Participant Employee Information Tracking

Economic Mobility – Optimizing Program Design

Economic Mobility Optimize Program Design

1. **August 2024:** Tailoring your Success Program to your Focus Population
2. **October 16th 2024:** Developing and Improving your Logic Model
3. **December 11th 2024:** Designing a Quality Participant Worker Experience
4. **February 12 2025:** Building the Infrastructure: Staffing and Partnerships
5. **April 16 2025:** Establishing Policies for Participant Worker Development
6. **June 11 2025: Participant Worker Information Tracking Tools**

◆ **Optional Coaching Sessions**

Please type your name and organization

Please share an instance where you made a change because of data you saw.

Register for the CA RISE Summit in SF by June 30!

- **The CA RISE Summit is Sept 22-23 in San Francisco**
- **Please register up to two folks for the Summit by June 30**
- **Registration:** https://redf.qualtrics.com/jfe/form/SV_0kuDLAz7yyVz1hs
- **Hotel Block Booking:** You will be sent the link after you register through the survey

Last Chance for Responsive Technical Assistance!

A couple quick reminders:

1) If you are currently working with a consultant, this work must be completed by September 30, 2025
2) If you haven't started working with a consultant, this is the last call. All work must be started by June 30, 2025
3) Reach out to your relationship manager, Jamie or Will, ASAP

New Optional Workshop Series Posted to REDFWorkshop

California HR Upskilling Series

- Four Pre-Recorded Sessions:
  - Worktime, Rest Breaks and Meal
  - Pay Practices and Protocols
  - Policy Creation, Implementation, and Enforcement
  - Auditing for Compliance
- Coaching session: **Tuesday, July 8th from 11am-12:00pm PST**
- We recommend watching the virtual sessions prior to the coaching session.
- https://redfworkshop.org/government-programs-hub/ca-rise/optional-workshop-california-human-resource-upskilling-series/
- Please reach out to alee@redf.org if you don't have the meeting invite and he will get you added.

Financial Resources Toolkit

- Multiple Tools Available:
  - Resourcing Financial Management in ESEs: People, Process, and Technology Orientation to Financial Controls
  - Reading Financial Statements
  - Financial Health Metrics and Indicators for Your ESE
  - Guidance on Building & Improving Financial Processes and Procedures
  - Understanding and Implementing Double Bottom Line (DBL) Accounting
  - Budgeting, Variance Analysis, Forecasting
  - Managing Cash Flow and Liquidity
  - Capital Types for ESEs
- Coaching session: **To be scheduled for July or August**
- https://redfworkshop.org/government-programs-hub/ca-rise/resource-ese-financial-toolkit/

Interested in a Subscription to Honest Jobs?

Reentry Navigator is a reentry support tool designed specifically for workforce professionals serving justice-impacted individuals.

Powered by Honest Jobs, this tool helps returning citizens find fair-chance employers up to 7 times faster, while providing reentry professionals detailed insights into their clients' job search activities.

Reentry Navigator does this by showing you, and your client, how many people with convictions have been hired with each employer, and how likely you client is to be hired based on their unique conviction, before they apply. With access to a robust network of over 300,000 background-friendly job opportunities from more than 1,500 vetted fair-chance employers, Reentry Navigator enhances transparency, instills hope and confidence, and reduces rejection, leading to improved placement, retention, and earnings.

If you would like access to this tool for 6 months, please email korovecz@redf.org

Do you want an Impact Report for your ESE?

CA RISE ESE SNAPSHOT

Rise Up Industries

Breaking Cycles of Incarceration & Gang Involvement using a CNC Manufacturing Apprenticeship

In 2023, REDF and CalOSBA initiated the California Regional Initiative for Social Enterprise (CA RISE) to advance economic mobility and inclusion for individuals facing employment barriers. CA RISE delivers funding and technical assistance to Employment Social Enterprises (ESEs) statewide, fostering connections with public sector partners, training providers, and private sector employers to expand opportunities for underserved populations. This document provides a snapshot of a participating ESE.

