**WorkforceGPS**

**Transcript of Webinar**

**Promising Practices for Increasing Certificate & Credentialing Outcomes**

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LAURA CASERTANO: And we are asking you – again, if you haven't done so already, we're going to start this off by asking each of you to let us know who is on today's call.

So I brought that poll up, and we're going to ask you all to select a role that you play in your H-1B Ready to Work grant. So for this grant – so for this initiative I am the, and then you let us know either the authorized representative, program director or manager, IT data manager or staff, training partner, employer partner, or service provider. So we have the poll up on the screen now. If you haven't done so already, let us know. Select your answer in that poll.

And it looks like, for the most part, we have mainly service providers on the call, and that's great. A couple – we also have some program director/managers. Again, if you haven't filled in that poll yet, take a second now and do that. I'll give you another couple seconds, and then we're going to introduce our moderator today. All right. I'm going to take this poll down so we can get things started.

I'm going to turn things over to your moderator today, Monica Evans. She's a workforce analyst with the H-1B grants with the U.S. Department of Labor, Employment and Training Administration. Monica, take it away.

MONICA EVANS: Thank you. Good afternoon, everyone. Again, my name is Monica Evans. I am the program lead for the Ready to Work grant program. Welcome to today's webinar. We really have a very informative webinar for you. So I hope that you are paying attention and ready to ask questions either online or in the chat.

I will now turn things over to your presenter, Tressa Dorsey of TAD Grants. Tressa?

TRESSA DORSEY: Thanks, Monica. I appreciate that. Yeah. I'm very excited to be here to have this conversation with everybody today. I think it's something that most of you on the line, based on how many we have logged in, it seems to be a very relevant and pertinent topic to the programs that you're running across the country. And I see a lot of familiar names popping up on the screen. So hello to everyone.

As Monica said, my name is Tressa Dorsey. I'm the president of TAD Grants, and today my colleague, Erika Humphrey with the H-1B Ready to Work technical assistance team from High Impact Partners, is going to be helping me along the way, and she is going to really be shepherding me through this process. So I appreciate that. Erika, you want to say hi and introduce yourself?

ERIKA HUMPHREY: Hello, everyone. This is Erika Humphrey, the coach for several of the grantees, and I'll be supporting Tressa today.

MS. DORSEY: Awesome. And thank goodness for that because we all need a little support. So I appreciate that. So here's what we're going to do. We're going to kind of get going, and I want to just preface everything by I think really focusing on the fact that we can appreciate that webinars can be very difficult to pay attention to for an hour span.

We've got a lot going on, but I guarantee that, if you can set aside the cell phones and maybe turn off some of those notifications, that you will most likely get a couple of good quality wisdom nuggets, we hope, out of today's webinar.

This is something that's really been across the board. I would say – I'm not going to say it's a problem or a major challenge, but it is part of looking at how we design our programs and how we can make those changes to our program design in order to more effectively serve jobseekers and essentially meet our performance outcomes.

And so with that being said, I'm just going to kind of launch into what we're really going to be talking about today. And I've broken this down, for the sake of time, into three really simple objectives, and those are, first, what's really the root cause and what is causing the challenge that we're experiencing when we see individuals who maybe are completing and not earning their credential or their certification?

What does that really look like, and how do we really track that down? And I think the big thing that I'm going to focus on with that is really looking at how did we even analyze this information to figure out what might be going on in the program design.

So whenever we look at data as an industry, as a workforce industry, what we have to start paying attention to I think in order for us to understand root causes is, what does the data mean when we have individuals that we're entering into credential attainment programs and maybe we have 100 that complete but we have 120 – or we have 100 that complete but maybe we only have maybe 50 or 60 that are earning that certification or credential?

And so a lot of the times it's easy to say, well, it's happening at this point in time once they complete, and that's what's causing the challenge. And based on the experience that I've been fortunate to have over the last – I won't tell you how long I've been doing this work because it does date me, but I will tell you that it's been my experience that across the country those outcomes are not – they're really indicative of something that's going on long before we get to the point of completion.

And so in order for us to really look at that data and use it to our fullest advantage to understand what's going on, we have to really say to ourselves, at what point in time do we think this person was going to be in a position where they weren't going to get their credential? And oftentimes, that happens from the beginning of their program process.

The second piece to what we're going to discuss today is really looking at what are some possible solutions, and these solutions are coming from best practices across the country. Through my work through TAACCCT grants and the ability to go out and work with workforce boards that operate multiple programs under the WIOA umbrella, so to speak, and different discretionary grants, what we've seen is that there's some solutions that really require the competence and skill level of the individual who's responsible for those things like partnership building and case management, documentation.

Really need to look at, are we doing that to the best of our ability? What part of the system can we change, if any? And really looking at kind of some of those solutions.

And then the last thing that I think is often the most important piece is really looking at so we know what the – we know what the cause is. We know what the solution might be. But now what? How do we actually implement some strategies and go back? And hopefully, some of you will be writing some of this down and saying, you know what, that's a great strategy. I need to implement that in my program.

And if it is and you're a note-taker, please write it down because, if you're like me, you're going to get off this webinar and then your day's going to take you away and you're going to get e-mails and phone calls and life will get busy again and you'll most likely forget because that's what I tend to do a lot.

