**Workforce 3One**

**Transcript of Webinar**

**Mapping and Braiding of Funds, Part Two**

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BRIAN KEATING: All right. Welcome, everyone. Thank you for joining us today. My name is Brian. I'm here if you need anything technically speaking. Hopefully you do not, and I will get myself right out of the way because I know we have a lot of content to cover today. I'm going to move us over to the presentation today.

Before we do I just want to – I'm going to bring back that welcome chat. We're going to have a main chat where you can ask questions or make comments at any point during today's presentation, but please go ahead and introduce yourself in that welcome chat, if you haven't already done so. Also you should be listening to my audio through your computer speakers, but if you're having issues with the audio, we do have room on the teleconference today. So if you'd rather, you can certainly mute your computer speakers and dial into the teleconference. You'll find that information in a window at the top left-hand corner of your screen.

All right. Well, welcome, everyone, to the "Mapping and Braiding of Funds, Part Two" webinar. I'm going to get myself out of the way and introduce today's moderator, Stephen Duval. Stephen is the division chief of the Department of Labor, Employment and Training Administration Philadelphia regional office with the Office of State Systems, Division of Workforce Investment. Stephen, take it away.

STEPHEN DUVAL: Thank you, Brian, and good morning, everyone. I know that everyone is busy. It's a Monday morning, and I really do appreciate that you took the time out of your day to join us.

We have some rather important resources to share with you this morning, but before I turn things over to our presenters, I just wanted to take a few minutes to remind everyone that the region has been very involved as much as we can in wanting to provide states and locals with the resources needed to make this transition to the Workforce Innovation and Opportunity Act.

Just by way of background, at the beginning of this process, as soon as the law was passed, the region thought about how we could help all of our state and local partners to quickly engage in this new process of transitioning over to the Opportunity Act. So we, rather than focus on trying to understand the nuances of the particulars of a law, we focused on trying to provide effective training and technical assistance to help with this process.

We began back in October with a session here in Philadelphia called creating innovation in the public sector when we brought in Don Ione [ph], who talked about a different way of thinking about strategic planning. This webinar this morning is part of that ongoing series. It actually is – today's webinar is going to be highlights of two sessions that we did, and I'll get to that in a minute. But I just wanted to let you know that this is part of our investment in your learning as we go through this transition.

So in March of 2015 we had a session on strategic doing, and for those of you who were able to attend, strategic doing is a model that was developed out of the Purdue University. And it is a very different way of doing strategic planning, and we were able to bring people together to think about strategic doing as a process that enables you to get through implementation in very discreet, easy-to-follow steps. Many states continued with strategic doing, meaning they brought Purdue into their state and continued that work with their partners as they began the WIOA planning development process.

And then in April and May we provided a two-part series on asset resource mapping and innovative approaches to braiding funding and services. Today's webinar is a recap of those two sessions, which for all intents and purposes occurred over a period of three hours. We're going to cram it into an hour and a half today. So we're happy to – we're delighted to continue to provide these resources for you, but before I get to the actual agenda for today, there was one last piece that we did.

And that was to provide you with a view of the federal partnership's role in the planning process for Workforce Innovation and Opportunity. We actually did a webinar in June of 2015 where all of our federal partners provided their overview of their role in this process, and as many of you know, this planning process has – really did engage federal partners across education, labor, human services, and if you were doing a combined plan, it was other partners.

The important piece about the federal partnerships that we were able to offer was in November of 2015 we took our first cut at taking a look at all the federal investments that were going into our states in the region, and I think this is a – laid the groundwork, if you will, for what we're going to talk about this morning both on the asset mapping topic and the blending and braiding of funding. The federal partnership investments were billions of dollars spanning across a number of federal agencies, and when those dollars go to the states, they then get allocated out to not just state but local programs. And we wanted states to have the opportunity to see what that looked like so that they could engage in a more granular assessment of asset mapping and understanding how blending and braiding funding might work in your state and local area.

So today's webinar, as I said, is just a continuation of the two sessions we provided in April and May of last year. And for those of you who weren't able to attend, the link that I provided is an access – is access to the original webinars where you'll be able to see the full hour and a half for each presentation and the transcripts and the resources that were provided. Our presenters today have a lot of useful and rich information, and as I said, we're doing a highlight of both this piece and the session on blending and braiding funding. For the more in-depth piece of that you would – I would encourage you to check out these resources on Workforce3One following these links.

So before I turn things over, I just wanted to – sorry about that. I advanced the slide. One. Two. Oh, I guess we don't have the webinar agenda, but let me just tell you what we're going to do. As I already said, we're going to outline the major components for developing an asset map strategy. We're going to explain and define the various approaches to leveraging funds through braiding and blending with a focus on the differences between the two, and our – offer – we're going to offer recommendations on how do you utilize these resources to support your ongoing efforts for WIOA strategic planning but more importantly implementation.

We know that this – all of our states have been busy putting together a strategic plan. Many of you are getting ready to submit that plan through the portal. Pennsylvania, the one state in our region, has already done so. It's the first state in the region – in the country, for that matter, to have already submitted a plan. You all have been working very hard at strategic planning to get a plan document into ETA for review and approval. Our focus from this point on is to help you with implementation efforts. So today's webinar, as I said, is to provide you with insights and resources to how you might actualize your plan with your partners. And with that, one last thing.

Because we have so much content to cover today, we're not going to be able to answer questions live on the webinar. However, we encourage you to submit your questions in the chat box to the right of your screen. Our plan is to take your questions and turn it back in the form of a Q&A in the days following today's webinar. So we may not get – although we may not be able to answer your questions today, we will answer them in the form of a follow-up to all the presenters to this webinar.

So with that I'm going to turn things over to Charlotte Cahill, who's with Jobs for the Future. Charlotte and Gretchen Sullivan who's with Maher & Maher will be our primary presenters this morning. So I want to turn things over to them and encourage you to ask your questions in the chat box, and we'll get a response to your questions at a later date. Charlotte?