QUICK STATS

Founded: 2013
Location: San Diego, CA
Industry Sector: Manufacturing
Leadership: Veteran-founded
CA RISE Grant Size: $150,000
 # Participant Employees (2023): 20

riseupindustries.org

"You can have a huge impact by giving gainful employment to a man or woman that came from prison, that came from gangs, that came from drugs. You can have a huge impact by giving them that opportunity."
- Mike Lucero, Program Graduate

ABOUT THE ESE

Rise Up Industries is a nonprofit organization that minimizes gang involvement by providing integrated gang prevention, gang intervention, and post-detention reentry services. The 18-month Reentry Program is modeled after Homeboy Industries and provides paid employment, job training, and wraparound support to formerly gang-involved individuals recently released from incarceration.

A key component of this program is the Machine Shop Social Enterprise, which trains and employs people in careers as Computer Numeric Control (CNC) machine operators that are trained to manufacture parts for various purposes such as advanced aerospace technology, submarine parts, etc. Apprentices participate in a registered apprenticeship where they receive employment, classroom training, and real-world experience on contract work providing them the skills needed for a well-paying career in the in-demand manufacturing industry.

STRATEGIC GROWTH USING CA RISE FUNDS

CA RISE funding is empowering Rise Up Industries (RUI) to expand the Machine Shop Social Enterprise and the CNC manufacturing apprenticeship's training capacity. RUI is using funds to:

- **Renovate a 40,400-square-foot facility** into a state-of-the-art training center to house the Reentry Program.
- **Purchase 8 new CNC machines** (bringing the total from 7 to 15) which doubles the machine shop's capacity.
- **Double the number of employees with barriers hired** from 20 to 40 participants per year.
- **Hire 3 additional training staff** to support training, operations, and production.

redf.org/ca-rise

WHY THIS MATTERS

- **Reduces Recidivism.** RUI maintains a 5% recidivism rate among its graduates compared to the CA average of 42% recidivism within 3 years of release.
- **Increases Employment.** 100% of RUI apprentices are hired upon graduation. RUI just secured a $2.2M U.S. Navy contract, creating more career paths for graduates into the Maritime Industrial Base as they help repair submarines.
- **Strengthens Families and Communities** by helping graduates become productive members of society who contribute to their families' well-being and the overall economy.
- **Breaks the Cycle of Gang Involvement.** RUI programs address the root causes of gang involvement, helping to break the cycle of violence and crime that often spans generations.
- **Supports the Regional Demand for CNC Machine Operators.** RUI provides training to fill the shortage in CNC Operators. To date, over 60 manufacturers nationwide have hired RUI graduates.

PARTICIPANT STORY

Meet the Participant: Ernie G.

Ernie was released from prison in 2017 after being incarcerated for nearly three decades, including 18 years in solitary confinement. Beyond the typical challenges of reentry, Ernie lacked many technical skills necessary to function in modern society. He shared, *"I didn't know how to use computers. I didn't know what a debit card was. I didn't know what Google was."*

He enrolled in Rise Up Industry's 18-month Reentry Program that used a holistic approach to reentry to teach him much more than CNC machining training. The technical training he received prepared him to thrive at work, but the compassion from staff members helped him stay in the program and address his wraparound needs. Ernie shared, "What Rise Up did was allow us to get help, have mentors, have people that would sit down and talk to us and not give us negative feedback, but give us positive feedback." Counseling caseworkers helped him secure a social security number—something he hadn't had for decades—and offered opportunities to work through other challenges in therapy groups.

Ernie successfully graduated from Rise Up Industries with a CNC machining certificate and the soft skills to succeed. Rise Up Industries had an immediate and substantial impact on Ernie's economic well-being. He secured a job in the aerospace industry using his CNC machining skills and quickly advanced within the company, earning four raises in less than two years.

A few years later, Rise Up Industries invited him back, this time as a Production Manager. Today, Ernie is fulfilled in the job that lets him help others who are reentering. His advice for others who are in the midst of their own transformation is simple but profound:

"Invest in yourself. You're going to learn here and what you're going to leave here with is more than just a trade."

We have a graphic designer who can create an impact report like this for any ESE that wants one, as part of your CA RISE participation.

Put your ESE name in the chat now if you'd like us to make one for you by the end of the year.

