**WorkforceGPS**

**Transcript of Webinar**

**H-1B America's Promise**

**Promising Practices for Program Implementation**

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LAURA CASERTANO: (In progress) – I'll give you another second or two to do that and then we're going to move on. But for now you're going to create your virtual nametag.

All right. And I'm going to go into our first polling question; I'll bring it up for you now. So you should see on your screen the polling question come up, and we're going to ask now to select the role that you play in your America's Promise grant. I see some of you have entered already. If you haven't, just go ahead and select one of those radio buttons. Let us know if you are the authorized representative, the program director/manager, training partner, or other. If other, just take a moment and type into the chat what your role.

It looks like most of you are the program director/manager; that's great. There are also some authorized representatives. And everyone who's other, if you could just type it into that chat.

And I'm going to bring the poll down now. And again, I want to welcome everyone to today's webinar, "H-1B America's Promise: Promising Practice for Program Implementation." And I'm going to turn things over to your moderator today, Gregory Scheib. He's a workforce analyst for the U.S. Department of Labor. Gregory?

GREGORY SCHEIB: All right. Thanks, Laura. Hello, everyone. It is me, Greg Scheib. I'm the program lead for the America's Promise grant and I'll be starting us out this afternoon and then handing it over to Erika in just a little bit. We're really excited to have you all join us for today's technical assistance webinar.

The goal today is to provide you tips and recommendations for building a strong foundation for effective program implementation so that your America's Promise program can be as successful as it can be.

This is our first America's Promise technical assistance webinar and it's just the beginning of the ongoing technical assistance that we'll be providing to you over the course of the grant. We certainly encourage you all to be active participants in these technical assistance opportunities so that we can better serve you, and of course, you can better serve your participants.

So right now I'd like to go ahead and introduce our presenters for today's webinar. Our first presenter is Michael Laidlaw, a TA coach from our partner organization, High Impact Partners, who has over 36 years of experience in organizational consulting in diverse industries and sectors, including the military, education, nonprofit, and government. He's the founder of SKL Associates, a human resources and organizational developments consulting firm.

We've also got Bruce Rankin, a TA coach from our partner organization the American Association of Community Colleges. Bruce has more than 30 years of experience working with federal agencies and private foundations in project planning and management. He has contributed to the success of a wide range of technical assistance public policy research and performance measurement projects for the U.S. Departments of Education, Commerce, and of course, the Department of Labor.

And finally, Erika Humphrey, who is the lead TA coach on the America's Promise grant and is also from our partner organization, High Impact Partners. She's an educational professional with 12 years' experience in curriculum design and development, program implementation, workforce development and training; and she's worked as a performance coach on a number of DOL-sponsored programs including the Re-entry Employment Opportunities grant, Job Accelerator grants, Ready to Work, and our technical skills training grants. She's also assisted with recruitment and enrollment, employer engagement and sustainability, and team building.

And with that I'm actually going to go ahead and turn it over to Erika, who's going to take you through the rest of today's presentation.

ERIKA HUMPHREY: Great. Thank you, Greg. And as Greg mentioned, on behalf of the TA team we want to welcome you to our first webinar. Today we know that we have grantees from different levels of grant experience, so for some of you this will be new information and for others it will be a refresher. But overall we want to set all of our grantees up for success.

So I just want to share today's objectives. We're going to be providing program implementation strategies and tips on four topics. Our first topic will be looking at forecasting and projecting staffing needs to support your America's Promise project.

We're also going to be talking about leveraging existing resources and partnerships effectively. We're also going to share some tools to measure your progress (readily ?), and we'll also be talking about incorporating sustainability strategies early in your grant performance period.

Now I just want to look at the map just as a reminder just to share where your peers are located. We have peers all over the United States. Our goal moving forward is also focusing a lot on peer-to-peer, so this is a good opportunity to know where your peers are located. Next slide.

We're going to start off with a polling question. The focus is, "Which program implementation area has been your main focus over the last month?" And if everyone could vote that would be great. And you don't have to just pick one. It can be different answers that reflect where you are in your grant cycle.

OK. Looks like staffing, a large number; partnership development; outreach and recruitment, we have 11 there; participation and retention, OK. Great.

So again, this webinar will be providing varied strategies and tips. Next slide.

