

Participant Support Lifecycle

The **Participant Support Lifecycle¹ (PSL) model** is a framework that workforce grantees can use to gain a comprehensive awareness of their participants' training journeys and help identify critical moments where participants disengage (i.e., loss points). Understanding your program's participant loss points can open up new opportunities for participant support.

Informed by evidence and rooted in proven practices, the **PSL** provides a method for organizing and evaluating participant data and training milestones. It includes planning steps meant to empower you and your program to assess your current program delivery; identify areas of risk; and plan for targeted interventions at each lifecycle phase.

LOSS POINTS

Loss points are critical moments where participants may drop off or disengage.

Using the PSL to Design Participant-Centered Supports

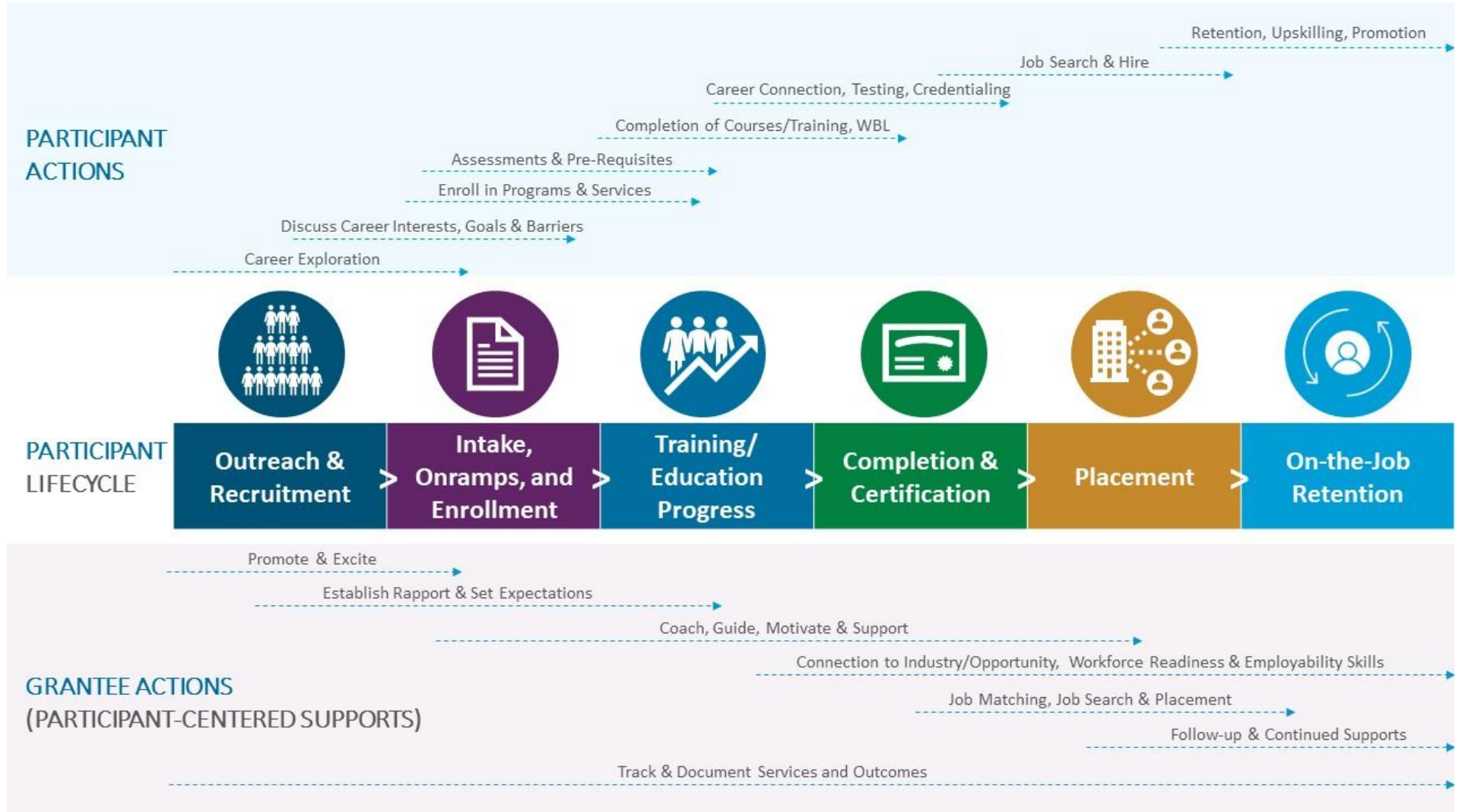
- **Step 1 - Define/Refine Key Components and Milestones** invites grantees to identify their own program's components and milestones and adapt the lifecycle to reflect their specific program goals.
- **Step 2 - Align with Metrics, Identify Potential Loss Points, and Brainstorm Strategies** assists grantees to identify loss points and the potential barriers participants experience in each phase.
- **Step 3 - Explore Resources and Promising Practices** offers resources to grantees that may be valuable for addressing loss points and strategizing for improvement in each phase of the lifecycle.
- **Step 4 – Plan for Action** provides a tool to assist grantees with creating an action plan to mitigate the impact of loss points, maximize the success of participants, and achieve success toward grant performance goals.