CHARLOTTE CAHILL: Great. Thanks, Stephen. So hi, everyone. I'm Charlotte Cahill. I am here to talk to you today about asset mapping, and just by way of a little bit of background who I am, so I am a senior program manager for the Pathways to Prosperity Network, which is a joint initiative of Jobs for the Future and the Harvard Graduate School of Education.

And the Pathways to Prosperity Network is a group of 12 states and regions that are working to build the grades 9 to 14 career pathways, so really these career pathways that begin in high school serving in-school youth. And the work takes place at both the state and regional levels, and then I'll talk in a little bit about how we think about regions.

But typically as we begin working in a region to build these career pathways, we carry out this asset mapping process, and I lead the process of asset mapping across the network. And so I wanted to start by talking a little bit about kind of what asset mapping is and why we think it's important for our work and I think also a valuable strategy for many of you as you're thinking about your work.

So asset mapping, broadly speaking, is perhaps not surprisingly this process of identifying information about assets in a region and then really kind of starting to think about mapping how those assets fit together.

So asset mapping would typically include kind of talking to stakeholders in a region really across sectors too, and I'll talk more about the sectors that are involved in asset mapping process. It involves research on kind of relevant policies and programs that are already in place.

Often it can involve looking at labor market data and synthesizing the data and information in order to kind of start the process of figuring out what assets exist in a region with a larger goal of thinking about how to link and leverage those assets in order to better serve customers.

So we think very deliberately about assets rather than about kind of needs in a region because thinking about needs can lead you down a path that makes it very difficult to figure out the next steps. So thinking about needs really is – leads to a focus on deficiencies and to then in many cases process in which people are trying to come up with what are programs that we need to implement in order to kind of compensate for those deficiencies?

In thinking about assets, what you're really doing is learning more about the work that's already happening and how to begin to knit together different programs and initiatives in a region in order to meet the needs of a region. It's a way of really avoiding duplication in programs by recognizing work that's already being done.

So asset mapping is important we think in developing kind of a regional strategy for in our case building career pathways, but this is also applicable to lots of other workforce initiatives and programs as well and to really a kind of coherent approach like that supported by WIOA of collaboration and working across sectors in order to leverage existing work, in order to sort of reduce or eliminate duplication of efforts?

It's a way of finding out what programs already exist and making sure that you're taking advantage of those programs rather than creating new programs that are doing largely the same thing. Asset mapping is also really important because it's a process of talking to lots of different people across sectors, and because of that it helps you to build engagement and buy-in among lots of different people as you develop a strategy for your work.

And finally, asset mapping is a way of assessing strengths and opportunities but also those gaps and challenges that would emerge in kind of a needs assessment or something else that was more need focused rather than asset focused.

So as you think about getting started with asset mapping, it's really key to begin by figuring out, well, what are you looking at in terms of an area to be asset mapped? And areas can kind of be defined in lots of different ways. So you might think about geographic boundaries, whether that's a city or a county or even a state.

You might think about regions in terms of governance or service areas. So it could be a workforce area. It could be kind of, again, an area that is defined by its governance structure, and it could be also a district for either kind of a K-12 district, as is often the case in my work, or a community college district.

Finally, the one way of thinking about a region in which to carry out this asset mapping work is to think about regional labor markets. We know that as we're thinking about workforce strategies, it's very important to think about what does labor market look like and to start to think about what the boundaries of those labor markets might be.

So two ways of thinking about what the labor market looks like are to think about the labor shed, which essentially refers to where workers live, or the commuter shed, which essentially refers to the area in which residents are employed. So either of those is a good way of starting to think about kind of a regional economy, a regional labor market, and to begin to think about kind of how to serve the workforce needs of that regional economy and labor market.

So once you've defined the area, the typical next step in asset mapping is to do some initial research, and this can really be a process of desk-based research where you're looking online or in publications that you may have to get more information about what's already being done and to start thinking too not just about what programs exist but what the goals of those programs are, if they're strategic plans.

Those are a great thing to review and to start thinking about how you can bring people together at the kind of program and implementation level around a set of common goals and to sort of take those goals and use them as the basis for developing a regional strategy for addressing workforce needs and serving clients.

After kind of that initial review, you will no doubt realize that there's still a lot more that you need to know, that there are gaps in the information. There may not be relevant publications. They may be outdated. They may just not cover everything that you're hoping to learn for one reason or another. So at that point it's really helpful to start brainstorming a list of people you would need to talk to to get the information that you're still missing.

And just as you're thinking about where to begin looking for this information, both for the desk-based research but then also thinking about kind of people to talk to, it's worth kind of thinking about these five categories of stakeholders and of information. So you'd want to find information about workforce and economic development initiatives that are already in place. You need information about policies, whether those are state, federal, or local policies, and related programs being operated by government agencies again at kind of any level of government. It's useful often to think about what's happening in K-12 education and postsecondary education and begin in the labor market.

And then once you have a list of stakeholders from across these sectors it's very helpful to try to sit down with them for in-person meetings in which you can really go over kind of the questions that you have and learn more about their work. And depending on kind of the timing of all of this, depending on kind of regional political dynamics, it may be really helpful to do these interviews not as one-on-one interviews but instead in kind of focused interview groups.

And the advantage to doing a group interview rather than an individual one-on-one interview is that with a group interview you can really get a conversation going about the asset mapping process and more broadly about what's already happening in the region. And I think one thing to keep in mind as you're planning these interviews is that you'll come into them with a set of questions based on your desk-based research, and I'll also in just a minute go through some of what I think are the key questions for various stakeholders you'd talk to. But the questions kind of reflect your understanding of what's already happening?

And so that may be your understanding based on your desk-based research or other knowledge that you have of workforce initiatives and programs in the area, but there may be things that you didn't think to ask simply because you don't know enough about what's already happening. And so for that reason it can be really helpful to put together these interview groups in which participants can talk with one another in a way that may expand the conversation beyond your initial thinking and questions.

And that's really key to one or two of the goals of these interviews, which are addressing gaps in the available information that you've sort of gathered through your desk-based research and then testing your understanding of what's happening in the area based on kind of your prior knowledge and on desk-based research.