So I like to write things down because, if I hear it and write it down, it means I'm going to follow through with maybe doing something to change it. And so the last piece is really going to be talking about how do we actually move into action with some of these solutions, and what are those steps that we can take in our individual programs?

So that's essentially the agenda for the day. And now, my good friend Erika will walk us through this polling question.

MS. HUMPHREY: Great. So our first poll – and we want everyone to vote, and it states, do any of the current educational training programs offer participants the opportunity to gain their credential or certification at time of course completion? So is that none, some, all, or I don't know? OK. I see that some are saying all. OK. Some I have. OK. So 50/50 there. OK. One says, I don't know. OK. So again, strong some that we have. OK. Tressa, what we're seeing is that –

MS. DORSEY: Interesting.

MS. HUMPHREY: Yes. It's interesting, Tressa. What we're seeing is that a large group stated that some.

MS. DORSEY: Yeah. I see that, and I think that that's an important thing because, if we have about 63 percent of the folks that voted on this that have the ability to vote saying some, right there I think we're already kind of getting into some of the common causes that we may see. And I think this will lead in nicely, Erika, to what we're going to talk about next, which is the common causes for maybe why some of our folks are completing and not earning their credential in the time frame that we would like or at all; right?

So thank you for that poll. I appreciate that. That's very enlightening for me moving forward, and it was as I suspected. I mean, I'm very familiar with most of these programs. So I can – I understand a lot of the program designs, and it's not surprising by any means. And also for those of you on the line that are not Ready to Work specific, this is something that we see across the country for different programs, regardless of population being served or the actual outcomes that we expect.

So let's really get into what some of the common causes are, and I think that the way that I really thought about this was let's start at the basics and kind of move on to some of the more challenging areas of what some of these causes are.

And so really I think the very first thing that we all want to check – and this is just being good program managers and directors, is let's look at our data entry and our documentation. Is the data being entered properly and with a frequency that would allow us to make any changes or track down the source of the problem prior to it becoming something that is – I wouldn't say unfixable but certainly a lot more work to fix?

And what I mean by that is a lot of the grantees that I've worked with over the years, when we're seeing a larger discrepancy than maybe they think – maybe they're like, well, gosh, I feel like we're getting more credentials than that. That's usually – if you're questioning that, that's usually an indicator that you might need to go back into that data entry and documentation piece of what you're doing and talking with partners and folks and really taking a deep dive into, are we entering it in a timely manner and are we entering it properly? So that's kind of number one cause.

The second piece is around the case management and follow up component. Case managers oftentimes are – they're strapped for time. They've got a lot of folks coming in. We've got to meet our outcomes. So we've got intakes and moments, orientations happening. They're a dual – if they do the dual customer approach, maybe they're the case manager one day and they're doing business services the next.

And so in that shuffle what tends to happen and we need to look at this is, are we really effectively building strong relationships with our participants to where we have built the trust and the respect and the understanding of our participants? And that's in the beginning to where, when we see that they may not end up getting a credential at the time we anticipated, that we're able to have those conversations and adjust along their time frame and start looking at how that relates to their action plan.

I think the other piece about the case management process that I would say you might want to focus on for a common cause is, are use using the assessments that we have thoroughly enough to be guiding them properly in their career path? Career development is a very, very big issue for some of our folks. Some they don't know where they're going. They've never done the work. They're not quite sure.

And we do all use assessments in our programs, but are our case managers skilled enough and knowledgeable enough to really deliver that information in a meaningful way to our participants from day one to where they can help them along their career development path and say, hey, this is what the assessment means and this is how we can implement some of that information to help you make the best choice? And the reason why assessments are important is because it's essentially the whole basis of your work with them. It's what gives us our foundation.

The last thing around the case management piece for common causes is that we need to look at our follow up. How often are we following up? Is there a policy around when and how we follow up and who follows up? And really looking at I would say that follow-up process as a whole.

And we see follow up being more of a struggle, I think, with folks that are intaking lots of people at once and people are going into different training tracks. And so it is a little difficult to keep up on those things, and I think as a basic rule a follow-up policy that's in effect along with some good skills around organization and calendaring tend to help.

The third cause here is really about looking at your program design. Now, if you're like – experience the things that I've experienced in my time in the work is you get a grant writer on board, somebody great, and you go, great. They developed this wonderful experience and this grant gets awarded and the program design is flawless. And then a year into it maybe we aren't hitting those marks. We aren't necessarily following the design that the grant writer wrote and that everybody agreed to.

And so we really have to look at what's going on in our design, and do we need to make those changes? And because we are limited on time with so many of these grants, there – you can't wait two years in in order to really look at that program design and do that ongoing evaluation, which I'm sure most of you do or I'm hoping that you do. But ultimately, we want to look at are – simple questions that you might want to ask yourself.

Are more participants entering into a training or education activity that will lead to a credential? Meaning, are we putting people in OJT and internships, which is great and we're marking them as being in a training program, but they're not going to lead to the credential, which ultimately means you're not going to necessarily have that credential attainment outcome noted in your data; right? So you're leading them on their way, for sure.