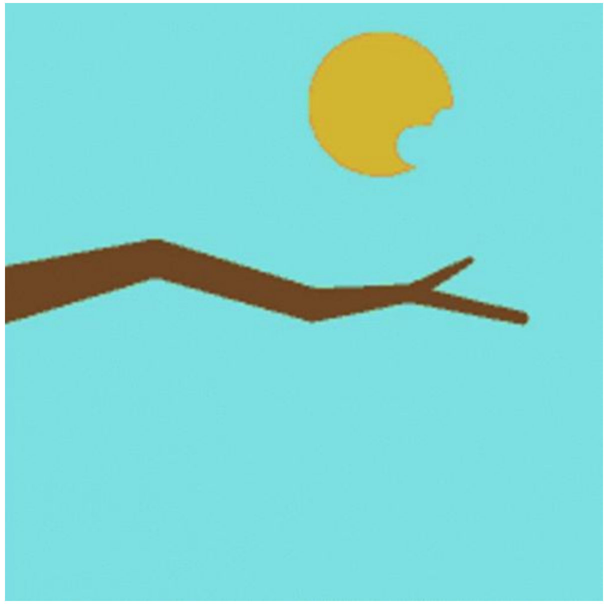
SESSION OBJECTIVES:

- ❑ Continue to strengthen peer connections
- ❑ Define and start to create a data strategy for participant worker information
- ❑ Introduce analysis, reporting, and action planning
- ❑ Create space for raising questions, but be comfortable with not be able to resolve all questions today

Why These Objectives?

Robust participant employee data enables us to:

Provide tailored employee success services
(Demographic & intake data)



Learn and iterate program design
(Employee experience and outcome data)

Demonstrate impact to key stakeholders like BoD and funders
(outcome data)

How are we Going to Accomplish These Objectives?

We will begin to create a **Strategy for Data** that allows you to communicate impacts on participant workers and inform changes to your program for a better participant worker experience and impact.

Data Strategy = Allows us to collect, analyze, report, and take action on the information we gather from and about our participant workers.

How are we Going to Accomplish These Objectives?

Data Strategy Includes:

- ❑ **Strategic Direction:** What questions are you trying to answer through data?
- ❑ **Data Collection Plan:** What data do we need to collect? When do we collect the data and how often?
- ❑ **Data Collection Details:** Who will collect data, how will we collect the data, and what technology will we use to collect and store data?
- ❑ **Analysis Plan:** How will we take data from points to findings?
- ❑ **Reporting and Action Planning:** How do we report our findings? How do we take actions based on findings from our data?

Note: We are not working on creating a plan for a formal research project that an outside consultant might do. This is your ongoing data collection and review process.

Before we dive in how confident are you that the data you are already collecting about participant workers tells a compelling impact story and provides enough context to make program design changes?

1 - Not confident we are collecting the right data to tell our impact story and inform program changes

5 - Super confident we've got this right!

Strategic Direction:

What questions are you trying to answer with data?

Data collection, analysis, and reporting should be guided by questions that you and other stakeholders want answers to and that can inform changes to the program or participant worker experience.

These questions can be as large as:
"What impact has our program made on participant workers over the last three years"

to as narrow as:
"Is a certain demographic of participant worker having worse outcomes compared to others in our program?" "At what points in the program do participants commonly drop out?" "How much do participants earn after graduating from my ESE?"

Note: *You can use your logic model, theory of change, strategic plan, or participant worker experience map to guide development of these questions*

Data Collection Plan:
WHAT data do we need to collect?

Demographic Data

Descriptive information about your participants needed to track eligibility and employee support needs.

Examples: Age range, housing status, financial assistance employees are already receiving

+

Experience Data

Information about how participant workers feel about their work and the program.

Example: Employee engagement survey found 50% of employees enjoy their job

+

Outcomes Data

Data that measure the quality of your work with participant workers. These are the impacts you will share about your program.

Example: 80% of our graduates have increased their social capital.

Participant Employee Information

Data Collection Plan:

WHEN do we collect the data?

You can use this worksheet to help answer the question WHEN

Season of the journey	Step of the journey	Length of time	Activities during this step	Triggers for the next step	What information do I need to track here?
Stabilization- Emphasis on personal growth and building commitment to a job	Intake	1 hour	• Attend monthly info sessions • Complete the application	Participant self-selects to attend orientation	
	Orientation	1 week	• Weeklong orientation to the job and program	Anyone who completes orientation is offered employment	
	Apprentice Level 1	4-6 months	• Up to 20 hours/week paid shift work • Up to 5 hours/week paid personal development work • Level 1 training across 3 stations	Passing grade on all Level 1 knowledge and skill assessments results in progression to Apprentice Level 2	
Professional Growth- Emphasis on rapid learning and skill progression	Apprentice Level 2	2-4 months	• Up to 25 hours/week paid shift work • Up to 10 hours/week paid personal development work • Level 2 training across 3 stations	Passing grade on all Level 2 knowledge and skill assessments results in progression to Apprentice Level 3	
	Apprentice Level 3	2-4 months	• Up to 30 hours/week paid shift work • Up to 10 hours/week paid personal development work • Level 3 training across 5 stations	Passing grade on all Level 3 knowledge and skill assessments results in successful graduation or transition to Shift Lead	