Other questions to consider as you're conducting these interviews, and I should say that as you think about these focused interview groups, I'd say that there are essentially two ways to structure them. And one is to bring together participants by kind of stakeholder groups. So that could include employers, educators, workforce intermediaries, community-based organizations, other similar stakeholders?

And so bringing together people by stakeholder group is one way of structuring these kind of more focused interview groups. Another way is to bring together kind of cross-sector groups of stakeholders that are already working together so that you can get a kind of sense of what the roles of partners in a particular initiative or program are.

So as you're thinking about these interviews and thinking about the different stakeholder groups that you want to engage through these interviews, there's slightly different questions to ask for each stakeholder group. So for employers you might want to really take this opportunity to find out more about what their workforce needs are and to start sort of pushing them too to think a little bit about how they might be engaging in workforce initiatives in education in order to kind of develop their own workforce and talent development strategies.

Similarly, as you talk to educators, it's worth asking them, what are you doing to engage employers? How are you making sure that educational programs are really reflecting the needs of employers and labor market demand? Thinking about too what kinds of career information and advising are students getting?

So one key point here as we think about developing programs that are aligned with labor market demand is ensuring that students have a good understanding of where that demand lies and that they have an opportunity to really wave at as they're thinking about their options for education and training. Similarly it's important to ask educators how they're thinking about growing programs, developing new programs, what processes do they have in place for doing that? To what extent are they thinking about issues like alignment with labor market demand?

And then, again, as you think about conversations with intermediary organizations, it's really helpful to get a sense from them both of how they're engaging other stakeholders – so how are they – what role are they taking in engaging employers and engaging educators – but then also because intermediaries do play so much of that role of working across sectors, it's really helpful to get their perspective on overall what does collaboration look like in this region. How are we doing with that? Are there policy factors or other issues that are really affecting regional collaboration, that are affecting a region's capacity to build career-oriented education and workforce development programs?

And as you – and another key stakeholder group in this is people who are focused on economic development, and that could again be sort of economic development agencies, workforce agencies for that matter, or kind of community-based organizations with a strong interest in economic development. And as you think about tying workforce programs to regional labor market demand it's really helpful to also kind of plug into economic development strategies, which are very often grappling with similar issues, and making sure that there's alignment between various programs and approaches and goals for regional economic development.

And then again in sort of thinking about talking to all stakeholders it's always helpful to ask kind of what they see in terms of what's working and what's not working for regional collaboration? Are there other supports that would make regional collaboration easier, that would make it easier to link and leverage the programs rather than creating new ones? And to ask too, well, are there changes that would make it easier to do this? So this again kind of sets the stage for thinking about next steps after you've completed the initial asset mapping process.

So just thinking about kind of the steps in the process, so I've gone over the first two here, which are desk-based research phase and then conducting interviews. And then looking ahead the next steps in the process are sort of synthesizing everything you've learned from both the desk-based research and the stakeholder interviews.

And you probably will find that documents you've uncovered in your desk-based research phase contradict each other, that stakeholders are not necessarily all in agreement about what's working, what's not, what needs to happen in order to improve service to customers in the region. So this process of summarizing findings is a process both of saying what you've learned but also can very often be a process of laying out the areas where you've encountered contradictions.

And in the next steps of the process as you share the results you can go back to the stakeholders you've already engaged and say, so here's some areas where we don't have agreement yet and where we need to begin developing agreement. And based on that conversation and sharing the results, then the next step in asset mapping is really to develop an action plan.

So it's very helpful as you begin to sort of – as you begin the asset mapping process to really kind of think through what a timeline for all of this might look like and to share that with stakeholders in the process, stakeholders that you're intending to engage.

So I mentioned that it's really kind of useful and important to bring labor market information into the asset mapping process largely because it's really important to think about how workforce programs can lead customers to jobs that actually exist in the labor market? You want to make sure that as you're thinking about preparing people for jobs, that you're really sort of thinking about employer demand and thinking about the skills needed for those available jobs and building those into programs and initiatives.

So there are two key types of labor market information, which probably many of you are familiar with and which many of you likely have access to through kind of your state departments of labor or other agencies. And so the two types are really traditional labor market information and real-time labor market information, and both have some pros and cons.

So if you think about traditional labor market information, it's provided through public agencies, primarily the Bureau of Labor Statistics. It is free and publicly available. It is very reliable, and it's very kind of consistent. But it does have some limitations, and one is that it tends to be somewhat static. It doesn't tell you what's happening in the labor market right this second, and as a result it may not give you a clear sense of what are some emerging trends in the labor market.

So real-time labor market information can help you get to some of those questions about what's coming next, what's happening in the labor market right now. Real-time labor market information is drawn from online job postings using this kind of spidering technology, and because of that, while it's a really good snapshot of kind of what employers are looking for right this second, it also has some limitations?

And the primary one is simply that real-time labor market information is only as good as the online job postings. So if postings were incomplete, if they don't have good information about the skills and credentials that employers are seeking, then it is very likely to be the case that there will be gaps in the real-time labor market information that you're looking at. We also know that real-time labor market information tends not to be reliable for some industries that don't always use online job postings or that use them less consistently than other industries.

So two industries in which that is particularly the case are construction and manufacturing. So in those industries online job postings may not be entirely reliable, and as a result real-time labor market information may not be reliable. Still real-time labor market information, when coupled with traditional labor market information, provides a really good way of getting an overall sense of both kind of where the labor market is headed and what employers are looking for in a particular region in terms of skills and credentials.

And so labor market information can provide the basis for the development of programs that are really data-driven and are meeting the needs of regional economies as well as the needs of job seekers. So it enables you to identify kind of large and growing industries and occupations. So those would be industries in which, therefore, it might be advisable to start thinking about developing programs or strengthening existing programs.

Labor market information can also provide good information about available career ladders and career pathways. So it provides information in education and training requirements, on credentials, and on wages and salaries, which is I would argue something that's really important to consider as you're thinking about building out workforce programs. So it's not only a matter of thinking about where are there jobs but thinking about where are there jobs that are going to pay a living wage, that are really going to enable people to succeed, to support a family, and to move up in their careers.