Now I'd like to turn it over to Michael Laidlaw. He'll be discussing forecasting and projecting staffing needs to support your grant. Michael?

MICHAEL LAIDLAW: Good afternoon, all. I see by the survey results that a lot of folks are still focusing on staffing over the last month or so, which is a great thing.

First I'm going to talk about what is the ideal staffing structure. There isn't anything – there's no such thing as an ideal staffing structure. Really the ideal staffing structure is the one that's best suited to advance your goals and help you achieve your outcomes.

And so while this may be a great idea to look at what some of your peers are actually doing or maybe what you're done in the past, it's more important now to look at the statement of work in your organizational plan to determine what is the best staffing structure that's going to help you implement this grant. If you had grants before, the changes in dynamics may be actually different. Your key partners are also going to be different.

So I want to talk about a couple of things that you ought to consider. And I realize there's still a few people on the call who are still putting their staffing structure together. Some of them have actually delayed their staffing plan. I know there are a couple of individuals who have actually delayed hiring a retention specialist, which is really important. I'm looking at the survey now and I see a lot of folks have outreach and recruitment.

And so what I want to do is talk about some things to consider when looking at your staffing plan and being strategic about it. First, as the lead person for the grant, it's important that you get a great idea of what's the requirements for this particular grant; what's it going to take to actually be successful. And then after you've done that, then as soon as possible reach out to your key partners – those individuals, whether it's going to be the CBOs – community-based organizations – or the other partners who actually part of this grant went to.

And then what you want to do as a group is start looking at what are the major components and the competencies that are required for this grant's success as far as staffing is concerned. So identify the roles, responsibilities; and also after you've actually done that as a group you want to go back and look and see what is the role that each stakeholder will actually plan in this grant's success and what's the role you as the director of the grant is actually going to play in the success of this specific grant.

Another thing you want to do is look at your internal support system. What do you have in your particular organization? Remember, there's no one in the grant who's actually a standalone. You're part of an overall organization. And so if there's some resources internally that you can actually utilize to get this done and not depend way too much on your partners, because certain things – the internal resources you have more control over that as opposed to the resources and the timing and the priorities of your other key stakeholders who are going to be helping out.

So again, start off by first understanding what the roles and responsibilities are and then convening with your key stakeholders. I know this can be a challenge at times to predict the future and really project what the staffing should be. So one of the things you can actually do is to look at mapping your process, look at the entire recruitment and outreach process from the beginning to the end, and look to see what's the roles and responsibilities; who's best suited to perform some of these roles and responsibilities. That may be you; others may be some of our key stakeholders.

And that roles and responsibilities that cannot be done by you or your partners, those are the roles and responsibilities you want to fill via staffing. And when we talk about staffing, there are a couple things that we want to consider. We want to look at what are some of the roles and responsibilities that can be done internally. What's the roles and responsibilities and the duties that – you should probably looking identifying – and this is the gap analysis – a contractor or volunteer to actually get this done.

I know one of my grantees decided to not bring on board an individual to help with the retention process, which is a great idea because what they did not want to do is have a retention specialist sitting there – (inaudible) – comes when they actually have recruitment outreach to actually focus on. So that was actually a great idea.

One of the things you can also do in the interim is bring on board a volunteer who can perform some of those tasks. By that volunteer performing some of those tasks, you can get a better idea of the specific things that you'd like for that permanent staff member to actually do when he or she comes on board.

So again, convene with the stakeholders, what's actually the resources and specific contributions that they're going to provide. Discuss with them what you think the staffing strategy should be. Look to see how you're going to staff those roles and responsibilities. And look to see what sort of gap actually exists. Next slide, please.

Like I said, it's impossible to really predict everything that's going to happen, all the factors that's really going to impact the grant management. So one of the things you want to do is look at the what-if analysis. Think of some scenarios. What is the worst case scenario? As someone who's been around a while in different organizations I've seen so many things that are unpredictable. So you really want to look to see what is it that you can actually control; and if something happens, what are your responses?

One of the what-ifs we want to look at is what if your stakeholder doesn't live up to his or her commitment? And again, there are times when things are going to happen. It may be out of the control of that particular stakeholder. More than likely either you or one of your key partners will actually go through some leadership and management change. Either you or one of your key stakeholders will go through a restructure. Either you or one of your key stakeholders will actually go through loss of funding. Again, that's just par for the course.