You're utilizing everything that you've got. You've got your on-the-job training. You've got your internships. But if a majority of people are only getting placed in that, then there's no doubt about why we're not getting any certification or credential attainment out of those activities. And so we need to look back at the program design and make sure that it's happening in the way that we intended or at least as close to possible when we originally wrote for and received the grant from the Department of Labor.

The next piece here is the partnership challenges, and again, I know that these are ongoing challenges for everybody, not just having strong collaborative partnerships but maintaining those over the course of a three- to five-year period, depending on the length of your grant. But essentially, partnerships in this case for the common causes, are we really bringing them to the table and asking them to look at the curriculum on an ongoing basis?

Do we have the ability to work with our partners because they are true partners and not just partners on paper where, if we are having a challenge with them having an integrated credentialing attainment piece in their coursework, would those partners really be able to work with us to change some of those components so we can make it a little less cumbersome for the participant to get through the process and essentially gain that credential? And those are conversations we're going to talk about in the solutions and the strategy space here in just a little bit.

The next piece of it is looking at the – and going back a little bit, but this also has to do with partnership. When you look at program design for partnerships, essentially what you have to ask yourself is, are we scheduling our cohorts to complete in a time frame that is consistent with the testing that needs to occur? And so as an example – I'm an examples person. So as an example, if you know that you're running a cohort and they're going to be done in 12 weeks but the very first time that they can actually test to get their credential or certification isn't – is going to be a month, three months from now, are we scheduling these things properly?

And if not, are we engaging our partners in that conversation about how we can change the scheduling of those cohorts to complete in a closer time frame? And those are the types of conversations that I think really lead to changing some of that program design, but scheduling is a very important piece in that, again, if you're very much like me, I may learn something today and in a month from now I will need a full on refresher course because I've taken on so much more information since then or I've had other things go on that I've not quite mastered it.

And so what that really will lead to, if you schedule things in that way, is extra work on your program side to provide the tutoring, but it's also a challenge because you have to continue to keep them engaged during that wait time between the end of their course and the testing period. And so we need to look at that from a program design perspective.

The last thing is our employer partners, and I've found that we struggle across the board with our employer partners at times, not just for the sake of getting people credentialed but how – but also just in general, how to get people placed, internships, on-the-job trainings, getting people to buy into that.

It is a challenge across the board, but when a participant gains employment prior to completing their credential, which I know has been a challenge for some of at least the grantees that I've worked with with Ready to Work, really that's when that effective case management piece really comes into play because, if we have an effective case management system, we're going to be doing that engagement.

But I would say in general, when they gain employment before their credential is earned, this is where the engagement of the employer ahead of time is very important because there's some specific things that we can ask of them as partners to help us in those efforts to make sure that they not just get employed but they actually meet their goal and get that credential.

Because, while the employer you currently are on board with may not require it because you're already working there, that's not to say that down the road in your career path that credential is still not going to be important or important for that employer, if they would like to move you up, which is where we get our increased wages and our promotions and things like that. So employer engagement is also I think a common cause for some of the reasons why we see our data looking the way that it does.

So those are just a quick rundown of some of the common causes, and I think it's a good time right now if – I have another question for you, and, Erika, what's that question?

MS. HUMPHREY: Great. Before we have the poll, we wanted just to ask just quickly, based on all of the great information that you shared about common causes, were there any follow-up that anyone wanted to ask Tressa because what we want, everyone, we want this to be an interactive call.

So we're not going to wait until the very end for all the questions. If you have a question that just really comes up, we want you to be able to ask that question. So we want to just take a pause for a moment to see if there were any questions or follow up that you had for Tressa in reference to any of these common causes or any of these common causes you are finding within your program. And you can dial \*6, and that will take you off of mute.

All right. We'll go to our next poll.

Q: Oh, I'm sorry. Can I interrupt?

MS. HUMPHREY: Yes.

Q: It's – I apologize. I was still on mute. It's Lauren Lee from city of Providence. I had a question about one of the challenges we're facing is that some of the trainings don't actually include a nationally-recognized certification. I'm wondering if anybody is finding that as well, and are you able to use the certificate of completion, if it subsequently helps the participant become employed and it was necessary for the position that they got?

MS. DORSEY: That's a great question, and I think that that's probably going to be fielded best by somebody at the Department because I think it has to do more so with the statement of work and what's required under the grant. So if anybody has any information on that that they'd like to share, and they might be on mute.

Q: I was hoping that didn't mean no one.

MS. EVANS: So I guess the – I thought the question – and please correct me, if I'm wrong, but I thought the question was more so what were some of the other grantees' experiences with getting that credential and getting employment for those participants with the certificate of completion. Is that what you were asking or –

Q: I was asking kind of do other grantees have those type of trainings that don't necessarily result in a nationally-recognized certification? And have you been able to use those certificates of completion? Can you enter that as a credential, if somebody's just taking a class that that's all it entails? Or do you then guide people just to the trainings that have a credential attached? It's kind of a conundrum for us.

MS. EVANS: OK.

MS. HUMPHREY: It looks like Kelly Meeks says, yes. She's experienced that as well. We've got a few other people typing right now that probably can answer your question. So just give them a few seconds there.

Q: Yeah. I really appreciate any feedback anybody's got.

