**WorkforceGPS**

**Transcript of Webinar**

**Braiding Funds: Yielding Greater Flexibility and Impact**

**Thursday, June 25, 2020**

*Transcript by*

*Noble Transcription Services*

*Menifee, CA*

JON VEHLOW: Welcome to "Strategies and Opportunities for Braiding Funds: Yielding Greater Flexibility and Impact." So without further ado, I'd like to kick things off to our moderator today, Zodie Makonnen, grant lead, Scaling Apprenticeship Through Sector-Based Strategies, Division of Strategic Investments, Employment and Training Administration. Zodie?

ZODIE MAKONNEN: Thank you so much, Jon. Good afternoon, everyone. My name again is Zodie Makonnen. As Jon mentioned, I work in the Division of Strategic Investments and I'm the grant lead for the Scaling Apprenticeship grants. I'd like to welcome you today to our session and I hope you find it informative and engaging.

With me I have Lisa Rice, who'll be facilitating our session today. Lisa is a technical assistance coach with the Manhattan Strategy Group for the Scaling Apprenticeship grants. Lisa comes to this role with over 20 years of workforce experience. She has direct experience obtaining and managing H-1B grants from U.S. DOL in her former role as a workforce board executive director. Additionally, Lisa is a Gallup-certified strengths coach, which she leans on heavily to help grantees achieve their best performance.

I'm going to go now and turn it over to Lisa. Lisa?

LISA RICE: Thank you, Zodie. It's a pleasure to be here today, and let's get going with the rest of our speakers.

We will have Dr. Christine Gillespie, who is the executive director of the division of continuing education and workforce at Bergen Community College in New Jersey with us today. Reporting to the president, Dr. Gillespie identifies and pursues key workforce initiatives, including employer-driven workforce re-entry program, academic pathway development, and public-private partnership. Before her return to higher education, Dr. Gillespie spent over a decade in Latin America and Europe leading domestic and international startup projects in the private sector for Fortune 50 companies. Dr. Gillespie earned her doctorate of education and community college leadership from the Roush Graduate Center at National American University, and received her masters and bachelors degrees from the Pennsylvania State University and Indiana University of Pennsylvania, respectively.

We are have with us today Marcie Murphy, who is the president of CareerSource Brevard, a 501(c)(3) organization established to provide all federally mandated workforce programs in Brevard County, Florida. As president, Ms. Murphy is ultimately responsible for all areas of management, and an operating budget that can range from 7 (million dollars) to $12 million annually. Ms. Murphy joined the staff of CareerSource Brevard in 2002 as the youth programs coordinator; then moved into the role of VP of operations in 2005; and was selected for the role of president in 2016. She is also currently a member of the Workforce Development Council of the U.S. Conference of Mayors. Ms. Murphy holds a bachelor of science and business from Eastern Illinois University. She is leading CareerSource Brevard sector strategy in initiatives such as aerospace, healthcare, and the IT industry.

Oh, my; somehow I just lost my connection. (Crosstalk.)

OK. So Dr. Dug Jones is the program manager for the Tech Quest apprenticeship with Clark University. He has 33 years of experience in higher education and was most recently Santa Fe College's – which is in Gainesville, Florida – associate vice president for economic development, where he provided leadership for the Center for Innovation and Economic Development; which also includes the continuing education and corporate training, community education, and the entrepreneur incubator. He also provided leadership for the Gainesville Technology Entrepreneurship and the Innovative Product Development Center. Dug's educational background includes a bachelors, masters, and juris doctorate – not an overachiever at all, right, Dug – from the University of Florida. He's a friend; I can do that. The Tech Quest apprenticeship led by Clark University is a national partnership of institutions of higher education and workforce boards, and it's available in Massachusetts, Pennsylvania, Florida, Missouri, Texas, Nevada, California, and Oregon.

And now we'll go on to today's objectives. So we have lots of things to get through here today. We've already seen these objectives within the information that's come out to you, so let's move right along and get into it with our foundational knowledge of braiding funds. And by the way, Jon and I have control back again. Yeah. We have a poll question for you guys, but I think Jon is going to be popping out for it.

We want to know where have you received your additional grants funds from so far? So please go ahead and click on that. Wow, looking like most people have been receiving additional grant funds from federal funding sources.

Few from some states sources. Faith is starting to catch up. OK. It looks like that's everyone we have, and federal funding looks to be the highest level that you guys have been accessing. All right, so we want to get a few definitions down just to make sure that everybody's on the same page. When we're talking about braiding funds, we're talking about weaving together different federal state and other funding streams to support a comprehensive and integrated service delivery that's seamless for your customer.