And so what do you do in those situations? The best thing to do is to start planning now and look at those what-if scenarios.

One of the things that's going to help you also prepare for those what-ifs is by staying in touch with each of your key stakeholders. Find out what's going on in the community. You don't want to find out that one of your key partners actually lost funding, and here it is, the middle of the grant and now you don't have anyone who's taking care of the enrollment process.

So what you want to do is stay in touch with each of those guys and make sure that you're asking the right questions every time you guys have meetings, whether it's monthly meetings or biweekly meetings. But again, the communication's going to be critical there.

Forecasting priorities and competencies. There's situations where – and it happens in just about every grant – there's going to be situations where the competencies really don't match up, and I'm sure there's some folks who are experiencing that now. There's some grants where you really wanted to – where you thought the grant was going to require more of a enrollment specialist and a recruiter who's going to actually just put the ads out there and folks going to flock to your grant and respond to your ads. That's not always the case.

And so what you need to realize is that there are many times when you need to do more outreach than recruitment, and outreach and recruitment, although they go hand in hand, it's really two totally different things for certain grants. Outreach in my mind and for – I guess for this particular session, I usually see outreach more of going into the community and using targeted messages and communications to get to those individuals.

And so if you – (inaudible) – population happens to be a – the refugee committee – community, you don't want to use the same strategies in trying to reach the refugee community as you would try to reach someone who's in a reentry program or someone who is in a different population. So you have to be pretty strategic about that. So again, you need to look to see what is outreach and what is actually a recruitment piece.

Also, as far as the competencies for recruitment, when you're looking for a recruiter, most recruiters stay behind their desk and they use social media to actually do a lot of their recruitment. When we talk about outreach, it requires a different level of competencies. It really requires someone who is more of an outgoing people person who doesn't mind establishing relationships with CBOs who are well-informed and well-connected to the particular population that you're trying to serve. And so again, it's not going to be someone who's sitting behind the desk.

And so what if you have a situation where you thought you had hired a recruiter, and now, they're an outreach specialist? Well, one of the things I would definitely recommend is, if you see there isn't a great fit, if you could talk to that individual about determining if he or she can actually perform those roles or are you going to look at maybe augmenting that staff because this person is really a great recruiter but at the outset you really need more outreach than you need recruitment. And so you can actually look at augmenting your staffing situation on a temporary basis because you have a recruiter who you'll need for the long term.

Another thing I want to talk about is the internal organizational structure and the changes. About three years ago I was in New York City, and one of our key partners who actually did our staffing for us went bankrupt. And so we had three – about 340 temporary staff who were on that particular contract, and so once we lost – once that group went bankrupt – and we did not do a good job of actually staying in touch with them and finding out what their situation was. We heard rumors that they may actually go bankrupt, but we just thought it was a bad rumor.

And so we had over 340 people who were critical to our day-to-day operations, and so we had to scramble to actually find another contractor who'd be willing to take on these individuals immediately without actually doing a lot of risk management and assessment of their situation. That was pretty – it was pretty – (inaudible) – and caused a lot of anxiety for our temporary staff and also for our management. So I would again start looking at what are these what ifs and also be mindful about having a sole source for those who may be doing outreach or doing recruitment or your partners who are providing certain trainings and development.

So again, stay in touch with your folks. Make sure you know what's going on. Don't be surprised by anything because at the end of the day you're still the person that's going to be responsible for the success of this program.

I think that is the end of my presentation. So I'll turn it over to Bruce.

BRUCE RANKIN: Great. Thanks, Mike. And just a quick reminder – I see a few comments here popping up here – that if anybody has any questions along the way, just feel free to put that in the main chat box. We're all here getting ready to jump on these questions, and I see some of my colleagues have stolen some of my thunder. What I'm going to be talking about here is leveraging the available resources through your partnership. This element of the presentation highlights resources that are available to each of your regional workforce partnerships, and we expect that most of these tips are well-known.

So we're sharing these more or less as reminders and hope that they help stimulate some ideas, questions, and comments. In preparing this we did take a look at the composition of the grantees. We recognize that there – out of the 23, there are 11 postsecondary or education institutions, 11 workforce development boards or consortia, and one community-based organization. And as Erika noted earlier, many of you are at different points in your implementation process. So we're providing broad recommendations here.