MS. DORSEY: I can probably offer you some that's not very technical. Eileen, thank you for saying that. Denver – (inaudible), she says, we use both, and Los Angeles only trains with credentials are attached. So thank you for that feedback. We've got more coming in, but what we've seen, at least my experience has been, this is where we start getting into conversations around stackable credentials and looking at what can you earn that will get you to the next step?

And so while some of these trainings may not have something that's nationally-recognized, they may be industry-recognized. And so trying to look at how do we effectively build upon that certification.

Now, as far as entering it and what is required by the department, that's – I can't speak to that, but I can tell you that, for the most part, what I've seen is that there are opportunities for people to gain certifications that will be acknowledged by employers in the area that will help them move to the next phase of their career path and that that is helpful.

But – and so I don't know if that's helpful, but I think that in some ways we have to – sometimes we're not going to just get the credential that we want right away and that there's going to be steps along the way, much like when you see a bachelor's or master's level course. Yes. You may spend four to possibly even eight years, depending on how fast your path is, but within those two years you may see that you're gaining certifications that are industry-recognized that will allow you to get those wage gains and then you continue to build upon that until you get your actual degree.

Q: Thank you. That's really helpful. Just as a follow-up question, so when you want to document that those are industry-recognized credentials, are you using your industry partners to do that or local employers?

MS. DORSEY: Typically speaking, what I've seen from the other workforce boards across the country is that they, essentially – because one of the struggles that I think people have in general is understanding that there are certain aspects of credentialing where, if there's not an actual credential – if there is no credentialing body, meaning there is really nobody else to sign off on this, there is no place to go to ask them to give it the blessing that you need to make it nationally-recognized, what I would probably use is a cross of your employer association that would be the foremost experts in the field and let you know, yes, this is something that is used and recognized in our industry, whether you're in Utah or Wisconsin or New York, and this is – that we as an association acknowledge this as being qualifying – a qualifying factor for somebody to do the work.

I think that that's when you really engage employer partners but also the associations that you might be engaged with to get them to help you out with some of those criteria that they're looking for and something that the industry itself would recognize.

And I know that that really comes from, again, that partnership piece of being at the table when these discussions are happening and engaging them in a way that maybe we don't often do because what we're really just looking for is will you place my person versus, well, I need you to inform what we're doing. You know what I mean? So I would say in general that would be good.

And then just to – again, it looks like we have some same issues in Texas. We've been able to use the certificate of completion, if the credential is not given and also if they are unable to stack on these certificates unless they go on to postsecondary. Right. That's true. That's true, Kelly. That was from Kelly Meeks. But then we are unable to stack on these certificates.

So I think that it's going to be a combination of looking at your partnerships and asking your employer associations in the different industries. And I'm going to just preface that by saying, sometimes that means that you might not have an association representative within your own community, but that doesn't mean that you can't reach out to a national body.

And I'll give – like a home builder's association that's – that is national, that it is recognized, and that you can get some other feedback maybe even from a neighboring state's association. I think that those are all really good ways of trying to figure out if what you're doing would constitute somebody getting into that particular career path and actually moving forward in it.

Q: Great. Thank you so much. I appreciate that.

MS. DORSEY: For sure.

MS. HUMPHREY: Elaine, I know that – Elaine, I know that you're on and you're typing. I don't know if you can hit \*6 and share what Denver's actually doing that might help as well some of the other grantees. Elaine may be on the actual computer, but she's going to type because I know they – with their TEC-P program, they use both. Can you elaborate a little bit, Elaine?

MS. DORSEY: I think she's typing. So hopefully –

MS. HUMPHREY: Yeah.

MS. DORSEY: – that will be good.

MS. : Go to the polling question.

MS. HUMPHREY: But in the meantime, while Elaine is typing, we can go ahead to the polling question. How often do you convene your partners and review curriculum and course design? So will that be once a month, once a quarter, once per year, have not done this yet, or I don't know?

MS. DORSEY: And I want to actually clarify that question. I don't mean in formal meetings where you talk to your partners about things or – I mean a formalized, we sit down once a quarter, once a year, and we go through the whole process. We review everything together. There's an agenda. There's an action plan that comes from that to make any changes. Just to get a sense of how informal is this.

MS. HUMPHREY: Great. We see some saying once a year. Have not done this yet. OK – which is OK. Once per quarter. OK. Once per month.

MS. DORSEY: I like that. That's –

MS. HUMPHREY: Yeah. So it looks like evened out a little bit where we have several saying they're not sure, haven't done this yet, once per quarter, once a year, and just one person saying once per month.

MS. DORSEY: That's great. Yeah.

And I think Elaine is writing back in also, Erika. It looks like she said, "Training providers are automatically provided certificates once they complete the training. However, they will also have an opportunity to take professional industry, such as PMP and the PMI or Pearson VUE. Denver we do once a month in case customers change training plans."

OK. Great. So it sounds like they've figured out a little combination in Denver which might work. So they do get a completion certificate, but then they also get the opportunity, it sounds like, later on to actually take the credential. So that's good. Thank you, Elaine, for typing that in. It's appreciated.

Yeah. These – so here's the poll results, and here's one thing I want – because we have some – it looks like we kind of have about 30 percent of folks are once a quarter. 23 percent are once a year. I think that in general as a good practice – and I think Elaine spoke to it when she said, Denver we actually look at the is once a month in case the customer changes the training plan.