When you're using multiple funding sources for one program or objective, each source of funding usually comes with lots of goals, target populations, and performance indicators. So effectively braiding those funding streams requires organizations to really track the requirements for each funding source. The Office of Management and Budget – OMB – encourages the practice of braiding funds because it is such a good part of project management and really is the best practice.

Plus there's no authorization required for you to braid funds. However, if you talk about blending funds, this is where you are literally putting all of the funds into one pot. And with this methodology, it does require authorization because those funding streams lose their identity and the tracking of their very specific goals or performance measures. So one of the big items to note as you go into braiding funds together, is that you have to up your communication level and your coordination skills, as you try to track all of the funding requirements.

OK. There's tons of benefits for braiding funds. You guys can probably come up with even more than what I've listed here. I just put some up that I know that in my work life I have loved being able to say, wow, that really helped us make sure that the grant could continue on past or the services could continue on past the grant. So as long as you're thinking creatively about what you need to offer your customers, you are going to be able to go out and find the resources for that.

The reality of it is that it has to benefit everybody. So if you're trying to ask people to put in dollars on things and it's wholly benefiting you, probably not going to work very well. It also usually is better if you make sure that your need is well defined and pretty narrow, actually. And this is definitely a long-term strategy folks, so don't worry if you haven't been braiding other funds yet. That's what this is about, just to give you some ideas how to do it.

So there are all sorts of funding sources that we can pursue, and we're going to take a look at a very tiny chart, I realize that. This chart is actually your handout that's called "Federal Funding Streams at a Glance," and it comes from the Annie E. Casey Foundation. They're a federal funding integrated service delivery toolkit, which there is a link to this in the resources page. And what the toolkit does when you go into that, is it expands upon each of the funding streams and the services that they can cover.

So this is just trying to show you that everything from case management to financial coaching even, can be covered by different grant formulas. In every single instance though, a participant's eligibility has to be established for the funding stream before any commitment of funds are put out from the apprenticeship program. So let's take a look at couple. And here's the first one I want to start with, which is all about DOL or state-funded grants for apprenticeship.

These are relatively new funds. Many states have received this funding to expand to the registered apprenticeships in their area. Funds have been awarded in 2016 and 2019, and there will be some new funds awarded to state as of June 30th, 2020. So coming right up for us. As far as how scaling apprenticeship grantees can work with these other grants in their state, or maybe even within an industry to expand apprenticeship, a working group strategy is very effective. (Inaudible) – is West Virginia.

They host quarterly round table, used to be in person, probably now hosting these by Zoom meetings which includes grantees, the apprenticeships, the director, apprenticeship coordinators and the regional director. And in these meetings, they discuss issues and best practices and the federal OA staff show them how they can help. Some of the issues that they have discussed so far is they're a small state, so they don't have a whole lot of grant money at the state level.

The technical college actually received a bigger grant from the state funds. So they figured out how to team up and understand the constraints of the college system and then adjusted. They've also worked through the definitions of what apprenticeship means across all the grants that there are, They've found ways to cooperate when they're visiting employers, because we all know employers do not want 50 million of us knocking on their doors.

So they are looking at how to approach them in teams instead. In each case, the state apprenticeship point of contact is the person to talk to about possible opportunities for collaboration, sector building or co-enrollment. And you see a link on there, that link will actually take you to your point of contact for your state. DOL strongly encourage us grantees to work with other apprenticeship grantees in their states, whether those are state grantees, H-1B-funded grantees or any other source.

So take a look at the scaling apprenticeship FAQ to find out some guidance on doing co-enrollment. On your WIOA funding, there are lots of services that can be provided, including on the job training component of the apprenticeship program, they can pay for the related classroom instruction, tuition books, supplies, fees, uniforms, tools. It's kind of like you name it. But you have to make sure that you've gotten together with your workforce for it to figure out how you jointly share these customers.

And customized training and income and worker training are also other ways that the WIOA funds can actually help support businesses that are sponsoring the apprenticeship programs. And if you're like, well, my workforce board, I don't know if they're very interested in this stuff. Well, according to WIOA Section 109 in part it says that workforce boards are to work with employers to provide opportunities for work based learning experiences, including internships, short term employment, apprenticeship, and fellowship.