MS. HUMPHREY: Great.

MR. RANKIN: So here – and again, Jan, thanks for bringing this up, but just take advantage of the resources that you have available to you. Your proposals all contain plans for coordinating activities with your workforce, education, employer, and community-based partners. Some of these connections can get lost during the implementation process. So what we've done here is highlighted a few tips on sort of maintaining those relationships and leveraging that support.

So on the public workforce system perhaps one of your most valuable relationships is through that state or local workforce system. You've established these connections in your proposal and most likely have worked with these entities in the past or, as I just mentioned, 11 of you actually represent that system or are connected directly to it. We encourage you to take advantage of their services, to access complimentary funding streams, resources to support your grant, and during the early stages they can be particularly helpful with recruitment, outreach, validating your training strategies, and just generally providing support to your implementation process.

The other thing – and this is the last data point – an option to consider is going through the process of accessing your state's UI system to secure employment, wage, or tax data. So on this point we understand that you are tracking your outcomes in real time. State and UI wage data can often lag up to six months after completion. So we're suggesting it here as perhaps a complimentary source of data to verify what you're reporting in your QPRs and through the online reporting system.

Turning over to the business and economic development side, each of your grants reflect the participation of your employer partners. Common challenge that we've noticed so far in some of the feedback you provided is how to make best use of limited employer access. This can be accomplished by planning ahead, consolidating activities, and limiting time commitments and requests to high value, high return asks.

And while it's early in your grant programs, you should verify employer commitments to fund work-based learning opportunities such as internships, apprenticeships, as well as provide regular updates on the progress of your participants. And on the employer and business front the other side to keep in mind are financial and material support commitments, that those should be in process, if not in place at this point.

And then lastly, in looking at your economic development agencies and employer associations, to possibly assist with outreach, highlighting the availability of the training that magnifies your recruiting message.

On the education and training providers many of you reported that you've begun training delivery and/or have program participants enrolled for fall courses. Some of the grantees reported challenges implementing their programs where training providers have identified challenges such as additional or unforeseen costs, shortages of qualified instructors, or programs that haven't been fully developed.

If you haven't already, we recommend a review of your agreement with your training provider to ensure that you're all on the same page. This begins with planned training delivery, admissions and registration process, and progress tracking.

You also want to make sure that you have a process in place to review your training content to make sure it reflects involving employer requirements. And then a potentially valuable resource that you may want to consider – and this is putting a plug in for our ETA sponsors here – are SkillsCommons and WorkforceGPS. Both of these online repositories contain thousands of independently reviewed curriculum materials and resources. These are all available for your use free of charge, and as a plug to the coaches here, we can assist you in researching those resources. OK.

And now, turning to community-based organizations, these folks can provide a rich source of insight in reaching out to and better understanding targeted populations. They can serve as a conduit to highlight the availability of training and recruit prospective participants. They may also be able to help link participants to supportive services that can improve outcomes by increasing persistence and completion rates. Leveraging this relationship may be helpful in meeting your performance goals.

So now, we're going to turn to a polling question, and we're talking about the core partners and how often you connect with them. And to put this into context, what we're looking for here is what your current plan is, recognizing this will evolve over time, to connect with your core partners, those folks that were included in your original grant proposal. We'll give you a second. And if we haven't emphasized it yet, we're all about communicating early and often with your partners. Great. OK. Super. So it does look to be more frequently than the quarterly performance reports. Great.

OK. I get to continue on here. Just real quickly on the communications plan, one of the things that we want to highlight is that good two-way communications are critical amongst all your partners, and the starting point for that of course is a communications plan to facilitate effective and efficient communications that connect with your target audiences.

And those of course would include your starting with your partners but also the region that you're serving here. One of the components that we want to emphasize there is how often you update your partners, how often they update you on progress, your strategy to connect with your region, and how you'll assess the effectiveness of this communication effort and from that standpoint, from a qualitative or quantitative assessment point of view or how your project is progressing.

So again, going back to the last slide, we see that it's almost a 50/50 split between weekly and monthly communications, and again, the message that we're certainly encouraging early in your grant implementation is to connect with your partners early and often and make sure that the regional plan – implementation plan is progressing.

