

July TA Peer-to-Peer Call Notes

From Start to Finish: Participant Tracking & Follow-Up

DATE: July 25, 2023

TIME: 3:00-4:30 P.M., EST

GRANTEES IN ATTENDANCE

- Total Attendees: 29

PARTICIPANT TRACKING DISCUSSION & CHALLENGES

Discussion

- Tracking and follow-up allows grantees to make decisions for future funding opportunities or program planning.
- The data collected from tracking outcomes can be used to potentially implement improvements to your current project or anticipate future needs that your organization might have for similar projects.

Tracking Outcomes

- **What types of data tracking tools and software are being used?**
 - Some grantees shared that they are using GeoSolutions to track participants.
 - One grantee indicated that they use Redcap, as it's really secure and intuitive as it relates to participant tracking. This software also allows the grantee to edit data easily without deleting previous details, which helps maintain the overall integrity of the data.
 - Redcap has an online community where users can ask questions and share tips. They also have a weekly meeting to address any issues or concerns that users may have.
 - One grantee shared that their non- Workforce Innovation Opportunity Act (WIOA) program was integrated into the state's WIOA program, which makes it simpler to verify co-enrollments.

Communication

How often do you communicate with program participants?

- One grantee indicated that they communicate with participants monthly, which includes live 90-minute sessions, providing additional programmatic education, and support to address any struggles that the participants may have.
 - This grantee also shared that they meet with their site coordinators monthly and their advisors quarterly.
- Another grantee shared that they schedule Teams meetings with employers' Human Resources (HR) directors and employees. If they are unable to meet with the HR directors, they are still able to have conversations with the employees.

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- One grantee mentioned their career advisors meet with participants weekly in most cases, who reach out to participants to ensure accurate credentials are recorded.
 - As it relates to monitoring participant contact, this grantee reviews client activity at the beginning of each week. If necessary, the grantee will reach out to the career advisor for updates on the client's training activities. This allows the grantee to stay ahead of potential issues like clients who need extensions.
- Other grantees mentioned using websites like Monday.com to help with participant follow-up and tracking.
 - A grantee shared that they use Monday.com for their enrollment forms and all of their tracking. In addition to Monday.com, the grantee also uses PHRYSA management software.
- One grantee recently began using AGS Prime because the state's system did not have all the necessary reporting elements. AGS Prime allows the grantee to generate reports that reflect all the information needed for submitting accurate data files in the Workforce Integrated Performance System (WIPS).
 - AGS Prime also has a self-registration feature that the grantee uses during recruitment and outreach efforts, which helps them to start building their case management.
 - The grantee is also able to upload all of their documents into AGS Prime, which maintains security and decreases the need to store paper files.

What challenges do you face in participant tracking?

- Grantees sometimes experience challenges maintaining accurate participant records as there can be frequent changes in staff.
 - One grantee shared that they have experiences challenges with staff turnover affecting participant tracking. The grantee shared that properly training new staff members helps alleviate some of the struggles associated with acquiring new staff during participant tracking processes.
 - Another grantee shared that they created a 21-page user guide and a training video about how data should be entered. The guide includes screenshots, information about their case management system, and a Q&A section.

PARTICIPANT FOLLOW-UP DISCUSSION & CHALLENGES

Discussion

- Grantees shared that they convey to participants early that follow-up conversations will occur throughout the training process and once training is completed. They also shared the challenges that they experienced in attempting to follow-up with participants.
- A coach shared that follow-ups should be scheduled at regular intervals throughout the program. Grantees should consider the type of feedback that is desired and develop protocols based on the feedback selected.
- Another coach shared that there are several methods that can be used to collect participant feedback such as phone calls, meetings, or surveys. It is important to determine the best method of gathering feedback based on the program.