Your Turn - Individual Reflection

Write down:

1. Questions you have or questions stakeholders have asked that you would like answered by data. You can also think of the ideal impact story you'd be able to tell and support with data.

2. The data points you would want to better understand about your program - is it demographic, experience, outcome related, or a combination?

3. 1-3 areas of strength and 1-3 areas of improvement in what data you are collecting and when you are collecting it.

Note: *You can use your worksheet from the Participant Worker Experience workshop, your Logic Model, a strategic plan, or a theory of change to connect program activities with data.*

CA RISE

Breakout #1

Discuss with your Group:

- Questions you would like to answer with data
- Areas of Strength in Data Collection
- Areas for Improvement in Data Collection

Share out

How are we Going to Accomplish These Objectives?

Data Strategy Includes:

- ✓ **Strategic Direction:** What questions are you trying to answer through data?
- ✓ **Data Collection Plan:** What data do we need to collect? When do we collect the data?
- ❏ **Data Collection Details:** Who will collect data? How will we collect the data? What technology will we use to collect and store data?
- ❏ **Analysis Plan:** How will we take data from points to findings?
- ❏ **Reporting and Action Planning:** How do we report our findings? How do we take actions based on findings from our data?

Data Collection Details:

WHO will collect data? HOW will we collect it? WHAT technology will we use?

People

- Who is deciding what gets collected and when?
- Who is collecting the data?
- Is data collection responsibilities listed in Job Descriptions?
- What stakeholders need to be involved in analysis, reporting, and action planning?

Process

- What are the steps required to collect data?
- Is the data collection process clear to all stakeholders involved?
- How is data checked for quality?
- Are the steps and timeframes for analysis, reporting and action planning clearly defined and followed?

Technology

- Where is data stored?
- What tools are used to collect, analyze, and report data?
- How many tools do you use (e.g., survey monkey, salesforce, google sheets) and are they connected?
- Does everyone use the same tools to collect, analyze, and report data?

Data Collection Details:

WHO will collect data?

People

Consider using a tool to help outline participant employee data responsibilities:

- DARE is one framework created by McKinsey & Company that focuses on four roles:
    - **Deciders** “We make the decisions”
    - **Advisors** “We have a voice in the discussion”
    - **Recommenders** “We explore and identify the options”
    - **Execution stakeholders** “We carry out the decisions”
- However you choose to organize your decision-making (RACI and DARCI are common), you should have **clear agreements about roles, responsibilities and evaluation for internal and external stakeholders.**

Data Collection Details:

HOW will we collect data?

Process

In addition to considering the questions, your data collection process should include:

01	Data Storage	Conduct a preliminary high-level review of what data you're storing, how you're currently storing data, and what kinds of data may be particularly sensitive.
02	Data Accessibility	In conjunction with the above, evaluate whether team members and staff who perform certain functions have reasonable access to the data they need to successfully carry out those functions.
03	Data Security	For data that is critical to the organization's functioning make frequent backups or use cloud-based storage solutions. For any personally identifiable or sensitive information, adopt proper privacy protocols

Data Collection Details:

WHAT technology will we use?

Technology

SYSTEMS SNAPSHOT

4.95 Years in Use

Satisfaction Levels (1-5 scale)

3.16 Overall Satisfaction

3.09 Ease of Use

3.22 Meeting Org. Needs

System	Frequency*	Ease of Use	Overall Satisfaction	Meeting Org. Needs	Challenges
Excel	28%	3.2	3.0	3.0	Manual updating, overall functionality/flexibility.
Salesforce	26%	3.5	3.8	3.8	User interface, learning curve/maintenance of customizations, cumbersome.
Apricot	8%	3.0	3.7	3.3	Maintenance, report building, costly, doesn't meet growing needs.
CaseWorthy	5%	4.0	4.0	4.0	No challenges highlighted.
ServicePoint	5%	3.5	3.5	3.5	No challenges highlighted.
Other	44%	3.2	3.2	3.4	Functionality, clunkiness, onboarding time (ClickUp, Filemaker Pro, CorpsNet, etc.).