So having a conversation with your workforce board, highly recommended. Voc rehab also has funding available. And with them in the state VR agencies, they usually set aside about 15 percent of their federal program funds to provide for pre-employment transition. These funds are set there to help students with disabilities transition into post-secondary education and employment. They also have funds to help employers with accommodations, and job coaching capabilities to help their customers as they go into the work site.

So there's a lot of things that VR can do, and helping engage students is also another great way to braid funds with them. The limits of voc rehab is that other federal funds have to be exhausted first. But if your grant doesn't cover things like maybe special accommodations for a student, then voc rehab is a great place to go and explore. Foundation funding. Wow, there are so many different foundations that so many different things, as you guys.

And usually their process isn't quite as intensive as say a federal government requests for proposal, but foundations still want proposals. Some of them don't even accept unsolicited proposals, they have to have it through a tentative application process. A lot of foundations these days ask you for a letter of intent as your first step before you go into a full proposal. And then you have foundations that will take those letters of intents or proposals on a rolling basis, meaning basically all the time.

And others have very specific windows for submission. It's difficult to try to keep track of all that, so creating a matrix similar to what you see on the screen right now is useful because you can now track the funding priorities for that foundation, any relevant timelines and what they're saying they need for submission. As you develop a letter interest, it is in your interest to make sure that it is strongly tied to the foundation's priorities and to your own goals as well.

So trying to make sure that you tell them how your work is going to tie to the foundation's mission, specific goals and objectives will make your proposal more viable. Foundations are also very interested in looking at baseline data in order to determine what kind of population you're serving and what kind of outcome data you already have. Now, sometimes we don't have that, but you can provide it in a qualitative manner maybe, rather than a quantitative manner.

Anytime you can include database outcome statements to a foundation, it is important for foundations because they will then be able to have a way to evaluate is this worth our funding or not? In the resources page we give you some links to different foundation resources and just a couple of individual foundations that are focusing on workforce. There are many. All right, few other places to check out. You already all know about employers and how they can be contributing all of these things that we've listed here, but you may not have thought about industry associations that might like to partner with you.

There are industries associations in just about any kind of area that you can think of, and they sometimes are able to fund specific things for apprenticeship and for other grants. In addition to that, banking has a actual requirement to get back into their community. So if you just Google bank community giving, you will find all sorts of banks that are required to give back, how they do it, what kind of application processes they have, all of that good stuff.

All right. So a few more things for you to think about is you're pursuing all these funds. First of all, you have to have a very shared growth mindset here, and customers are who you are sharing. So maintaining that focus on the customer is very important, and you're going to hear me say it again. And the other part here too, is that if you're looking how you can jointly increase the program, increase the kinds of outcomes and increase the services that you have, you will be more successful.

There is a couple of guiding philosophies that have been shown to work really well when you're braiding funds, and one is to always focus on that customer need. I told you I'd come back to it. And really this is about saying, what do they need, how do we get it? How do you increase different resources to provide different things? If they need transportation to be able to get to the school, or they need help with labs and maybe tools and things, then how do you do that?

And on the front office side, what we mean is that together, whoever you're working with in partnership, you're looking at the customer's needs. While in the back side, that means all of you who are programmed admins and things like that, you're going around trying to find the right sources to sit for them. So you end up creating a portfolio of funding streams for each individual student, which can sound daunting, but it really isn't. So a few things to consider as you start into that, it's a good idea to figure out what do you really want to achieve?

Because then you can figure out who you might have as a potential partner, and then you can go into, OK, what kinds of challenges might we face, and also will those partners stay with you later or do you need to figure out maybe some more partners to come in at a later point? There are several success factors that have been found with braiding funds, and the very first and foremost one is to have leadership on the same page.

So it's the leaders of the different partner entities that are joined in the goals and strategies that are going to help. Then you are going to be way more successful than if one is just coming from it's what I can get and what I can take, that kind of attribution, kind of focus, versus the contribution, what I can give. And then the other thing that I'm on besides on here is communication. If you were not in a communication mode with your partners at least weekly, then things are going to fall apart.

So the communication has been the way to make all of these other success factors happen. All right, it's time for us to start hearing from some of our experts, and I'm thrilled that our very first expert is Dr. Christine Gillespie. Chris?

DR. CHRISTINE GILLESPIE: Good afternoon everyone. Again, this is Chris Gillespie and I am calling from Bergen Community College in New Jersey. We were very fortunate with 14 of our partners, community colleges in the State of New Jersey to be awarded one of the H-1B grants, scaling apprenticeship grants in healthcare. We are one of the few in the country that were awarded for this particular sector, but it happens to be one of the most in demand sectors in our particular area of the country.