And one last point I think Laura brought up at the beginning of the webinar. We actually have a very simple communications template that's available in the download box. As I mentioned before, you can reach out to your coach. There are many, many examples of these on WorkforceGPS and, again, on SkillsCommons, and so we'd be more than happy to help you by researching those and providing examples. Great.

So I think we get to go to another polling question. Try to collect as much information as we can. So in summarizing leveraging resources and partnerships, what we want you to – want to know from you are your thoughts on taking advantage of these resources, and please indicate all that apply by letting us know how you plan to leverage your partnerships. And I thought just to clarify some of these; I'll just go through quickly.

Additional resources would include things like financial material and technical assistance from your partners. Community assets would include support from the education, workforce, and economic development entities. Community – or advisory capacity, tapping into the technical and leadership skills of your partners. Opening doors relates to taking advantage of the community-based organizations in your region, and then expanding capacity would be to take advantage of staff resources that your partners might be able to add in addition to what's been outlined in your original implementation plan.

So just looking at the results here real quickly, it looks like leveraging the community assets, basically your education, workforce, economic development teams. But across the board it shows that I think pretty much everybody's looking at all of these as ways to improve your implementation plan. OK. Great.

So I think at that point, again, we go back to just raising questions. The reminder – and I see that there's some questions that are starting to pop up now. So we'll go ahead and take a look at those and – excuse me.

MS. HUMPHREY: So we have a question here where it states that, "One issue I have encountered," a grantee mentioned, "is working with employers on the topic of establishing OJT internships, apprenticeships, as in legal process and concerns regarding data reporting. Does anyone have any experiences applying the participant data collection process for employers while maintaining data integrity and scrutiny?"

MR. RANKIN: So I don't know that there's a real simple answer. I know personally I'm familiar with the challenges of certainly maintaining the data integrity and security of any kind of personal – personally identifiable information, PII. But I don't think we're really in a position to comment on sort of the legal process or restrictions, but we'll take that as an action item. Yeah.

And working – the thought is with the workforce system that those folks probably can provide some help, especially with the PIRL, which for folks that may not know, that's the Department of Labor's data collection process, that performance reporting database that all the workforce system collects outcomes under WIOA. So, Sean, we'll certainly take note of that and we'll probably get back to you offline afterwards but that's a great question. Thank you for sharing that with us. Great. OK.

MS. HUMPHREY: Are there any additional questions from grantees at this time when we're talking if – any leveraging your partnerships and staffing questions before we move on?

MR. RANKIN: Great.

MS. HUMPHREY: OK. We're going to turn it back over to Bruce.

MR. RANKIN: Right.

MS. HUMPHREY: And he's going to share tip number three, how to measure your progress regularly. He's going to give some strategies and tips.

MR. RANKIN: Great. We're in the home stretch here, folks. So each of you created a comprehensive work plan and budget as part of your proposals, and these plans form the basis for your quarterly performance and financial reports. A regular review of these goals and the context of your implementation plan help to highlight areas of concern that you can then raise with your FPO or your coach. Most case or project management tools include reporting features that can be customized. You can also use tools like Microsoft Excel to produce scan charts and data tables to track your outcomes. The next few slides provide a few simple examples of project management tools and practice. Great.

So this first example everybody should recognize. That's just the template from the solicitation document. Each of you created a work plan as part of your proposal and it sounds pretty simple but a core element of regular risk assessment is focusing on the completion of deliverables and achieving milestones. So just regularly revisiting this and reminding, oh, that's right. We thought we would do this by this date, or we had an estimated or projected budget for these activities. Comparing your actual outcomes to the original plan is critical to keeping track of identifying issues and barriers to implementation.

And the other tool that I'm a big fan of is just visualizing your progress. This is just a very simple Gantt chart. There are software tools that you can use. Microsoft Project probably overly complex and there's some other simple drawing tools or you can just use Microsoft Excel that highlights key milestones, activities, and shows how those activities relate to each other, more or less the continuum of completing one activity before you begin another. Typically, we find these helpful in illustrating progress and identifying issues by comparing your technical accomplishments to your planned schedule.