The four steps in this model can help you analyze your program and design targeted participant-centered supports that are based on identification of your program's unique training milestones, alignment with program metrics, and a recognition of your program's specific participant loss points. The model is applicable to both a "traditional" training-to-employment program and programs built around work-based learning experiences (including apprenticeship).

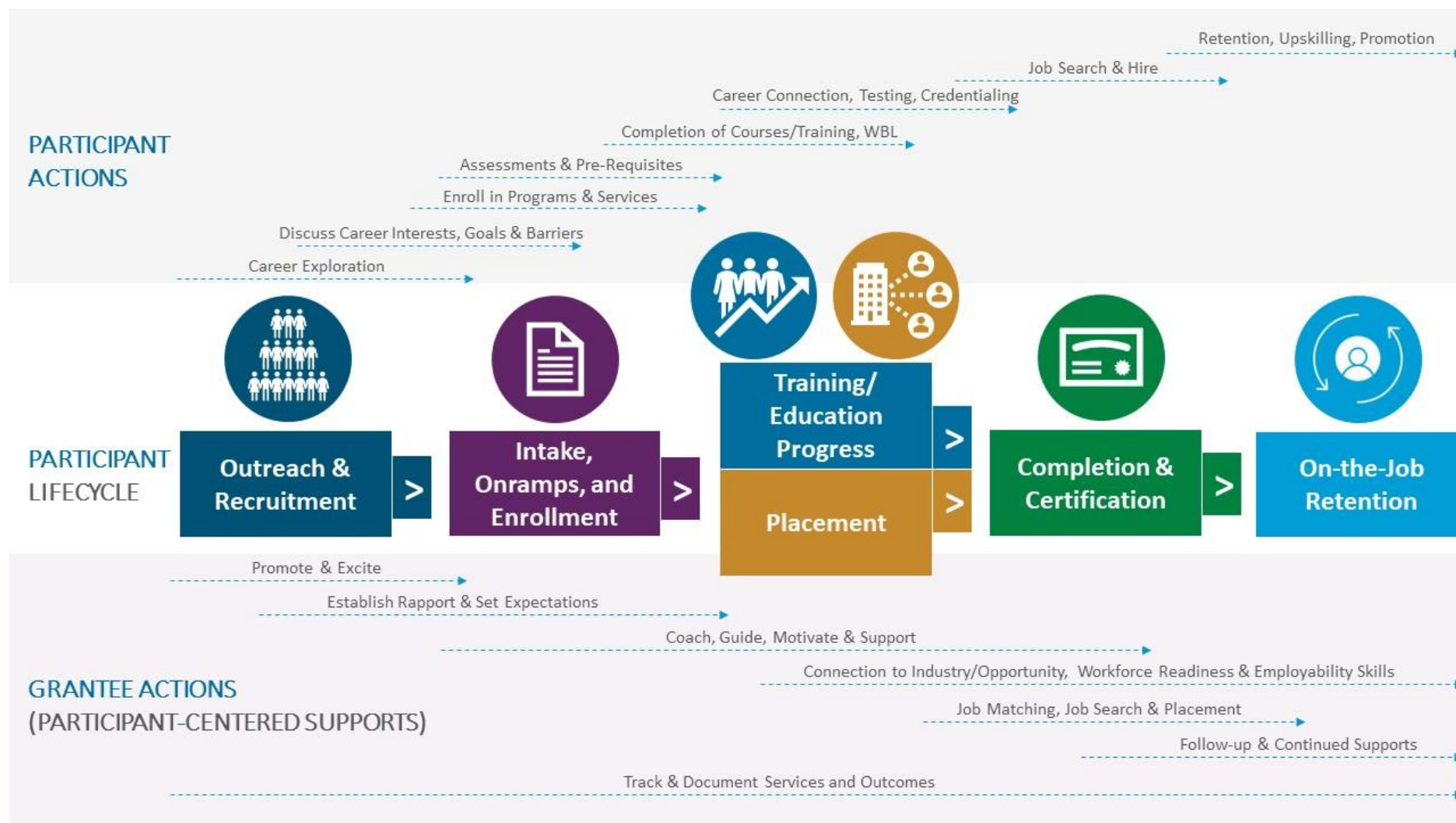
¹ The Participant Support Lifecycle is loosely inspired by other evidenced-based research and tools, including [Effective Case Management and Counseling- The Role of Triage and Documentation](#) and the [Understanding the Student Experience Through The Loss/Momentum Framework: Clearing The Path To Completion](#)