Again, we're up against a little bit of a clock, and so if you wait for once a year, by the time you get around to making changes, it could be a year and three months, a year and four months; right? And so we have to look at how often we're doing that because it seems as though, with the time frame that we're given, the more often we do it, like those folks that are doing it once a quarter maybe or even once a month, they're able to adapt some of that for the next cohort going in and make that process a little bit more streamlined and we're able to do it more quickly.

And so just as a recommended strategy, I would say convene those meetings – formal meetings at least once a quarter so you can make those changes quick – sooner rather than later because by the time we get the data that it's probably not working out the way we wanted it to, oftentimes it's a lot longer – somebody's been done and now they're out of the program and we might be having a difficult time tracking them and those types of things. So I would say that in general that strategy would be the more often the better.

And I think we have everybody good on the poll. So we can move forward to the next piece of that. Thank you, Erika, for putting that up there. I appreciate it.

So here is the thing. So we are all really familiar with the common causes. I think most of us who have been doing the work for a long time tend to really identify those challenges quickly. But really it's about getting into the solution of it. And so what I want to look at is just five key areas where I think solutions can really be found.

And the first thing is are case managers – and I talked about this in the beginning. Are we designing things to where the case managers can actually build that effective strong relationship with their participants from the beginning? If you can – a good solution to that is looking at your orientation and intake process and looking at that assessment piece. Are they being utilized properly? Do all of your case managers understand what the information they get from an assessment is, how to apply it, and how that best helps the jobseeker?

And I can tell you we actually just did – I just did a full week on assessment training, and it was really eye-opening when we asked – I think we had about 140 people over the course of a week and we asked them, how many of you have personally taken this assessment? And it was really surprising that less than half of those individuals had actually one through and walked through the assessment themselves. And what would tell me is, just like any of us, how can I possibly understand what this means for you if I really – I've never done it myself?

I've never walked through the process. I don't know how intensive it is. I don't really understand what the information meant or how that information was gathered. And so I would say as part of the effective case management process, looking at that assessment and making sure that your case management staff knows exactly what that participant has to answer, how did we get the results that we did, and then, most importantly, making sure that they understand that that assessment is now the basis of that career development plan or your individual development plan, IFP, ISS. We have a million acronyms. I'm not sure what you all call it. It's probably something different at each site, but whatever that is, making sure that they understand the foundation of that.

The other piece to it is looking at that documentation and data entry. Review your data and conduct a case audit and ensure all information has been captured and entered. And I recommend this, honestly, on a monthly basis, if you're not already doing it. My experience has been by the time – especially for you folks that might be managing multiple subcontractors who say it's fine, just give me your data once a quarter, by the time they give you the data for the quarter, it's three or four months old because by the time you turn it into DOL it's even longer now.

And so, again, this is that we're up against the clock. We need to know in the moment if things aren't being entered properly. And so I think that it's about the frequency in which we do those case audits and look at not just our data but is everything being captured and entered correctly.

The other thing that you might want to look at as well is are your databases communicating with the databases that are available at DOL, the HUB system or your MIS system, whichever one that is? We've seen some miscommunications there because we all kind of got to build our own, and then we had to integrate them.

And so that upload process, though, may be something a little bit off. And so that's for – I notice there were some data managers on the call today. That's definitely something that I'm sure you look at on a regular basis, but we want to make sure that we're doing that across the board and just double checking those simple things. The solution part of that is just really doing it on a regular basis and increasing your frequency.

For the partnerships aspect of the solutions, again, this is about conducting partnership meetings ASAP, and I think we saw from our last poll making sure that those partner meetings are formalized, that – because I always had an expression that people that – any time somebody said I was in a meeting, it was just an excuse to kind of – it's like, oh, well, we're not really working; we're in a meeting. And then there was never anything that really took place after that and then we'd come back to the same meeting a week later and we'd have the same conversation. We'd all talk about the same thing.

And so in an effort to be really efficient with our time and I think feel more successful in our own individual roles as well as our program overall, when we schedule partner meetings, engaging them on a regular basis, I often believe that it's – once a quarter is great, but for those partners that are a pretty integral piece to getting people from point A to credential, I would recommend that on at least a monthly basis to be doing check-ins and also – so again, increasing your frequency of communication and utilizing technology for that can be one of the ways that we kind of circumvent some of the scheduling problems where people can't get to a site or they've got another meeting right behind it.

And so from a calendaring perspective, use technology to your advantage when you can and do – I don't know if people still use Skype or Hangout or whatever the Go To Meeting is but some way that you can all kind of be in a shared space would be good.

And I think the biggest thing is, again, formalized agenda and making sure that there is an action plan when you leave for each person to have a designated role in what those paths will be to be completed in order to improve the outcomes of the overall project. So just not having a meeting for the sake of having a meeting to say that we did it but really getting some good, strong action out of that and then being able to go back and really follow up and say, did we accomplish what we set out to do the last meeting?

The next one, the next bullet here is about integrated credentialing. And integrating the credential attainment into the education and training program itself ensures that a completion of the program really not just they complete the program, but it means that they'll actually attain the credential.

