



Participant Worker Information Tracking- Coaching Session

Economic Mobility - Optimizing Program Design



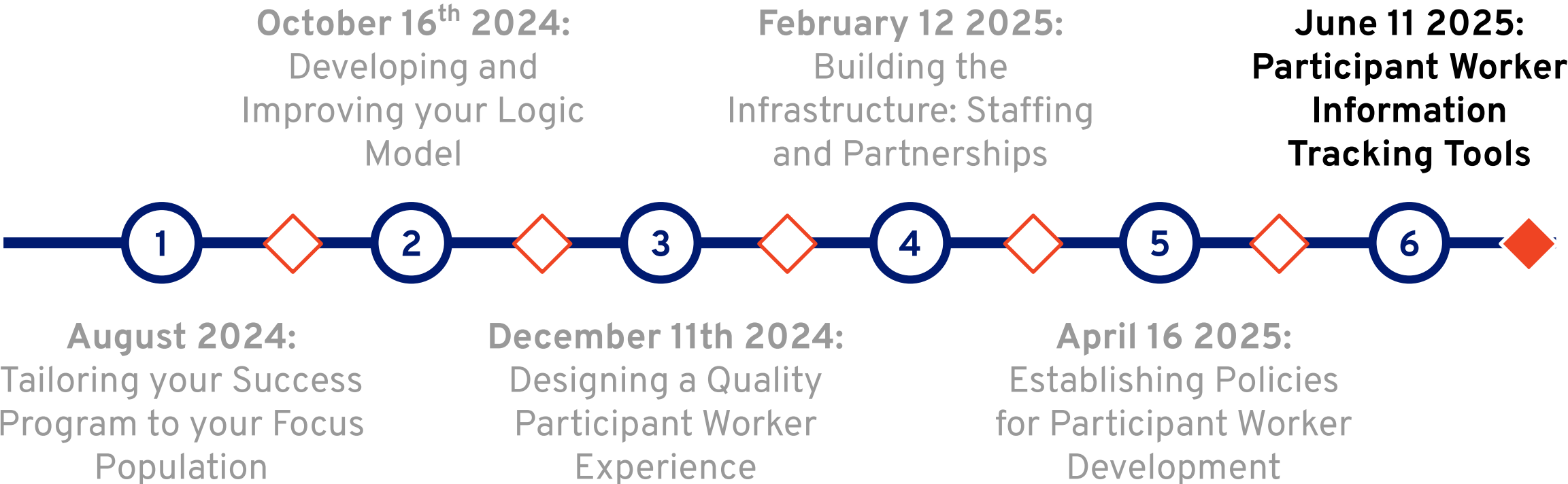
In the chat please fill out the rest of this sentence:

Zooming into today's session, I am feeling...

Community Standards

- **Stay engaged**
- **Listen to understand**
- **Take space, make space**
- **Nobody knows everything, but together we know a lot**
- **Challenge assumptions**
- **Expect and accept non-closure**
- **Center Participant Workers**
- **Embrace Diversity in All of its Forms**
- **Create a Safer Space for Sharing / Refrain from Attribution**