Labor market information is also an opportunity to look for cross-cutting skills and occupations, so to develop programs that provide participants with skills that they can then go out and apply in a range of industries. One of the most common examples of this is IT skills, which are needed by employers in lots and lots of different industries. So if you look at data for occupations in IT, you're really looking at a set of occupations that cuts across industries with corresponding cross-cutting skills.

And this labor market information can then be integrated into both new programs and used to guide the development of new programs, but it can also be integrated into existing programs. And the asset mapping process, if it includes labor market information, as you're then kind of thinking about how to synthesize the information you've gathered and how to think about linking and leveraging existing programs, you can also think about how to use labor market information to inform that process and to ensure down the road that there is some kind of built-in mechanism for looking at labor market information and thinking about how to use that to inform program development in the future.

So once you've kind of conducted your desk-based research, you've conducted stakeholder interviews, you've looked at relevant asset mapping information, the next step is to really think about how to share everything you've learned with stakeholders in the region. And there are a few different ways to think about sharing the results, why to share the results, how to share the results, with whom to share the results.

So one of the key reasons to do this is to frame next steps for stakeholders to think about as you're moving forward with planning a regional approach and to workforce development. The results might include some recommendations to be shared about what you think are the best next steps, or they may include, instead of recommendations, questions for a broader group of people to consider, I mean, and to try to reach some consensus on before planning out kind of what the next steps should be.

These questions can be a really great way to continue the process of building buy-in across stakeholder groups that you started with the interview process. So once you've completed the interviews, then this can be a great opportunity to circle back to the same people you interviewed, probably to bring them together in a larger group and to say, OK, now that we've completed these interviews, here are the questions that we have about what current programs look like and what we should do next. So making sure that everybody feels like they have a voice in deciding what the next steps should be is a good way to really kind of get everybody on the same page about how best to move forward.

And as you think about how to share the results, what the format should be, a key question is, well, who's the audience for this? So again, thinking about who can benefit from this information and thinking about how to use the information to engage people in the process. And that may include people who haven't been engaged in the process up to this point, but you can now go to them and say, so we've been carrying out this asset mapping process, we've collected this information; we'd love to get your feedback on the information and to think about with you what the next steps should be.

And once you've determined the audience for your results, you might want to think about one or more formats in which to share the results that you can really tailor to the audience. So you might want to develop kind of a long report in which you really lay out everything you learned in the desk-based research, in the interviews, as you looked at labor market information, and then that report could include some next steps.

But of course not everybody is going to read a long report, and so it's also worth thinking about what are other ways of formatting the information, whether that's a presentation, whether that's a graphic representation. Depending on kind of other regional considerations, it may also be useful to think about how to share the results through informal conversations.

So this is just one example of a kind of quick and easy graphic representation of an asset map. I know it may be a little bit difficult to read, but this gives you some sense of how to begin looking at the different assets in an area and the relationships among them.

And once you've shared the results, then that really sets the stage for the action planning phase of asset mapping. And so big questions to think about here include what to do with the resources you've identified, and those resources may be financial resources. They may be programs or initiatives that are doing great work. Resources could even be knowledge. So somebody may know lots of things that would be useful to your work, and so part of what you need to do is think about how to draw them in better to this regional collaboration.

So start thinking about how best to leverage those resources, and then think about what would it take in order to do that. What kinds of supports are needed? Is there additional funding needed? Is there a need for regular meetings of stakeholders that aren't happening now to really foster collaboration across stakeholder groups, across sectors, across programs and initiatives?

And then to think too about what stakeholders need to be involved in efforts going forward. And that may be primarily the stakeholders that were initially identified as part of the asset mapping process, or they may be other stakeholders whose names or programs or initiatives emerged during the asset mapping process. So it's really worth thinking about both who should be involved and what should they do.

So just to kind of wrap up here and to summarize kind of what some initial steps would be if you want to think about launching an asset mapping process, I mean, there are a few key steps for getting started. The first is really thinking about, well, what am I asset mapping, so defining the area that's going to be included in the asset mapping.

And then once you've done that, to really think about what do you need to learn? And I've talked in kind of general terms here about learning about existing workforce initiatives, programs, education and training in the region, and how to link those and foster collaboration. But you may well have more specific objectives based on what you already know about what's happening in your region.

It's then important to develop a timeline for the process. It's certainly been my experience that particularly in the desk-based research phase of this but also in the interview stage, this can stretch out for as long as you'll let it? There's always another report to review or another person to talk to. So it's helpful to define a timeline and then really do your best to stick to it and to loop in other people and information as possible but always remembering that, as you share results at the end, that's also an opportunity to get more feedback and input that can be brought into the planning process.

And then the final kind of step as you launch this is to begin desk-based research, to start identifying people, programs, initiatives that aren't currently connected to your work but that are doing related work, and then to use that desk-based research as a jumping off point for other research and for the stakeholder interviews as part of the process. So with that I'm going to turn it over to Gretchen to talk about resource braiding.

GRETCHEN SULLIVAN: Great. Thank you, Charlotte, and good morning, everyone. This is Gretchen Sullivan with Maher & Maher, and I'm so pleased to be a part of this session and really glad for the opportunity to get to review some of the ideas and concepts – excuse me – that we covered during our last webinar series. And I think what Charlotte has shared with you is such a terrific and really important piece of what I'm going to be going over today, as asset mapping is obviously really foundational to the notion of aligning – identifying, aligning, and ultimately braiding resources. So glad to be with you today. I do want to encourage you all – I know Brian's been encouraging you all in the chat area there to please share any questions or comments as we go through this content. We're really interested in hearing from you and hearing what your experiences with these practices have been as well as what your needs are and your interests are moving forward. So please don't be shy, and please feel free to chime in there.

So I'm just going to start with a kind of an initial couple of slides that are really kind of an introduction to what we are talking about when we talk about aligning and braiding resources. And then the second part of my piece here is really focused on kind of a potential process framework for how you can apply approaches to resource braiding both at sort of the policy or strategic levels, if you will, at both state and local levels as well as at more of the service delivery level.

So just in terms of defining our terms, when we talk about alignment, we're really talking about identifying and then ultimately coordinating a variety of different resources to support shared goals and strategies across partners.