So in general, sort of an overview on risk assessment. It boils down to aligning your technical progress with your implementation schedule and budget. Regularly comparing and aligning these three project elements should help identify issues before they become problems. So now, I'm going to turn it over to Erika who will provide a few tips on sustainability planning. Erika?

MS. HUMPHREY: Thank you. So one of the things that we want to focus on – next slide – is incorporating sustainability early in your grant period. So you're thinking, OK. Well, we just got started, but too often sustainability plans are ignored until your last six to eight months of your grant cycle.

So we really wanted to bring up starting to plan for sustainability now because, especially in year one, you can begin to assess your elements of your program and then evaluate what elements are actually working, which ones aren't working, and that way you can partner up with your stakeholders and really look at your plan now by putting it together and then periodically looking at the plan and seeing what's working, what's not, and just keeping a note of that. Next slide.

So here are just a few tips that you can focus on for year one. So having conversations early with your partners and then sharing your goals for sustainability and then hearing through your communication with them what are their sustainability as well and do those areas match. Also, think about the best way to involve your partners early and make the most of the resources they may offer and then as well as keep track of what funding may be available from both local and national foundations as well as from the state and federal level because, ultimately, when the grant ends, you really want the best part of your program to sustain itself. Thank you. Next slide.

And just a couple more tips. Just one of the key things and that we'll be talking more of is just really highlighting program successes within your community as well as in the media because, when people know about what you're doing, they're definitely want to jump on board and help you to sustain those programs as well. And then as you move into year two begin to identify what resources are needed to start to sustain your project.

And so we provided a link for you at www.doleta.gov, and if you were able just to hit that link, it goes straight into a sustainability guide. And a lot of grantees have used this particular guide early on, and they used this guide with their partners where they actually sat down and put goals together and, again, quarterly looked at their sustainability plan and to look at what's working, what's not working, what things should we be adding. So again, we just really wanted to highlight early on start to think about sustainability early. Next slide.

And so as we're getting to the end of the webinar – and again, we gave a lot of information, and, again, some of this information is new to some grantees who this is their first grant. Others, again, this is a refresher, but we really wanted to make sure that everyone is set up for success. And so there may be questions that came to you, and we'd really like you to put those questions in the chat box, or you can also share at this time how you're leveraging your partnership.

So it's a good time to do some peer-to-peer sharing as well. So we'll give you a minute or two to enter your questions, or, again, you can share some of your strategies that have been working with you as it relates to staffing, leveraging partnerships, how you are measuring progress.

MS. CASERTANO: And while we wait for questions to come in, I just want to remind everyone how you can view the recording, the transcript, and the PowerPoint on WorkforceGPS in about two business days. I just want to remind everyone about the survey that's going to be sent out right after today's presentation. I want to remind everyone to answer that survey. Also, if you want to download that handout or the PowerPoint, you can do so from the bottom left-hand corner of the screen, but also you can download it from WorkforceGPS.

MS. HUMPHREY: OK. We have no questions. We want to move to our last slide, and that's going to be a polling question. And so one of the things that we'd like to find out from you, what TA topics would you like to see featured in the near future? We have supportive services, partnership development, outreach and recruitment, participant retention, or other. And if it's that other, please specify in the chat box. Our goal is to make sure we're meeting your needs.

OK. Looks like supportive services. That's great because we do have a webinar in the near future on supportive services as well as partnership development. In August we will have one on outreach and recruitment. And I see a lot with participant retention, and that's probably because you've already started enrolling your participants. So yes. It's definitely a good time to talk about that as well. Thank you. Thank you for participating in this poll. This really assists us from your TA team.

And then we're going to, again, look at some of the upcoming TA activities. Again, in August we're going to be doing a participant outreach and recruitment. And then September we're going to have an integrated supportive services and that's going to be a peer-to-peer chat and that's where your peers will be able to share how they are integrating their supportive services.

And then we're going to in September have a webinar on building strategic employer partnerships for career pathways in the community and the region. Next slide.

We just wanted to once again, as always, share the America's Promise mailbox, and that's AmericasPromise@dol.gov. And any time that you do send a request or you have a comment, we do ask that you copy your FPO. We want to make sure that they are aware as well.

And again, if there are no further questions, we'd like to thank you for participating in our first webinar, and, again, there will be many webinars as well. Great. Thank you so much for participating.

(END)