So I thank you very much. Lisa did a terrific job of laying out where a lot of the money comes from and some of the questions you need to ask yourself. I would like to emphasize though, and my old teaching skills are going to come up and say you need to write this down. You need to know one, where is your funding coming from, two, what are the restrictions around that money? And I think the template that Lisa mentioned is great.

I think if you are a visual organizer, some sort of graphic, whether it's an Excel spreadsheet, that's color coded, whether it's some other organizer that you use, it's very important to identify what is it that a student will need? What do you need money for? And then where are the money that you – The money that you already have, where can that be plugged in to meet those needs? What that does is, it's a gap analysis, it shows you visually where you may need some additional funds and some additional partners.

That is extraordinarily important, because what that does is helps to narrow down, as Lisa mentioned, what kind of money are you looking for? It helps you to target the kinds of partners that you might want to try to engage and bring into your consortium or your partnership, or into your braid for the funding. So I thank you very much. Next slide please. So we talked about the potential funding streams, the one that I'm going to focus on a lot today is going to be the private funding.

So we'll talk a little bit more about that, although I'm going to say that our state has been extraordinarily supportive in all of this. Next slide, please. So for our work, our consortium applied for the full $12 million and were awarded the full $12 million. What that means is we had a cash match that had to be made and we had to source that information. I put all the federal funding that's going to be contributing to our grant here because I think it's important to see the different kinds of groups that can contribute and how they might contribute.

A lot of this also has to do with the requirements of the grant and how you developed your statement of work. In our case, we also had another consortium that was awarded an H-1B grant, and that was the Career Advance USA. That is focused on the manufacturing industry. However, we were very, very early on encouraged to create as much synergy as we could between the two grants and any similarities in activities. One area where we are leveraging our funding is in the training of mentors.

We are doing Train the Trainer mentorship sessions so that all of our institutions will then be able to roll out training mentors with their local employers as this is a statewide initiative. So that's one example where Career Advance had money budgeted for that. The health workers grant did not. But we needed both of us together because we can help provide enrollment and make it more economically efficient for everyone. U.S. Department of Veterans Affairs is very important, particularly for our veteran community and the GI bills, getting our programs approved if you haven't already done so.

And the last one on our particular list are the TPSID programs, the Transition and Postsecondary Program for Students with Intellectual Disabilities. We at Bergen, our individual institution happened to have a grant that serves the students. And they are already enrolled in many of the credential programs that we are selecting within the healthcare industry. So we're going to be leveraging some of those funds as well. Next slide, please.

OK. So as I mentioned, there was a 35 percent requirement for whatever level of funding you chose to apply for that corresponds to a 4.2 million cash match gap. So this is all about where do we find that money for the match? Now, the next first question is, are the monies a federal pass through? So you've got your federal monies, you're applying for it, are there state funds that are available? There may be state funds available, but you need to be careful about where those funds are coming from.

Because if they're a pass-through from federal government that might be considered "double-dipping", so you need to be very careful about where the funds are coming from and make sure that it is not considered double-dipping when you put that in your proposal. But our state department of labor was wonderfully generous and we got $1.68 million in match from them. We are also going to be getting some match from the division of vocational rehab through that program that I mentioned previously.

When we submitted the grant proposal, we had no idea what that money would be, but we did add them as a partner with a letter of support and simply stated that that funding will be variable depending on the participation of appropriate candidates in those apprenticeships. Local funds, again, it's the same question you have. Are they a federal pass through, or now, are they even a state pass through? So this comes to your workforce development board through WIOA.

We have ITA, the individual training accounts for those that are unemployed. You have OJT, reimbursements for employers who are hiring them. Obviously many of us use that, the 50 percent up to six months or $8,000 right now. Another benefit that we have used occasionally are the extended benefits for those that are in longer term training programs, particularly if they're on an in demand industry. So you may want to explore those.

Institutionally, we had some funds. You have to look internally as well and we have 14 partners. I gave you an example or the examples I'm using today are from my own institution, but each institution has their own internal funds that they might be able to leverage with their apprentices. We're going to be using the turning point and a lot of the GI. There are others that had DOS programs, there's all kinds of opportunities, ESL, HSE, there's lots of things that people can use to do this.