And so whenever possible, look for opportunities to ensure that when the person is done with their program, that there is that credential or certificate attached to it, not where you wait three months to take the test and then maybe they'll get the credential at that point, but really looking at those time frames.

And are there other opportunities, like we discussed earlier, to integrate other certifications or other learning opportunities that would be recognized by the industry and the employers to say, yes, that person's completed those specific competencies and, therefore, they're eligible for this opportunity? I think that any time somebody's learning things through a process, that the more that they can earn during that period of time as far as I've gotten this certification and now my next certification is going to be in a month from now, but making sure that it's integrated.

I think that when we set up a design where somebody completes a course and they don't get the benefit of it, meaning they don't get that credential, that, essentially, we are setting it up to say, so I did all this work and I'm no better off for it. And then you're going to have a real hard time continuing to engage them because they don't see how their efforts really paid off or how that time that they spent in that course really paid off for them.

And so it's a multi-faceted thing, but in general, making sure that the certification or credentialing is actually integrated within the program to where they both end and are earned at the same time, whenever possible. And again, that's going to include – that's really going to be dependent upon that strong partnership because they're going to have to agree to that and somehow design their curriculum to ensure that that works. I know in not every case that's going to happen because of the way that testing is, but we talked about a possible solution being scheduling of the cohort to coincide with the time frames that the testing is available.

The last thing, obviously, is the employer inclusion. So get your employer partners on board day one. They should be at the table. Ask them if they're able to do things like adding a credential attainment into their internship or OJT plan. If you have a true working relationship with a business and you haven't just simply placed somebody but you're really integrated into what their growth plan is and you're saying, hey, it would be really great.

We want Johnny to get his credential, but he's also going to go into this OJT. Could you or would you entertain the idea of maybe attaching a wage increase or a full-time position into this training opportunity for them to where we're still encouraging them to get that credential but they can remain employed with you? Ask them if that's something that they would consider.

Most of the time employers do see it as a benefit if somebody is credentialed or certified versus just taking them for the internship or OJT opportunity. I always say you should integrate the credentialing into their internship plan or their OJT plan because they should be applying the knowledge they're learning in the coursework, but again, this is where that employer partnership and that conversation needs to happen even ahead of time, meaning don't do it while they're already in the internship but talk to them about what they could to work with you, with the understanding that this is all, essentially, in their best interest as well.

So they should be at the table when you're talking with your training providers to discuss how they can support the skills and – that are being learned in the classroom as well and explain to the training providers as your partners, this is what we're looking for, but this is what we would need from a credentialing perspective in order for us to move them up our own – let's say our own chain; right? So I just think that they need to be more present in those conversations with our training partners in order to get the best result possible for our participants.

So those are quickly some of the solutions, and I want to open it up and just make sure, if anybody has any questions about any of the solutions or if you've had a best practice that you can share on any of those five bullets, please share them.

At the end of the day this webinar is about you all having the opportunity to share and learn and ask the questions now for any challenges that you might be having. Remember to hit \*6 to unmute your phone line. Please do that or type into the box – into the chat box. That would be great. Excuse me. And in the meantime, I think Erika has another polling question for us.

MS. HUMPHREY: Yes. I do. So, grantees, how often do you follow up with a participant who has not obtained their credential? Is that once a week, once per month, once per quarter, or at this time you don't know? OK. I see several grantees saying once per month.

MS. DORSEY: Yeah. Looks like we have one that's coming in at once per week.

MS. HUMPHREY: Right.

MS. DORSEY: Good. Good.

MS. HUMPHREY: And a couple saying per quarter.

MS. DORSEY: (Inaudible). Let's see. Progress. Good. Looks like we have a couple folks typing in here maybe to answer the question. So that's good. Yeah. These poll results, I mean, this is good. We have several that are doing once a week, which I'm a huge fan of. I think that when somebody's completed, it's important that we stay there, we stay present with them, that we don't – the longer we go without contact, the longer they might be without a check, the longer their life stresses is starting to build.

They've completed something and maybe they're not working or maybe they are working but they feel very comfortable in that spot. And so I think that the more – again, more frequency in that case management process and looking at that follow-up time, how can we really continue to encourage our participants to keep going and meet their objectives and their goals that they set out in that – in the development plan that we did when they first got in the program?

So I love that we're seeing once a week on there, once a month. Once a quarter I think is probably not frequent enough. You got some folks that I would say – I would recommend that, again, the more frequency the better. It looks like we have some folks here that are chiming in, which I appreciate.

Depending on the participant, some need it weekly and/or monthly. It's a time issue. Once a month is all I have time for. I totally understand that. So it looks like we have a lot of folks saying it's really dependent upon the participant and/or the time that we really have, and so I appreciate that. And it looks like we have a couple more coming in. Yeah. Overall, it looks like a majority of the folks are once per month.

And Elaine is saying from Denver here is that they work closely with the training providers to issue their certificate. We don't hear from the customer. Oh, that's great. That's a really good strategy there too; right? If for some reason the customer is not engaged any longer and doesn't want to provide you the proof of certification, I think that that's great that you work directly with the training providers to offer you that information.

So again, that demonstrates great partnership, information exchange, a willingness to share that information so you can document it properly. So that's a really great strategy as well. Thank you, Elaine, for that. Excellent. So I think we're good with that poll, and now, we're going to clip right along.