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Challenges

- Some grantees shared that they have experienced difficulties with participant follow-up once the participants are no longer receiving funding. It becomes difficult to follow up with them.
- Another grantee has had difficulties finding an effective way to communicate with participants to conduct follow-up conversations.
 - To counteract this challenge, the grantee altered the language used in follow-up emails to ensure that they asked the proper questions to maximize the information received from responses.
 - During touch bases, the grantee also gives the participants the opportunity to update their information such as adding a new email address or phone number.
 - Additionally, the grantee allowed participants to provide multiple email addresses during the onboarding process, which provides different avenues to contact the participants for follow-up information.
- Some grantees have challenges with participant resistance when conducting follow-ups. Participants may be hesitant to share their personal information or to participate in follow-up activities.
 - To address this challenge, grantees should try to be transparent about how the participants' information will be used and share how follow-up activities can benefit them.
- Other grantees have challenges with technology. Finding the best software to track participants can become a barrier.
- Some grantees have challenges with resource constraints. Limited resources can impact the frequency and effectiveness of follow-up activities.

SUCCESSFUL STRATEGIES/PROMISING PRACTICES

Participant Follow-Up

- A few grantees shared that implementing incentives or supportive services for participants who respond to follow-ups could be effective.
 - One grantee has begun to use incentives to ensure that they receive follow-up responses. The grantee is incentivizing them to reach back out and maintain a connection by paying for specific things that the participants need for their jobs, such as stethoscopes, scrubs, etc.
 - Another grantee suggested offering assistance with NCLEX or other certification exams to increase the likelihood of participants responding to follow-up requests.
 - Another grantee mentioned that confirming allowable expenditures before offering supportive services allowed them to help a participant complete an apprenticeship and obtain an appointment by ensuring that the participant had reliable transportation.
 - One grantee also shared that they have a provider list of those who fall within their supportive service limit. They have policies and procedures in place to ensure that participants are receiving the proper services for the issues keeping them from completing their trainings.

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- One grantee shared that they focus on the trainings and credentialing programs that require the most to complete and help their partners by staying in contact with participants throughout the entirety of the program.
- One grantee stated that is important to inform participants of the follow-up process during enrollment. The grantee recommended informing participants of the follow-up timeline during the enrollment process so that participants can anticipate being contacted.
- A coach shared that scheduling group follow-up activities and adding automated texting can help make follow-up processes more efficient.
- Another grantee shared that they have procedural checklists for their employers and their participants that are distributed at regular intervals.
- One grantee mentioned that they conduct a series of classes over time to train their incumbent workers, preceptors, and mentors. After every class, they distribute a survey to ensure that the participants find the classes useful.

Participant Tracking

- Grantees can use LinkedIn to search for participants who have been difficult to reach. Using LinkedIn allows the grantee to verify if the participant has changed employers and also offers another method of contact.
- Another grantee shared that using social media sites such as Facebook to track younger participants could be a feasible option if maintaining contact with them has been difficult.
- One grantee suggested sending emails or texts to participants that ask specific, leading questions related to the current employment status. *Ex. Are you still working at [Name of Company] for [Number of Work Hours] per week for [pay rate]?*
- In preparing for site visits, it is important to ensure that all documentation is valid and substantial to increase the likelihood of a successful visit.
- A coach shared that grantees should be aware of how data is stored and managed. Grantees should also ensure that all database management systems are secure and confidential.
- A coach also mentioned that grantees should ensure that clear data management policies and procedures are in place to protect the integrity of participant records.
- Another coach suggested that when looking for software to track participants, grantees should ensure that the software is user-friendly to ensure that participants can also use it, if needed. Providing training and support on how to use the support can be beneficial for participants who also have to use the software.
- One grantee mentioned using surveys to obtain participant information. In composing the survey, the grantee first assesses the qualitative and quantitative measures for which they want to collect information.
 - The grantee found that it is best to distribute the surveys at or near the end of program completion, which allows the participants to more accurately answer the survey questions. The grantee conducts bi-weekly follow-ups after distributing the initial survey.
 - The grantee also conducts qualitative interviews, which allows them to obtain information that participants may not want to openly share in a survey. The responses from the qualitative interviews are used to shape future trainings and classes.

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