Local school district. We have a technical school district system in the state of New Jersey, and we're going to be getting some recruiting from them. We're also going to the working with some of their employers that their high school students are working with as part of their internships at a high school level. And then our library system in New Jersey is also a great source of recruitment. We have a fairly large immigrant first-generation family population in the state of New Jersey.

They access our library systems very, very often, and many times that's where they get their ESL and high school equivalency information. And then they can be forwarded on to us for workforce development, and in this case, obviously, apprenticeship opportunities. Private funds. Please, please do not forget your private funds. Your employers are your best and sometimes most influential partners. One of the things that we found is that our private partners were able to nudge some of our public and government agencies to support our efforts because they felt –

It was them convincing our social agencies, yes. We need these employees. Yes, this is the kind of training that we're looking for. In our grants as it turns out, our employers will be contributing 2.5, $2 million in cash, and that will be as part of the paid salaries that they will be paying our apprentices. If you have any questions as we go through this, please pop them in the box and I will do my very best to answer them as we go. So just a quick graphic, if I can get it to stay there.

Oops, try one more time. There we go. So we've got federal funds, we've got state funds, we've got local funds. Typically, your first step is to take one from each pot. You can occasionally use two from a pot, but you must always get permission, check with your federal project officer. You want to be sure that those funds are not coming from the same source. And then in the bottom, I've got all of the private opportunities that you have.

You have foundations, industries, associations, I put our employers in, food pantry, dressed for success opportunities. And many times the restrictions on the private funds are far less than you will find with the federal state and local funds. So once you plug the most restrictive funding into that graphic or visual organizer that you're using, you can go after the private funds to plug the holes. And then last, I focus mostly on passion match, because that was a big portion of this grant.

Please don't forget all of the in kind and leveraged funding that you might be able to come up with. And that can be everything from the governmental offices, for example. We did not budget in our grant for any data managers, so to speak, for our data collection system. However, there was a guru, is a guru, in our state office of apprenticeship who is going to help us with the organization and the formatting of some of our information.

Leveraged funding, other programs that are happening on campus. I would, if you can – The other thing I did want to mention, if you do not have a good data management system that can track the funding, whether it's cash or in-kind or leveraged, I might ask you to investigate that because that makes this process much simpler. And many times one of the value adds that we give back to our employers or give back to foundations, is we give them the information about how we use their money.

And that goes right into their reporting and it makes it much simpler. Because a lot of times the smaller foundations and employers, they don't have that kind of infrastructure. So that's a value added that we can give back to them about how they're spending their money.

MS. RICE: OK. Thank you very much. Good. And now we have Marci Murphy, president with CareerSource Brevard. Marci, take it away.

MARCI MURPHY: Thank you, Lisa. There are infinite pathways you can use to braid funds together. At CareerSource Brevard we braid together our WIOA formula funds, our WIOA governor reserved state set aside, foundation funds, and now WIOA federal and state funds. What I will do today is to give you some examples of how we braided together funds. The first two examples are three funding streams we braided together in the last two are four funding streams. The first one is the pre-apprenticeship for skilled trades.

Our governor is very focused on apprenticeship and pre-apprenticeship, and so he set aside, governor set aside WIOA fund. So we've got pre-apprenticeship dollars that we worked with our adult education. So we partnered with adult education and we did a pre-apprenticeship skilled trades grant. And this particular – We then after that used our formula funds to give work experiences to the students after they were done completing their pre-apprenticeship. Another example was our Aeroflex pre-apprenticeship grant.

This was also started with the governor state set aside WIOA funds. This was a planning grant, and so we utilized the money to plan. This was a online classroom training for our aerospace companies. And we used our formula WIOA funds for the training piece, and we also partnered with Florida Makes, which is a state manufacturing organization in Florida and they went after a NIST grant, which is the National Institute of Standards and Technology grant. And they built Aeroflex in.

So we used those three funding streams to roll out the Aeroflex pre-apprenticeship program. Another example was AARP 50 Plus foundation grant. AARP partnered with our state college. In Florida community colleges are called state colleges, and AARP worked with the state colleges and they asked us if we would be a sub-recipient of the grant. So the grant basically had two tracks, one was the training track, and one was the jobs track.

So we worked together with the ARP and state college for this particular grant. We used our formula funds to do OJT for it. And then we also brought in a foundation grant, Wells Fargo. We use the Wells Fargo grant for support services, to give our participants uniforms or tools that they might need for their job. Another example was with our healthcare sector, our largest employer in the healthcare sector, a member of our county's health first, and they have a foundation grant.