So now, we're going to be moving into the actual strategies piece of this, and you'll notice I probably streamlined some of the strategies and the solutions into this piece of it when I was talking about – sometimes strategies and solutions seems to be very integrated, and it's a little bit difficult to separate them.

But what I want to do is really talk about this case management documentation training, and I wish that I was in a room with you all right now because what I always love to ask people when I'm in a person-to-person, face-to-face training is, how many of us went to school to become a workforce development professional?

And usually, we get a big laugh because, as many of you know, I think just most recently there might be one postsecondary education course in this, and most of us didn't choose it. We probably came to it by way of other professions and things like that. And so what that essentially means is is that one day we were probably looking for a job, and then the next day we were on the other side of the table being told we're going to help you with a job.

 And I think what's important for us to look at is that there is a required training component that comes along with all industries, and workforce happens to be one of the only industries where we tell everybody else how important training is but, oftentimes, we overlook the importance of training our own staff to get the skills and competence that they require to best serve our customers.

And so whether it's internal or external – right – training, all professionals require some form of continued education training. It should be an ongoing practice with a schedule, and those that require extra assistance may receive more training than others. But most likely, again, our staff didn't go to school for this work. I know I – this wasn't – I was a major in criminal justice. I didn't start paying attention to credentialing in workforce until a few years ago, and then I needed to make sure that I was up on things.

And so even in the owning my own business and being a trainer all across the country, I still educate myself on things and gain certifications because, without that, we essentially continue to move people through a process that maybe we don't have all of the skills and competencies necessary to do so.

And so I would just say that, looking at your case management process, one, look at it from the process standpoint in the system, but then look at those individuals that are doing the work, that are on the frontlines, and make sure that we're doing everything that we can to support them to really effectively use those assessments, effectively develop a career plan, effectively do the follow-up process. I think that that's a big thing.

Make sure that they're getting that documentation training. Again, you might have trained them in the beginning of the grant, but if it's been a year, two years, three years, six months sometimes, people forget things, and maybe they're on multiple grant projects and everybody gets things documented differently.

We have to continue to reinforce what they've learned to ensure that we're being as effective as we can and that we are – that when people are walking in the door – and I can't say this enough.

When somebody walks in the door thinking that you're the subject matter expert, that you're the expert in this field and you are there to help them, that we hope that we meet those standards, that we want to make sure that they're making the best possible choice and that the quality of service they get is not dependent upon the luck of the draw of the case manager they were assigned.

And that's about standardizing the skillset across the board, regardless of who you are or how long you've been in the system.

The next thing is that case auditing piece. I would say that auditing files can really trigger a training opportunity, but also conducting these on a monthly basis will ensure that your documentation and your data entry issues are addressed in a timely manner.

I would say, if somebody's making a mistake or you notice that there's repeated mistakes by one individual or they're unable to follow up with their participants, these are all indicators through that case audit that either that person requires some additional training or you need to look at the system and your policies surrounding how we enter case notes and documentation, how we enter outcomes, and then also how we ensure that people are moving forward through our actual system and that those design flaws can be really addressed again in a timely manner. I think that's probably what the most important piece is.

Transition planning. I will tell you that a good strategy is is that, if we assume that the person walked in the door, we did what we had to do with them, they go to a training provider, and they're good and we kind of say, great, they're in training and we're getting the time sheets from the training provider and so we can see that they're still going, that there is a point in time where we need to go back and really look at that and say, OK, you're here; this is where you're going to be in four weeks.

Now, what's the plan look like for the next four weeks? And what that will ensure is that that credential attainment is still very fresh in their mind, that you're updating that. And I can see from some of the feedback that we're getting, we do this on a monthly basis because their training plan might change.

But you'd be surprised at how many transition planning sessions don't happen because meantime you've got new active participants coming in and I saw it on the chat here, we ran out of time. And so the person completes, and then we're kind of saying, OK. Now, we need to catch up with them and figure out whether or not they got their certificate or their credential. So make sure that that transition planning is really first and foremost and that it's put on calendars and schedules and appointments are set with the participant.

Curriculum and schedule review and adjustments. I think that we've talked about that pretty much. I think that we need to not just hold the meeting, but we need to hold the meeting with purpose and we need to make sure that there's always an action plan leaving the room.

If you find yourself walking out of a meeting feeling like you talked about the same thing and like the needle isn't moving, if you find yourself being frustrated by that process or you really evaluate whether or not you're taking responsibility for something and not following through or maybe a partner or something like that, then I always say write it down. Write it down. Formalize it. Send it out in an e-mail. Get responses because we have to – at some point there's some accountability that has to be held in order for us to reach that overall goal – which is our performance outcomes but, ultimately, reaching the goals moving people into a place of success and thriving and being able to be self-supporting.

Lastly, when we look at integrating the credential attainment, I think that's the same exact thing. Requires partnerships, but the last thing I wanted to say that actually isn't on this slide is incentivize it, when possible. I understand that not all of our grants have the ability to necessarily give somebody an incentive for meeting their credential attainment outcome, but I think that any time you can use funds, whether they're approved in your grant or whether they come from other sources, any time you can incentivize a process will help you in multiple ways.