And I think it's important to emphasize from my perspective that we're talking about funding obviously, but we're talking about all resources. So we're really trying to think expansively here about the range of assets to use that term that can be brought to bear to support planning and ultimately service delivery at the implementation level. When we talk about braiding, we really are talking about weaving a variety of funding streams and other resources together to support comprehensive service delivery for the customer.

Obviously "blending resources" is a term that we also often hear. We're not focusing on blending here just because of the reality that with federal funding streams in particular we often don't have the flexibility of the greenlight to dump a bunch of different funds into a shared pot, if you will, because they each come with their own individual requirements. So recognizing that, what we're talking about today is really how can you weave together a variety of different resources to support comprehensive integrated service delivery for both job seeker and employer customers?

Obviously, I mean, there are many examples of areas that have received really flexible funding. Sometimes that's foundations, philanthropic, other that has more flexibility in terms of kind of lumping it in with other funds, but we're going to be focused on that aspect of braiding today.

The other thing I want to say just by way of introduction is that – is our focus today is really how can resources be blended across programs and funding streams to support customers? So we're really looking at approaches for aligning and braiding resources from a customer-centered perspective, kind of keeping the customer at the middle, and what that might look like from a service delivery perspective.

Given time and other constraints, we are not going into the nitty gritty of what that looks like form a fiscal or administrative perspective kind of in the back office, if you will. So this really is an introduction to the concept, how it works, what it's benefits are, and a potential process for moving in that direction. If you have other questions that you're interested in hearing more about down the line, again, certainly do share those as we go through this.

I think thinking about braided approach to leveraging resources, we're really thinking about making a shift in how we approach customer service delivery planning as well as implementation. And I think a key aspect of this shift is moving away from a notion that customers are primarily owned by a single agency or program and really moving to kind of a resource or network focus where the perspective that's adopted across all the partners is that customers kind of belong to an entire network of partners and programs and services and that we're really kind of thinking from that network perspective rather than somebody comes in the door and they're, say, initially enrolled in some program under WIOA and that's the program that kind of owns them forever. So it really is kind of moving from a program-based focus to a network-based focus.

And I think it's really important. Areas that have done this, whether statewide or regional or local areas, it certainly is I think the right thing to do from a resource stewardship perspective, but it really is an opportunity to improve the customer's experience of the broader workforce development system and to improve outcomes both for customers and for programs.

Areas that have taken this approach really have seen, by and large, improvements in their performance, which of course is a concern for everyone, with how customers feel about kind of ease of access and their interactions with the system in general. So really kind of thinking in that resource network perspective has a lot of benefits.

Going back to this notion of really customer-centered focus in terms of resource alignment and braiding, really what we're talking about here is kind of the backbone, is that customer needs and goals drive service planning and service delivery. And ultimately what we're aiming for is positive experience for customers and quality outcomes for them.

And when we talk about the kinds of things that we're braiding, obviously, as I said, we're talking funding streams, but we're also talking strategies. So how do you develop shared strategies across programs and across organizations? And we're talking about services and supports. So we're really trying to think about opportunities to braid these variety of resources together in implementing these strategies.

So as we kind of touched on before, the guiding philosophy really here is that customers' needs and a focus on their outcomes really drive the investment of a diverse portfolio, if you will, of funding streams and other resources. And it's that whole notion of keeping customers in the middle.

They're really the primary focus as opposed to program requirements or restrictions or funding streams being the primary front-end drivers of service design and service delivery. So the notion is the customer comes in the door through really high quality assessment and the engagement of multiple partners say in a career center. You figure out what the customer's needs are and what the desired outcomes are, and that's really what the customer sees and experiences at the front end.

And how to fund that and how you bring a variety of different resources together as appropriate to meet those customer needs is something that kind of happens again as a, quote-unquote, "back office function." And so it's getting a really good handle on what the needs, what the career goals are in the case of your job seekers; in the case of your employer customers, what it is they're struggling with, what they need help with, and figuring out from the variety of resources that are available what can be kind of knitted together, given the various requirements and allowable activities and restrictions on funding streams to try to build that portfolio to try to meet a range of the customer's needs.

So that's really kind of the guiding philosophy in terms of our focus here, and as you'll see when we get a little bit more into the framework, we're really kind of focused on all the levels of the workforce development system across all the partners that are critical to that system. So we think about kind of a boardroom to mailroom approach, enabling ways to use resources in different ways to support customers' needs and goals.

So we will be talking about kind of at that policy or planning or strategic level both state and locally how can you do shared planning, which many of you are obviously up to your elbows in right now with regard to WIOA. How can budgets and investments be aligned? How can policies be aligned to support and enable the braiding of resources? That sort of a thing.

At the service delivery level, how might your career center certification standards be used to incorporate and support the braiding of resources across partners and programs? How can operational plans that cross partners be developed? Looking at opportunities for shared performance targets that may be outside of your standard program-based performance targets.

We'll be talking about things like team-based case management or, in the case of business services, customer relationship management so that all partners are coming together and really doing that as a joint function. And that whole notion of really developing service plans and portfolios that are collaboratively developed and tap on the assets from a variety of different resources. So we're really going to be covering here in this framework everything sort of from the top, if you will, down to where the rubber hits the road.

And I won't go through these benefits one by one, but obviously there are some real critical benefits to taking this approach. I mean, obviously – and Charlotte touched on this I think a lot – it really realizes new efficiencies in terms of service delivery and strategic coordination. It's a way to reduce duplication where that may exist. It's also a way to expand capacity where funding and staff capacity is a challenge or a constraint.

It obviously improves program impacts and outcomes, which is always something of interest, and I think from the perspective of thinking for the long haul, taking this approach really helps you to get to scale. It builds shared investment and ultimately I think supports your sustainability, which can attract new investments and bring additional resources to the table. So from an organizational perspective, there are a significant number of benefits to resource alignment and braiding.

And as I've discussed a little bit, from the customer's perspective, I think it really improves the accessibility of the system, ease of use. I mean, the process feels more transparent when the customer is experiencing accessing resources from the perspective of something that isn't program-based or funding stream-based but aligns to their understanding of what their needs and interests are.