Your Turn - Individual Reflection

Write down:

1. The area or areas you think could use some attention to improve data collection across people, process, and technology?

2. The areas you think you are currently crushing in terms of data collection across people, process, and technology?

3. Questions you have about the framework and/or gaps you see in thinking about your data collection details?

Breakout #2

Discuss:

- Areas of improvement for data collection details
- Areas of strength for data collection details
- Questions and/or reflections you have

How are we Going to Accomplish These Objectives?

Data Strategy Includes:

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Analysis Plan

HOW will we take data from points to findings?

Consider...

- How do you get the data get ready to be analyzed (e.g., pulling in all survey data, case management data, etc.)?
- Do you need to include any benchmarks or external sources in any of the analysis you would like to do (e.g., recidivism rate at the state level, last year's program graduation was 75% and this year is 80%)?
- How often do you need to analyze data (e.g., quarterly, monthly, yearly)?
- Who is running the analysis and is the process documented?

What else should be considered?

Reporting and Action Planning

HOW do we report our findings? How do we take actions based on findings from our data?

Consider...

- Who needs to see the data and in what format can it best be consumed by that stakeholder group (e.g., dashboard for internal use, Powerpoint for the Board, Impact Report for external funders in a PDF)?
- How does reporting link to actions that can be taken to improve participant worker outcomes and experience?
- How often should reporting and action planning take place for participant worker data (e.g., quarterly, yearly)?
- Who should be involved in this process of understanding the data findings and converting those findings into actions?

What else should be considered?

Example of Data Collection, Analysis, and Reporting

View our sample data tracker and associated dashboard.
You can modify it to match your outputs and outcomes.
The formulas in the "dashboard" sheet are set up to pull and aggregate data from the "tracker."

Last Name	First Name	Date of Open House	Attended Open House	Date of Enrollment	Programs Enrolled	Level of ESL upon entry	Date of ESL progression	Level of progression on that date	Certifications Earned	Promotions Earned	Gain Leadership and training experience?	Number of professional connections	Date of measuring professional connections	Hourly wage	Date of hourly wage

How are we Going to Accomplish These Objectives?

Data Strategy Includes:

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Finally: Please reflect

When we have better participant employee information, what exactly will change?

SESSION OBJECTIVES:

- ✓ Build peer connections
- ✓ Define and start to create a data strategy for participant worker information
- ✓ Introdice analysis, reporting, and action planning
- ✓ Create space for raising questions, but be comfortable with not be able to resolve all questions today
- ✓ Create space for raising questions, but be comfortable with not be able to resolve all questions today

Commitments

Based on everything you learned today what are 1 to 2 commitments you can make? For example:

- Clarify the type of data we will collect at each stage of the employee journey.
- Identify a new data collection tool (survey, focus group).
- Write out our data collection plan.

What’s next?

- Additional resources will be posted on REDFWorkshop
- Make progress on commitments from last slide!
- The last Coaching hours will be hosted on Wednesday July 16th from 11am-12:30 PST
- Email you Relationship Manager with any questions you have!

Resources

New Toolkits:

Demographic Data – Descriptive information about your participants needed to track eligibility and employee support needs.
Intake Toolkit

Experience Data– The results of employee feedback surveys.
Employee Survey Toolkit

Outcome Data– Metrics from various sources that measure the quality of your work with participant workers.
Logic Model Toolkit

Feedback Survey

Please take a few minutes to fill out our Survey on this session.

https://bit.ly/EMTOptimizeAll

This feedback helps us improve your experience and plan adjustments to make moving forward.

Thank you!

APPENDIX

Data Collection Plan:
Participant Employee Information

- ❑ **Data collection plan: what data do we need and when?**

When?

The data you collect varies at each stage of the employee journey.

Data Collection Plan:
Participant Employee Information

- ❏ **Data collection plan: what data do we need and when?**

What data do we need?

KPIs exist here:

quantitative or qualitative measures commonly used for assessing, comparing, and tracking performance or productivity in an organization

Experience Data– The results of employee feedback surveys.

Outcome Data– Metrics from various sources that measure the quality of your work with participant workers.