Participant Support Lifecycle

Traditional Training²



Alternative Participant Support Lifecycle for Work-Based Learning



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Designing and Evaluating Your Participant-Centered Supports to Identify Milestones, Align to Metrics, and Identify Loss Points and Challenges

Step 1: Define/Refine Key Components and Milestones and Align to Metrics

The table below provides an example of potential activities that may occur in each phase of the participant support lifecycle. They may not exactly match your program design but are intended to give you an idea of the types of activities that may be involved in each phase. You should use this table as a jumping off point and edit it to reflect your specific program, so that you can begin to understand the strengths and challenges your grant is experiencing at each phase in the participant lifecycle.

As you look at the examples, ask yourself:

- Do these activities and milestones listed reflect our grant program/approach?
- Are there components missing? If so, add them. If the components already listed are not relevant, remove them from each phase/column.
- Are there components that should be shifted to different phases in the lifecycle? If so, shift them to the relevant phases of the lifecycle.

Add, delete, or rearrange activities under each phase of the participant lifecycle, as appropriate. When complete, the Step 1 table on the next page should reflect the realities of your specific program.



Outreach & Recruitment	Intake, Onramps, and Enrollment	Training/Education Program Progress	Completion & Certification	Placement	On-the-Job Retention
Key Components & Milestones • Outreach to promote opportunities • Community connections and recruitment strategies • Program/opportunity overviews and promotion • Strategic recruitment targets and events	Key Considerations & Components • Various onramps to programming • Equity of access • Intake processes • Career Guidance • Eligibility determinations • Initial case management • Assessment tools • Info/data collection and expectations • Assessment of barriers and potential supportive services • Transition to training • Tracking progress/conversion to trainee/student • Enrollment, documentation of participant	Key Considerations & Components • Completion of “gatekeeper” or prerequisite courses • Required training/education – through 75% completion • Learning pathway/progression • Supportive services for retention/success • Practical application, work-based learning, simulation • Ongoing career and guidance counseling • Identification of needed academic and resource interventions • Tracking of process toward graduation • Networking and peer connections	Key Considerations & Components • Last 25% of courses • Academic and career advising • Career trajectory discussions – to employment or additional training/education • WBL and connection to career opportunities • Course completion • Required exams and assessments • Credential application and attainment • Tracking and reporting of milestones and outcomes	Key Considerations & Components • Connections to employers • Resumé prep • Interview prep • Job search • Job acquisition • Tracking of placement outcomes	Key Considerations & Components • Retention for 3-, 6-, 9-, and 12-months • Retention supports (career and supportive services) • Upskilling • Promotion along or across career pathways

Step 2: Capture Potential Participant Loss Points, Challenges, and Brainstorm Strategies

After completing the Step 1 exercise, use the following table to identify the current or potential loss points (places in your process and interactions where candidates or participants drop out) and areas of risk in your specific program. You should start with identifying the actual numbers of candidates/participants you are currently capturing at each phase and determining how many you are “losing” between each phase.

Column A: Data - Choose a period of time (e.g., the last twelve months) and identify the actual number of candidates and participants your program served in each phase in the lifecycle. You may have to estimate for “Outreach and Recruitment;” just do your best. Enter that number in the box for each phase under “Column A: Data.”