It brings additional service delivery options to them in a coordinated way and brings additional expertise from partners in the system to them and ultimately I think really improves their experience of the system and the value that they perceive they're getting from their interaction with the workforce system. So a lot of key benefits here I think from multiple perspectives.

So obviously, again, as you all know, the Opportunity Act really I think for ground some key opportunities around resource alignment and braiding, everything from joint planning, strategic planning across a variety of partners to encouraging that collaborative development of service delivery strategies, enhanced flexibility in terms of some funding and service design elements, partner co-location requirements, and opportunities to share some resources to support that.

So there are a number of ways in which I think WIOA really supports this, and folks are obviously thinking about these areas as they work on state, regional, and local planning. So just wanted to kind of make that connection there.

I'm going to move now into a potential framework for resource alignment and braiding and talk through some of the, quote, unquote, "steps," if you will, for adopting this kind of a model. And as you'll see, a key aspect of it is that asset mapping is a really critical element to this process. So we're going to go through this overall potential process and framework with you and talk through some of the key elements.

I think this is just kind of a high level graphic of some of the key elements that we've worked around in terms of exploring and adopting resource alignment and braiding strategies, and it starts at the top there with a shared vision that folks are aligned around and continues around the circle to the notion of ongoing evaluation, adjustment, continuous improvement. I'm going to walk through each of these areas with you to talk through what they mean.

I think it's really important to emphasize, while this looks pretty sequential, it's not – it's probably not that neat. It's more iterative than that. I think anybody who's been through any kind of a planning process, for instance, you know that you sometimes have to circle back. Some things get sort of initial focus. Some things get later focus, but for the sake of laying out an overall framework, I'm going to run through these one by one.

I think the other thing to emphasize – because sometimes when folks are taking this work on, it can be, frankly, a little bit overwhelming – is that I don't think you need to have each of these elements done to perfection in order to move forward with a priority around resource alignment and braiding. I think it's really important to start where you are and just dig in and know that you're probably going to be circling back to various elements as you move forward, and that's perfectly fine. I think the important thing is to dig in, not to wait. If you've got concerns around a particular area, that's something that can be worked through as part of the process.

So in terms of kind of a place to start, I think it's critical both at that policy or strategic level, again whether that's at the state level or whether that's at the local board level, that there really is a clear and shared vision for collaboration and for shared resources and shared investment across the partners that reflects partners' commitments to shared goals and shared strategies for all of their customer groups.

And that applies at the service delivery level as well. I mean, I think it's really critical that partners come together and set a vision for what is it that we're trying to achieve. What do we want to do? What do we want to be, and is everybody bought into that? And that really serves as a touchstone I think as partners move forward with this approach, reminding them of kind of what the end game is, what's the big picture that is aligning folks around this work, and helps serve as kind of a point to go back to when that's needed.

And so obviously there's – you all are working on strategic planning, thinking about what is that shared vision for us sort of as a state or as a regional area. And then operationally, what are the expectations for shared service delivery, shared service planning, and the integration of resources at that more operational level? So I think it's important to start there and to make sure that partners are aligned around that and bought into it. So that's one of the key elements.

Moving on, obviously partnerships are critical here. As you all well know, partnerships are pretty much critical anywhere to any of these key workforce and education efforts that you're taking up. And I think a really strong partnership and the buy in and investment of partners both at that strategic level and then at the service delivery level is really, really critical to getting this going and sustaining it over time.

I mean, I think those really strong partnerships are foundational to driving the work as it goes forward and really does help energize and support that work as people dig further into it. So I think it really is about engaging partners in this conversation, and I acknowledge when we're talking about new ways of identifying and braiding resources, sometimes those are tough conversations.

And obviously, as with any kind of strategic change initiative, there's – you're going to run into things that are going to have to be talked through, and sometimes it's challenging when things have been operating one way for a long time, to make a significant shift. But the commitment to those partnerships and those conversations is really so critical and can help move you through that and identify your opportunities as you move forward. So that's really foundation I think, those strong partnerships and the willingness of partners to come to the table and have those conversations.

Moving next, as Charlotte so ably discussed, the mapping of assets is obviously so critical to your ability obviously to identify what your resources are, financial and otherwise, and then to try to come up with some new strategies for knitting those together to support customers and customer service delivery.

So I think at that strategic or policy level there's obviously a leadership role for folks to really identify the range of federal, state, and local program resources that are available to be braided as well as other perhaps more non-traditional resources and to identify sort of gaps and need areas as well as key opportunity areas and really ultimately sharing some guidance and support around how the various resources that have been identified can be used. And that's important as well at the service delivery level.

So I think if you're thinking in terms of a career center, looking at the range of assets that are going into that center and how they can be brought together to support regional and local career development strategies. And again, it may help at that service delivery level to think about that potentially by customer group and by service activity type so that you kind of are able to build a map as Charlotte discussed of how you can pluck various resources to support key goals or strategies and service delivery for customers. So that asset mapping piece is really critical to this whole conversation around resource identification and alignment and braiding.

So once you've identified assets, obviously then you're getting to the point where you're thinking about how do we articulate these assets and really integrate them. And again, by integrate I mean the whole notion around braiding those resources.

So at that policy or strategic level, what supports can be provided to really try to empower and enable the braiding of resources throughout the system? And so thinking about ways that joint strategic planning can support that, shared – looking at budget priorities and how budgets and key priority investments across partners can really enable the focus on braiding resources.

Obviously, resource sharing agreements, MOUs are one way to do that. Looking at shared performance goals that help articulate kind of key strategies across partners may be another part of that, and very similarly at the service delivery level looking at how you can enable and empower the connecting of resources in support of customers is just as critical.

And at that more local or service delivery level, you can even get into conversations – and we've done some work on this in a couple of different areas – on taking a look, for instance, at customer flow and doing some customer flow mapping and trying to figure out what's working there and what's not in terms of how resources are or aren't being knitted together across programs and organizations.

You can look at job descriptions, staff roles and responsibilities and figure out ways to perhaps optimize those to enable and support the better coordination of resources across those various areas. Process flow in terms of service delivery is another area to look at.