And they gave us money for a sector strategist. And so we have a sector strategist that brings together communities, community based organizations, education, and businesses together to look at the healthcare industry, and so help solve the workforce issues in that industry. And the governor had a state set aside grant in nursing, and so we used money to put LPNs into training. When that grant was over with, we brought in our formula funds to continue to train LPNs and CNAs.

And then we also went after department of education college access network grant, and this helped continue to build stakeholders for our sector initiatives? So those are four examples that we currently are using, and I thought I would share that with you guys. The next thing is we've been doing in grants for a very long period of time outside of our formula funds. So I thought it might be important to share with you some of our tips on going after grants.

As far as research goes, Lisa has given you a lot of links to look up. One tip I would say is that as you look for a grant, focus on a showstopper. So a lot of times you come together, you find a grant, you say, this looks great, you bring people in, they're like, "Yeah. We think we could do this." And then they talk about how they're going to roll it out, and then as you get into the grant, you realize there's a piece of the grant that you can't accomplish.

So I suggest to just focus on trying to find that showstopper. For instance, you might realize when you look at the outcomes that they're really for a large metropolitan area, and Brevard County for us we are not a large metropolitan area. So that's an example of the showstopper that you really need to find at the beginning of the grant so you don't waste any time. Grant writing. Most of my staff can write grants, however, if it is a federal grant, we do hire somebody to write the grant.

Somebody that is well versed in that particular federal funding stream. Partnerships. Partnerships are absolutely important. I would say sometimes it's best to be a sub recipient and not the recipient of the grant. So don't look at it and say, "You know what, we have to receive this grant. We have to be the recipient." Because as the sub-recipient, you can get the same thing for your bank and you might not have to put out a lot of resources for the reporting piece of it, and so on and so forth.

So keep that in mind. Developing relationships and trust. This is so important. If you have a history of writing and implementing good grants, you have the funders sometimes come to you. For example, we have Wells Fargo and ARP in our County that come to us whenever they have grants available, because they know that we can deliver and be successful. So developing that relationship and trust is so important. Also going beyond what the grant requirements are.

For example, AARP has asked us to sit on panels with them and we comply and say, sure, even though that's not part of the grant. So developing that relationship and trust is very important. Also being proactive. I want to give you an example. A lot of grants, the states have to apply for, and you can't apply for them at the local level. For the opioid grant that Florida has recently received, we actually called the state and talked to the grant writers and say, hey, have you guys considered going to this grant? This is the benefits for Florida and for local areas.

And they said, no, we haven't; can you write us up a part of it? So we wrote the grant to the state of Florida, and then of course they modified it before they sent it up, but then Florida received the dollars. So being proactive is also another tip I would recommend. Scope fit. You don't want to sit a square peg in a round hole. Sometimes the grant is just not a good fit. For example, if it requires a major partnership that's needed for the success of the grant and you haven't even developed the partnership yet, I would wait and develop the partnership and then the following year look for a grant with similar requirements and go with it.

Because at that point you have the partnership developed. Extensions and modifications. It's always great – I've never known a grantor that's wanted their money back. So if you need an extension ask for it. We've always been able to get an extension. Sometimes it comes at the very last minute because they want to make sure that you're moving forward, that you are meeting the outcomes before they actually give you an extension.

And it's usually a no cost extension without the money. And modifications, if you received a grant and you might say, man, if we could just tweak this, we could do so much better, reach out to the grantor, ask them. It's always good to apply for modifications at the very beginning of a grant. So those are some tips. Back to you, Lisa.

MS. RICE: Thanks. All right. Great. Thank you very much, Marci and we appreciate your insights. And we'll move on with Dr. Dug Jones. Dug, you ready to go?

MS. MAKONNEN: I am. Thank you so much for including me. I've really learned a lot already today and appreciate the information that's been provided by colleagues. In fact, they've done such a great job of sharing the important information. I'm going to be a little bit careful not to be redundant. But I do hope that I can add a little bit of value by sharing some information about our tech quest apprenticeship project.

As Lisa mentioned, my background predominantly in higher education but our project has had the benefit of a strong partner in the professional consulting group who's helped those of us at Clark who are a little newer in this area with a lot of the important pieces that make it all fit together very nicely. Tech Quest may be a little bit unique in that our project realized a great deal on a number of local workforce development boards and other partners from about a dozen different regions around the country in eight different states.