It will help you with the retention aspect. It will help you with following up easier, and it will help you with meeting the overall outcome, which is the perform- – the credential attainment. People are more likely to remain engaged when they know that there is another incentive down the way.

And I think in addition to that, you can also include employers in that conversation where you're letting the participants know prior to the completion of their program, hey, we've got employers right now that are going to be – for instance, they're going to be at this meet-and-greet job fair, and the only way – they have a spot for you, but you got to get this credential.

And so, lastly, just a quick review. We got about three minutes left, and I want to be thoughtful of everybody's time here. Again, review your documentation and data on a regular basis. Don't let it go three months. Don't let it go four months. Have your subcontractors submitting things at least on a monthly basis. Look for tools.

I'm almost positive – and it may be on WorkforceGPS, but I'm not – I'm almost positive it's there but it could not be but there is a performance evaluation tool that I know that we've used in other H-1B projects that essentially was a reporting document that you could do on a monthly basis. And if you do have subcontractors, they can fill that out, and you can monitor that progress almost in real time, allowing you to address the issues sooner rather than later.

You want to develop a staff – it's kind of redundant. Develop a staff development plan, but essentially, it's about professional development. Make sure that the folks on the ground have what they need to be successful in their jobs and help people through the process. If we're not helping them to help other people, then we need to look at what that means for us as an organization and as an industry.

And so I encourage everybody to have a very clear staff development plan and make sure that folks are getting that case management follow-up training, best practices for how to retain people in programs. And obviously, this is part of that staff development, having them sit on webinars and listen to people like me talk about best strategies for doing those things.

We want to engage our partners early and often. Make sure that they're at the table, and we want to make sure that we can get those credential attainment programs. We want that as integrated as possible. We need to make sure those schedules are on track, and then, obviously, we want to make sure that we're engaging those employers and utilizing their support.

Any time we can get an employer to get on board with us and support what we're trying to do, I think that their business wins. I think that our jobseekers win, and I think that, ultimately, our entire kind of infrastructure from our economic development standpoint is a real winner.

So that's our review. I think we have about a minute left. I'm not sure if anybody has any final thoughts on this, but I did want to thank everybody for their time. And I know that we have another slide here where, if you need any further technical assistance, you would be – no. Not that one. You would want to look at some of the upcoming opportunities here.

MS. HUMPHREY: And thanks, Tressa. I'll hand it off from here.

MS. DORSEY: Perfect.

MS. HUMPHREY: So moving forward, Ready to Work, please just be on the lookout for our next webinar, which will be on strategies for job placement and tracking participants through grantee business services. That will be out sometime in May. So please be on the lookout for that.

As a reminder, you can review all the resources that Ready to Work has developed on credentialing and certification outcomes, as well as anything else that you're interested in knowing for your grant program on our H-1B WorkforceGPS Community of Practice. And if you're not familiar with the community of practice and you want to hear any additional feedback on newsletters or blog posts, please sign up as a member on WorkforceGPS. You can do that by logging into WorkforceGPS and clicking the I want updates on the Ready to Work community.

MS. EVANS: Before we finish, I just want to clarify something. Sorry. This is Monica Evans again, program lead of Ready to Work. Just want to make sure that everyone is aware. We did talk about – Tressa, I think you talked a little bit about incentive payments. So we just want to clarify that incentive payments or – are for a very specific purpose, and that is for gathering information regarding employment outcomes.

So you have put in your SGAs or your statements of work how you're going to utilize incentive payment, and we just want to make sure that you're paying attention to what is in the SGA and what was in your statement of work regarding that. So incentive payments – I think there was an FAQ that also has that information on there, and if there's questions about that, we can definitely reissue that.

MS. : And then, [inaudible] said, could we share resources for national recognized credentials and employer industry associations recognized credentials?

MS. HUMPHREY: We can take a look and see if we have some of those. We may have some materials that some of our partners have compiled. So we can definitely take a look and get back with you on that.

MS. : And then, Tressa, we just want to thank you for all the great information that you provided to the grantees. So thank you very much.

MS. DORSEY: Thank you, everybody. I appreciate it.

MS. : Yeah. And if you guys have any additional questions about your grant program, please feel free to contact your TA coach and, of course, if you have any questions about policy and modifications, please reach out to your federal project officer and you can always send an e-mail to the Ready to Work grant e-mail box.

So before we end our call today, we just want to give you guys the opportunity to provide some feedback on this webinar. Laura will be uploading some of our feedback questions here. Kind of let us know how the webinar went, if there was anything in there that you particularly liked, or if there's any follow-up TA that you think you might need to be provided moving forward.

We know that credentialing and certification outcomes is definitely something that you guys want to improve on, and we want to make sure that you reach your attainment goals. So feel free to leave your feedback here, and also, if you do have any comments or concerns, feel free to e-mail the Ready to Work mailbox.

Want to thank you, Tressa, so much for presenting this information to us. It was a wealth of information. We do look forward to developing some sort of resource for you guys following up on what Tressa developed – discussed here on this session.

Thank you so much, Erika, for helping to co-facilitate and, Monica, for moderating. And, Laura, as well, thank you so much for the technical support. And we'd like to thank you all for joining us today, and have a great day.

(END)