So I think there are a number of ways both at kind of the policy or strategic level and then at that more operational level that areas can support through a variety of methods looking at aligning those resources and trying to get them more coordinated at all levels of the system. So I think that's a really critical piece to kind of pulling the trigger, if you will, on this and kind of – and getting it active once you've done some of the more foundational work.

So obviously – and again, we're not focused in today's session on the nitty gritty of fiscal and admin kind of ins and outs, but obviously the approach of integrating and braiding resources may require some adaptation in terms of administrative structures that are in place. So there may be state level admin processes and systems, data systems, financial tracking systems that may need to be examined and perhaps adjusted to support resource coordination, information sharing among partners, tracking of outcomes, that sort of a thing.

Very well may be the case at the service delivery level as well that there may need to be some adjustments to really enable people to better collaborate with one another and to share and to knit together resources for customers across those organizational and program funding streams. So it's certainly going to be a consideration, and we want to acknowledge that that's obviously the case, and this could be a very complex conversation. We understand that very much as well.

One piece of advice that I would share in doing some of this work with some areas is sometimes I think the concern is that we can't do resource alignment and braiding until we've completely overhauled our admin systems. And that becomes the thing that, frankly, puts the brakes on progress.

And I want to emphasize, I think really the partnership and the commitment of the partners to working in this way is really the most important and foundational piece of this, and I think administrative changes that may need to be made, obviously that's something that needs to be discussed.

But my advice would be don't let that be the thing that stops you from taking this up or moving forward. It's important that those conversations are considered, but I think my advice is start where you are and do the best you can within whatever environment you're operating in right now to try to make some progress in any of these areas that we're discussing in the framework.

So I think as you're getting more and more operational with this, training and technical assistance is probably going to be really important throughout all levels of the system. And I think if you're not currently operating in this way or in terms of your service delivery, if you're by and large organized kind of by program or by funding stream at the actual service delivery point in career centers or other places, this may be a significant shift.

And staff at all levels are going to need to be involved in conversations around what does this mean for me. How might this change my job? People need the opportunity to say, this is what I'm concerned about, or this is what I'm worried about or I don't understand. And they really need to be supported through training and through other kinds of technical assistance to enable them to operate in this environment and to have the skills that they need to operate successfully, which may be a little bit different than the skills that they have now.

So obviously, the training and other kinds of support for staff at all levels of the system and across partners in the system is really important. And I think cross-training is a key part of that. Peer mentoring and exchange at various levels of the system is an important part of that. And making sure that people have the opportunity to gain the knowledge that they need and the support that they need is really crucial to this.

And I think it is – I think I touched on this a little bit. I think it's important, if you're moving in this direction, especially if it's going to change what your service delivery looks like, which I think it very frequently does, that staff be involved in – from the beginning so they feel part of this change as opposed to a big scary change being kind of hoisted upon them from outside. So I think that's an important part of success here in terms of moving forward.

And again, this is really – adaptations to front-line service delivery, again, I think this is where the focus on resource alignment and resource braiding really is – that's sort of where the rubber hits the road. At that policy level I think it's really critical here to provide empowerment and guidance and support to enable staff across partners and at all level of the system to work in this way.

People will very likely have a lot of questions or concerns about getting something wrong or doing something wrong, and so it's really important throughout partners in the system to provide that clear guidance and to say, we empower you to operate in this way, and to provide guidance around what can and can't be done, frankly, so that folks understand what are their new opportunities. What might the restrictions still be, however, so that they feel comfortable to move forward?

And then at the service delivery level, in terms of what that might look like operationally, there are a number of different adaptations you might see. So looking at ways that you can do common intake and assessment across the various partners that are in your system, looking at moving to a team-based functional service delivery model where, rather than having partners kind of organized by either their partner or their program area, partners from multiple programs and funding streams are reorganized onto functionally-based teams that makes sense from a customer perspective.

So you might have kind of a welcome team. You might have a skill assessment and career planning team. You might have a job search and career advancement team. I mean, those are just some potential categories. There are many ways to organize this, but where partners from various parts of the system are bringing their resources to bear on a functional team that makes sense to customers in terms of what that team is supposed to do for them. So that's one change that you might see.

Team-based case management and customer relationship, that's another change that you might want to pursue so that you might have five different programs represented on a team that are jointly doing case management and planning on behalf of customers. I think looking at further opportunities – this kind of goes without saying – to really look at how you can bring services simultaneously to customers as opposed to sequentially through referrals is another key opportunity area here.

And then this last bullet on the service delivery area, thinking about ways you can integrate various things that happen in your centers, whether that's training, orientations, workshops, other kinds of things that bring together customers that are being served by different programs and funding streams, trying to realize some efficiencies there and do some cross-fertilization across those programs and funding streams.

So those are some ways I think that it's important to think about how do you empower the front-line service delivery to work in this way. What kind of guidance and support is needed, and then what might some of these changes look like – excuse me – on the ground in terms of how that changes customer flow, how that changes staffing and organization in a center, and what some of those potential new opportunities might be in terms of service delivery?

And then let's see. OK. It looks like we had a question come in from Cindy. Thank you so much for sharing that with us. And again, really do encourage others, if they have questions or want to share their interests or future needs, I would really appreciate you jumping in there so we can make sure to capture your interests and then, as Stephen said, follow up with you afterwards.

So in terms of kind of this final step here, if you will, obviously the notion of ongoing evaluation, adjustments, if necessary, continuous improvement is really critical here. So as you move to implement these models, the ongoing evaluation of performance data, other metrics that you and partners may be using relative to your resource braiding priorities, looking at customer feedback data, getting input from staff to figure out obviously what's working and what might need some tweaking in order to move forward.

And I think that's obviously important at that strategic level and just as critical from the service delivery level, really kind of figuring out what's working, what are the impacts, what might need to be adjusted or changed moving forward. So this is obviously something that happens. That ongoing evaluation and continuous improvement, that's something that's constant throughout this process, and that gets back to the notion of this process being kind of iterative and cyclical and ongoing rather than something that you do once and then it's done.