This has required us to spend a little bit of time upfront organizing the approach so that it was something that was going to work well, not just in one immediate region, but for others whose circumstances and approaches maybe very different. The project, the Tech Quest project was designed to enhance programs and initiatives that were out of place, but our deliverables, if we were going to create five new apprenticeships in the IT sector, and also to expand five other apprenticeships.

This made it important for us to do a lot of upfront work in conversations with our workforce development board partners and with IT industry partners, so that we were very clear on understanding what the need was. Clearly if our plan is to create new apprenticeships and expand others, we need to make sure that those are pointed and focused exactly in the areas where they need to occur. So with the local workforce board partners and the communities we're working with, are being encouraged to look beyond their traditional workforce funding.

And my colleagues shared, I think, a lot of information about that, WIOA funding another formula funding. We've encouraged them to look at co-enrollment opportunities with WIOA, TANA, SNAP, VA and others, so that we can get people moved through this continuum from really just exploring opportunities through a pre-apprenticeship and apprenticeship and then get them into the workforce. We're going to be placing 5,000 IT industry apprentices and pre-apprentice with over 50 different IT industry employers.

So again, this is requiring a great deal of coordination, and the braiding of funds, today's topic, is really important for this reason, because our grant is certainly providing resources and support and expertise and some funding in a number of areas. But by no means are the workforce boards going to be able to accomplish this without also braiding other funds along the way. And thanks for advancing my flight, apologies for failing to do that.

So when we talk about how we've done it so far, is we've developed these partnership agreements with these 11 different workforce boards and move through a process of having funding agreements with them and then moved into working directly with them to help them develop a training plan that will connect to the apprenticeships that are being created and expanded. But we'll also position them to get the funding that they need, not just from us, but from additional sources.

The 11 groups that we're working with when the grant was initially proposed didn't include all 11 of these partners. We added a couple who along the way found out about the project and had interest in it. And and that's been important for us to have that flexibility as we move through the process, to add other partners that can bring value and for whom their region is going to benefit a great deal from having the apprenticeship opportunities.

We support these workforce boards and business services with a variety of resources, apprenticeship overviews, we help them assess the opportunities and we make introductions to help them with some collaborations, and we talk a lot with them about strategic opportunities that are going to help them be sustainable after the grant ends. At the end of the day for this project, and I suspect everybody's – We need to leave something at the end of the project where this moves successfully forward and continues to do the good work that the grant is helping us facilitate.

We're going to be meeting very regularly. We met early on in a virtual meeting. We had initially planned on having most of our partners together with us at norm, but the circumstance with the pandemic made that impossible. But we were able to have a virtual convening early on to get folks oriented to each other into the support that they were going to have. We'll be meeting together with some regularity in the group in order to share progress across the groups and more importantly perhaps to share best practices along the way.

So it's important, I think as we talk about the match funding in our match, like Christine's is 4.2 million so it's a large sum of money. But it's important that we all understand that each of our grants, even if the numbers are similar or very different, and the plan or proposal to meet that match will have some level of flexibility in terms of when we write the proposal there's areas that we expect to be able to secure the most match, but there other areas that we find along the way to where we can leverage those additional funds.

So as we talk about our particular project, and you can see from the slide there that we've got a number of areas where we are matching with some incumbent worker salaries during the training, one really important piece is the Jira platform that the public consulting group has provided. It's a work based learning platform that also allows us to track participants through the process in all 11 boards. This is a very significant and important tool because with the 11 or 12 different regions the way that they have collected information in the past and the way that it gets reported isn't always exactly the same.

So having a tool like Jira, and also I think one of the other presenters also mentioned other software that helps. We're using AGS Prime as well. So having those kinds of tools, I think most people are going to want to look at the value that that brings to them and consider that as an important piece of their grant. And then another area is the apprenticeship OJT match. And that's only for employers with more than 50 employees and for those particular employer partners we're going leverage that match fund.

We've got a little – When I moved to another slide, we've also I want to share information about relationship with the employers that have less than 50 employees. In fact, let me go ahead now and say that for the IT companies of 50 or less employees, we're able to use some of the grant funds to support their salary costs, but that's up to 50 percent of the rate of pay and for up to six months. So for those smaller IT companies we're able to do that.

For the IT companies that are larger than have more than 50, we don't use the grant to support that expense for them, but we do get to count the money that they spend for OJT salaries towards our match. So it's an important distinction, at least for us in our grant on the size of the company, what we can do. I want to make sure that I share here that, again, because each grant is different and there's a lot of these moving parts that it's important that you work very carefully and directly with your own FPO to make sure you're really clear on what you can do and what you can't do.