Column B: Loss Rate/Risk – Identify the points at which you have the greatest risk of losing participants. In other words, where do you lose the highest percentage of participants? You can determine this by dividing the number of participants in each phase by the number of participants in the previous phase. This will give you the percentage of participants who continue to the *next* phase. To determine the percentage that you lose in that phase, you can simply subtract that percentage from 100 percent (%).

- *For example, if you have 100 people enrolled, but you only start 20 people in a training program, you’ll divide 20/100, which equals 20%. To get your loss percentage, you’ll simply subtract 20% from 100%. The equation looks like this: $100\% - (20/100) = 80\%$. In this scenario, your loss rate would be 80%.*

After you have done this for each phase in the lifecycle, determine where your greatest risk is by looking at the highest percentages. These places may be where you would have the highest impact with improvement and interventions.

Column C: Challenges & Loss Points - Examine your program and processes, especially in your areas of highest risk. Why might you be losing participants at these points? What are the participants’ barriers during these points in their education or training journey? Do not just guess; ask them! Ask both participants who are still in your program and those who have dropped out, if you can find them: *Are there processes that are confusing? Do participants understand what comes next and how to prepare for it? Do they know who to ask for help?*

Spend some time here to really understand the root cause of the problem. Enter these loss points in the box in Column C that corresponds to the correct lifecycle phase.

Column D: Potential Supports & Strategies - Knowing what you now know about your loss points, what are some potential strategies that can better support your participants and minimize your loss points? Consider using the provided resources in Step 3 (and others), but *also talk directly to your participants to find out what might aid in their success*. Note: Checking in with education and training partners or employers relevant to each phase in the lifecycle might illuminate additional participant barriers and challenges.

An example of a completed loss point tool is provided. Use this example to help create your own. Once completed, you can use potential strategies identified in this step to create your Action Plan (Step 4).

Capture Potential Participant Loss Points, Challenges, and Brainstorm Strategies *EXAMPLE*

	Column A: Number of Candidates/Participants	Column B: Loss Rate/Risk	Column C: Challenges & Loss Points	Column D: Potential Supports & Strategies
Outreach & Recruitment	350		Not enough people know about the opportunity	Use social media, partner with community-based organizations
Intake, Onramps & Enrollment	100	Loss Rate: 71% 100% - (Intake, Onramps & Enrollment/ Outreach & Recruitment)	People have to work while in training so are not interested	<i>Note: While this number seems high, it is not uncommon for this to be your highest number. There may be strategies you can implement to engage more participants</i>
Training/Education Program Progress	80	Loss Rate: 20% 100% - (Training Education Program Progress/Intake Onramps & Enrollment)	People don't come back after initial appointment	Implement a follow-up call procedure to check in on candidates
Completion & Certification	40	Loss Rate: 50% 100% - (Completion & Certification/Training Education Program Progress)	Participants are dropping out after week two	Have case manager in classroom in weeks one and two to understand participant barriers and provide support
Placement	30	Loss Rate: 25% 100% - (Placement/Completion & Certification)	Participants are not telling us if they're working	Offer incentives for successful placement, encouraging participants to contact with employment information
On-the-Job Retention	25	Loss Rate: 17% 100% - (On-the-Job Retention/Placement)	Some participants are being terminated during their probationary period	Implement employability skills training into program

Capture Potential Participant Loss Points, Challenges, and Brainstorm Strategies

	Column A: Data	Column B: Loss Rate/Risk	Column C: Challenges & Loss Points	Column D: Potential Supports & Strategies
Outreach & Recruitment	#		•	•
Intake, Onramps & Enrollment	#	Loss Rate: % 100% - (Intake, Onramps & Enrollment/ Outreach & Recruitment)	•	•
Training/Education Program Progress	#	Loss Rate: % 100% - (Training Education Program Progress/Intake Onramps & Enrollment)	•	•
Completion & Certification	#	Loss Rate: % 100% - (Completion & Certification/Training Education Program Progress)	•	•
Placement	#	Loss Rate: % 100% - (Placement/Completion & Certification)	•	•
On-the-Job Retention	#	Loss Rate: % 100% - (On-the-Job Retention/Placement)	•	•

Step 3: Explore Provided Resources and Promising Practices and Collect New Ones

Now that you've identified your greatest loss points, it is essential to develop your team's knowledge, capacity, and toolbox to better address participant challenges. Review this table to identify resources that may assist your strategy development during each phase of the participant support life cycle. Identifying resources and tools will assist your team as your transition to Step 4's action planning activities.