So I am – that concludes the slides that I was going to cover here today in terms of the resource alignment and braiding piece. I do see – OK. Thanks, Brian. You posted – OK. The question I think that came in from Cindy, thank you for sharing that. I don't know. Stephen, I'm going to defer to you because we do have a couple of minutes here I think before we get wrapped up. I just want to see what you all think in terms of timing.

MR. DUVAL: So yeah. Thank you very much, Charlotte and Gretchen. You shared a lot of really important, valuable information this morning. We have a few minutes. We have very few questions that came through the chat box. So I think we can use the time we have left, which is about 10 – 10 or 12 minutes, to try to delve into maybe Cindy's question, if you'd like.

MS. SULLIVAN: OK. Great. Well, and I would welcome – I would also – I'll give it my best shot and would welcome anyone else here on our team to chime in. And I would also welcome others on the phone to chime in on this issue because I think it is a really good one. What Cindy has said is that they've seen in some One-Stop partners that just wish to serve customers by appointment only and that the model that I've been talking about seems to indicate the customer services should be available at all times based on customer demand. Is that correct?

And I don't think – this is again – this is sort of Gretchen talking here. I don't know that – I don't think that it means that every service needs to be available at all times based upon customer demand. I don't know, and I would guess you guys would agree with me. I don't think that we have the staffing or the funding necessarily to make that work, but I think that there are ways to coordinate across partners.

If you're doing, for instance, team-based case management and you as a partnership group are delivering some services to customers, I think that there is a way to coordinate that, and it's probably a mixture that you don't say to customers, no. There are no walk-in services available, but you also don't say to customers, you can call 24/7 and get whatever you want whenever you want it. So I think it's probably, from my perspective, some mix based upon whatever staffing looks like in your One-Stops, what your resource mix is in there.

I think the ultimate goal would be how can you better kind of integrate that service delivery experience, coordinate among the partners to bring their resources to bear so the customers are getting an experience that they value. And some of that might be walk in on demand, and some of that might be you've worked on a joint career development plan. A number of partners are involved in that and putting their resources to it, and you're meeting with the customer on a regular basis by appointment to try to talk through what's working, where they are, that sort of a thing.

So that's kind of – I don't know if that – I don't think there's a real clear cut answer on that, and I don't think it's sort of correct versus incorrect. I think it's probably a mix of approaches. I hope that helps a little bit. Sorry. That was a bit of a long-winded answer.

MR. DUVAL: So Gretchen, this is Steve. I think your response is spot on regarding the providing the services to the customer, the having customer-centered design in our One-Stops is a critical piece.

WIOA did not negate that we're still available to provide career services to individuals. So it's a question of whether or not that One-Stop is operating to the extent that people who need critical services at the point in time when they need them get them.

So, I mean, I think the more intense services around case management are once somebody is enrolled in training do require the One-Stops to sort of manage that process differently than those individuals who access the One-Stops for job referrals, help with preparing for interviewing skills, being able to use the resources that the One-Stops have in the info centers should be available as openly as possible.

So it's just a matter of understanding that the career centers are generally open during regular business hours and accessible to anyone in the community who needs help with employment. And as I said, but once you get into the training aspects of the Opportunity Act, that becomes more of an intensive service or one that would require maybe scheduling of people as needed.

MS. SULLIVAN: Great. Thank you, Stephen.

Other questions, it's looking like maybe another one just came in. This is great. We really do encourage you to share your questions, and Charlotte and I and others will do the very best we can to answer them.

So Amy would like an example of an organization that's implemented a braided funding process starting with asset mapping and getting into the nitty gritty. Given time constraints today, we weren't able to discuss case studies. There are a couple of areas that I'm familiar with that have taken this approach up and have been doing it for some time. So I can – I'm not sure what the best way is to share that information. Maybe that can be something that as a follow up in our – in any Q&A that's distributed, maybe we could include some additional information for you that would be helpful in terms of areas that have done this.

And I think also just one other note on that. I think a lot of folks are probably in the process of doing this, especially given some of the opportunities under WIOA. So my – I would anticipate that a lot more areas are taking this up and are probably at some stage in the process as well. But I'll be happy to put together and share with Stephen some examples that I'm familiar with.

MR. DUVAL: That would be helpful, Gretchen.

MS. SULLIVAN: OK. Any other questions for me or Charlotte or others that you'd like to share?

MR. DUVAL: So I think we have sort of reached that point where we can thank everybody for their time this morning. I will remind you that we didn't get a lot of questions. So I'm not quite sure what the FAQ will look like going back out, but there are the – I did provide you with the links to the Workforce3One full webinars, separate webinars on asset mapping and leveraging resources. And I think, Gretchen – I may be wrong, but there were examples of states and local areas in your presentation from last May that highlighted some best practices.

MS. SULLIVAN: You're right. Yeah. There were. There were.

MR. DUVAL: So I would encourage the participants to review the webinars from the previous April, May broadcasts. I will also, in turning out the limited FAQs, highlight maybe some of those from the webinar so that you will be encouraged to review them for more detail.

MS. SULLIVAN: Great. Thank you.

MR. DUVAL: So it looks like we've reached the end of our discussion. I just want to just say to folks that the planning process was arduous at best, particularly if you have many new partners that you're bringing to the table. Implementation is going to be as arduous, if not more, and our point this morning in offering you this opportunity to think about asset mapping and blending or braiding of resources was to think about it in the context of implementation of these strategic plans. That's the hard work before us.

As a region we want to continue to provide our state and local partners with the technical assistance necessary to implement successful plans. So going forward we'll be interested in hearing from you other things that you need, and we certainly will be in conversation with our state and local partners with regard to successful WIOA implementation going forward.

MR. KEATING: All right. Great. It sounds like we're going to leave it there. We are going to invite you to go ahead and give us some feedback before we wrap today. So we brought up a couple of polling windows and some places where you can give us your comments. So please go ahead and vote in those polls, and then go ahead and give us any open-ended feedback you have in the chat windows on your screen.

And we'll end the audio now, but we'll go ahead and leave this webinar room open for a few minutes to give you an opportunity to give us that feedback. So thanks so much, everyone, for participating today, and hope to see you on future webinars. Have a great day, everybody.

(END)