So what we've learned so far in the project, I think is that – And we're just really getting placements moving right now. Early on we had a large amount of infrastructure that had to be built and created and installed so that it would work across the at least eight different states. Like everyone else we also had to navigate the COVID pandemic in terms of our workforce support partners ability and readiness to begin recruiting apprentices, most now reopening and getting that contact opportunity sped up.

So I'm sorry, numbers should be able to catch back up to plans, but like most folks we've had about a one-month delay on this. We've learned also that we want to start with getting people that we'd like to see without any barriers and then scale back to what can be done now and incrementally. Again, because this is a large and complex project with so many different partners from different regions we need to be begin by being good listeners.

We spent a great deal of time early on understanding what our partners needed to make this work, what the industry needed in terms of how we create these apprenticeships, what the workforce boards need in terms of making it work within the context of what they're doing within their regions. And then from there once we had had a fuller understanding, then we're a lot more capable of tailoring our support to meet with each of our partners' unique needs might be.

I'm going to share one example; I think Marci – Brexit. Yes.

MS. RICE: Time check.

DUG JONES: Yes.

MS. RICE: Dug, I'm sorry. I'm just going to give you a time check. We only have about four minutes left for the whole seminar, so you have the review the time. Thanks.

DR. JONES: OK. Thank you. So I will skip the example then, because I think Marci's example get those points really, really well. In fact, the tips, I think the slide in the tips are probably very, very good therefore folks can read them as we move on. Only thing I really want to add to that is that the project is intended to build and strengthen relationships that can lead to partnerships and collaborations. So we always want to keep that in mind.

If you're in a college community, these types of projects are great opportunities to engage more fully with your workforce development board, your chamber, city, and county governments. So yeah. Thank you and apologies if I ran long.

MS. RICE: You're OK. Thank you very much, Dug. So if you guys have any questions, you can go ahead and type those into your chat right now. In the meantime, I just want to ask really quick a sentence or two, maybe for each of you or for a couple of you. What has been the hardest thing for you when you go out to find those braided funds or get those braided funds? And I don't know, let's pick on Chris to answer that first. Chris, what's been the hardest thing for you?

DR. GILLESPIE: I'm sorry. I had to unmute myself. I would say very simply explaining what a practice is, how it operates and how they can partake and benefit from an apprenticeship model in their institution.

MS. RICE: Awesome. I'm going to bet that everybody else probably agrees with that. If you have other questions, you can still type it in, we may not answer it right now but we can circle back to you. I'm sorry guys, but with only two minutes left, I'm going to continue us on real quick, just because I want to make sure that you get to see the resource pages. Very important for you are a lot of U.S. DOL pages that you can grab information from.

And also we've put in a few others for you, which are some places where you can go to find out about grants. There's actually really cool foundation directory that is under the canvas area, which used to be GuideStar. But you can actually access it for free through your library so take advantage of that. And then these are the couple of foundations that we just grabbed. There's tons of them, doesn't mean that these are great or that they're highly outstanding.

And so we do have one question from Diane asking us if we could send out the information regarding the workplace-based learning platform that was funded. And Dug, that is yours so I don't know if you feel like sharing that information or can't, but that'd be cool.

DR. JONES: OK. Yeah.

MS. RICE: All right. And then we also had another question for Dug. The difference between the two employer match examples from slide 44, which has the worker salaries and then it also has the employer portion of the OJT. I'm going to get you back to that slide. Do you want to address that one? I think they were trying to figure out your difference there.

DR. JONES: Sure. OK. So what's the difference there I think is that incumbent workers are folks that may already be employed, but who can still who can still become apprentices. And so that's different than a new person who comes into a training – (inaudible) – apprentice.

MS. RICE: OK. Very good. And I don't see other questions that have come in at this point, but again, if you guys have – you can always ask your technical assistance coach, we can help out with those things. And also I'm going to take this back to our resources here and actually turn this over to Zodie.

MS. MAKONNEN: Thank you, Lisa. And thank you to our presenters for taking the time to share your experiences and expertise with us. And as far as questions, please make sure you send your questions to ScalingApprenticeship@dol.gov, and we will try to respond as quickly as we can. And we look forward to speaking to you soon. It is 4:01 now, so I hope everybody has a great rest of the afternoon.

(END)