The table below provides resources across the Participant Support Lifecycle. It is important to note that the lifecycle is a continuum and resources may have impact across multiple phases.

Resources & Tools	
Outreach & Recruitment	WorkforceGPS Resources Participant Outreach and Recruitment H-1B Rural Healthcare – Recruitment, Enrollment and Retention Strategies for Training Participants Outreach, Recruitment & Placement of Transitioning Military Veterans and Spouses Enrollment-and-Co-Enrollment-Peer-to-Peer-Call H-1B TechHire Outreach and Recruitment Tip Sheet Other Resources Rural Healthcare Provider Retention Strategies from the Veteran's Administration
Intake, Onramps & Enrollment	Community College Research Center at Teachers College, Columbia University Resources Unpacking Program Enrollments and Completions with Equity in Mind Ask-Connect-Inspire-Plan: Reimagining Onboarding Framework Investing in Student Success at Community Colleges: Lessons from Research on Guided Pathways College Completion Network Resources Five Lessons to Consider When Supporting Returning Students Advising for College Success: Policies, Practices, and Programs That Support Students on the Path to College Completion WorkforceGPS Resources Employer & Workforce System Partnerships Participant Services

Resources & Tools

Training/Education Program Progress	What We Are Learning About Guided Pathways from Community College Research Center, Teachers College, Columbia University Gauging Engagement: Measuring Student Response to a Large-Scale College Advising Field Experiment from the College Completion Network Implementing Healthcare Career Pathway Training Programs in Rural Settings from the Tribal Health Profession Opportunity Grants (HPOG) 2.0 evaluation team
Completion & Certification	Advising for College Success: Next Steps for Policymakers, Practitioners, and Researchers from the College Completion Network Eight State Policy Recommendations That Support Postsecondary Credential Completion for Underserved Populations from Jobs for the Future Four Ways to Increase the Value of Short-Term Credentials: A Guide for Community Colleges from Jobs for the Future
Placement	The Next Phase of Placement Reform: Moving Toward Equity-Centered Practice from Center for the Analysis of Postsecondary Readiness, Teachers College, Columbia University WorkforceGPS Resources • Promising Practices for Participant Retention and Job Placement Tip Sheet • Employment, Placement and Participant Tracking • Job Placement Checklist
Retention Resources (any lifecycle step)	WorkforceGPS Resources • Tips to Enhance Participant Retention • Effective Strategies for Retention & Completion Webinars ○ Part 1 ○ Part 2

Step 4: Plan for Action

Review the Potential Supports & Strategies you identified in Step 2 and determine which of the potential solutions your team would like to move forward. You can then use this template to begin planning for those identified solutions. Most solutions will have more than one step, so you will want to identify each step and how you will accomplish each one. In the “Expected Outcome and Impact” column, consider how this solution will affect your grant’s overall goals, performance, or specific metrics and other outcomes. Finally, in the “Additional Supports Needed to Achieve Success” column, identify any support the team might need to ensure the success of this intervention. This may include communication with or support from partners or internal leaders, training for your team, increased capacity/staffing, or various external resources or funding sources. Add additional rows to the table for additional solutions and steps as needed.

ACTION PLANNING TEMPLATE					
SOLUTION <i>Enter proposed solution</i>	ACTION STEPS TO ACHIEVE <i>Identify each step needed</i>	RESPONSIBLE PARTY(IES) <i>Identify who is responsible for each step</i>	TIMELINE <i>Identify important milestones and the date by which the step will be accomplished</i>	EXPECTED OUTCOME AND IMPACT <i>What will the overall impact be on your grant?</i>	ADDITIONAL SUPPORTS NEEDED TO ACHIEVE SUCCESS <i>What else do you need to ensure this solution is successful?</i>
Example: Plan periodic case management onsite visits at training site to check in on participant barriers	Coordinate with training provider	Program Manager	By the end of next week	Help participants where they are before they drop out of class. Will impact training completion. Will enhance outcomes by building stronger relationships.	Need support of training institution and leadership buy-in to allow for offsite visits.
	Rearrange schedule to be available during class every Tuesday	Case Manager	By the end of next week		
	Ensure equipment (laptop, Wi-Fi, etc.) to handle needs onsite	Case Manager & IT	Within the next two weeks		

About

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