for the other two events in the series, and thanks so much, everybody. We hope to see you on future events.

See you next week, if you're going to join us for the other webinars in this series. Have a great day, everybody.

(END)