Economic Mobility Optimize Program Design



 **Today's Optional Coaching Session**



Session Review

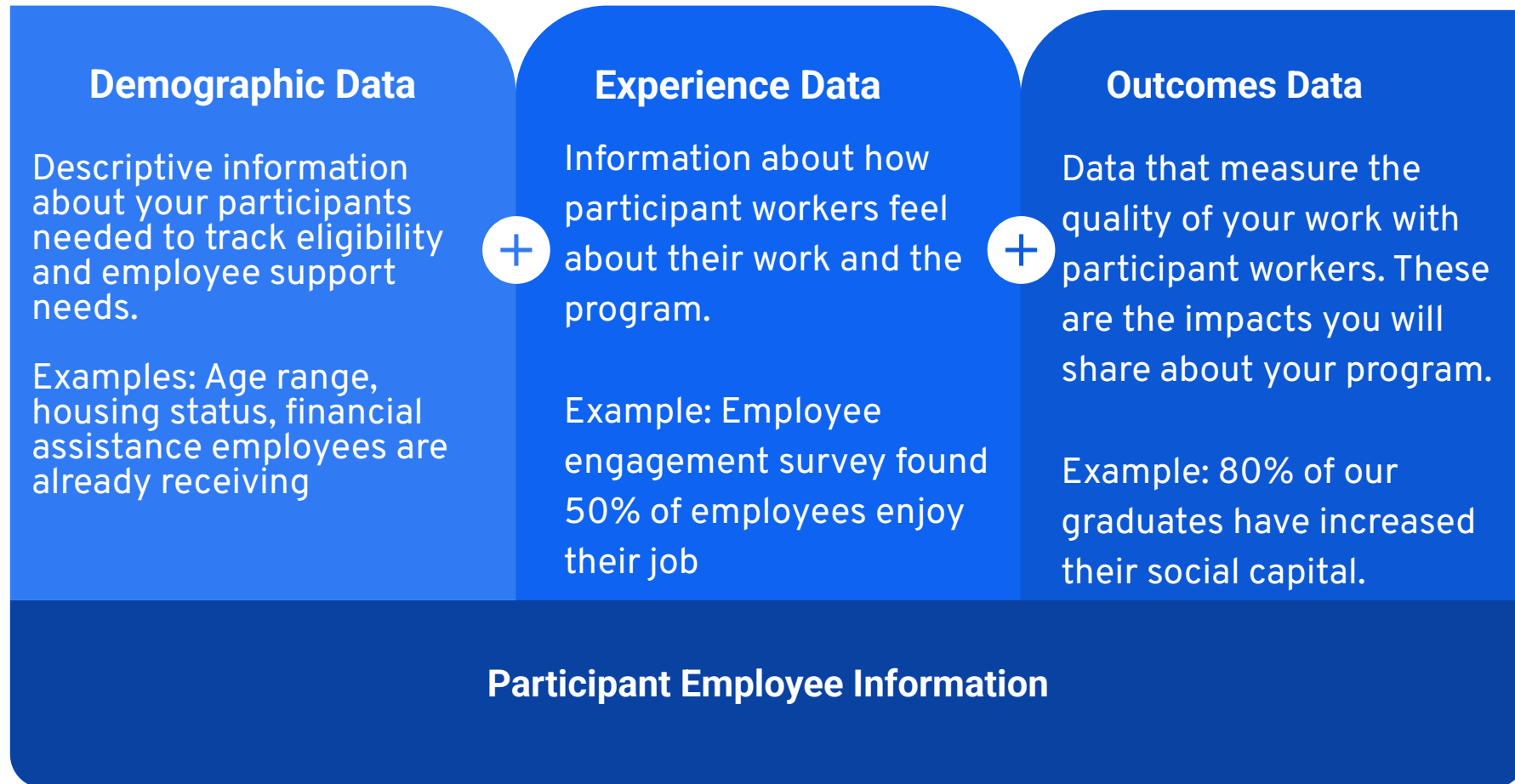
Data Strategy

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 Plan:

WHAT data do we need to collect?



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	<ul style="list-style-type: none"> Attend monthly info sessions Complete the application 	Participant self-selects to attend orientation	
	Orientation	1 week	<ul style="list-style-type: none"> Weeklong orientation to the job and program 	Anyone who completes orientation is offered employment	
	Apprentice Level 1	4-6 months	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	

Data Collection Plan:

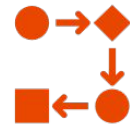
WHO will collect data? **HOW** will we collect it?

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?

Collecting data during a program

Large Group Discussion

What is the ideal ratio between outcome data you collect during the program and data you collect from graduates of your programs?

- Ex: 75% of our data on an individual comes to us during the program, 25% after they complete.

Large Group Discussion

Example outcomes you can collect while someone is in your program:

- 75% of our program participants increase their earning power.
- 60% of our program participants increase their capacity to aspire.
- 70% of our participants increased their social capital.
 - Measured by comparing scores at entry and exit.

Individual Reflection

Consider...

- What are the transformational changes you see in your participant employees between entry and exit?
- What are some outcome-level metrics that you can collect while someone is still in your program instead of after they have left your program fully?

Breakout Room

Discuss your responses to...

- What are the transformational changes you see in your participant employees between entry and exit?
- What are some outcome-level metrics that you can collect while someone is still in your program instead of after they have left your program fully?

Collecting data after the program

Example metrics you can collect after someone graduates from your program:

- 75% of our graduates retained employment after 90 days.
- 60% of our program participants reduced reliance on public benefits.
- 70% of our participants benefited from increased social capital.

-Measured by collecting follow-up data with alumni.

Individual Reflection

- What types of data do you try to collect from individual after they have left your program?
- What engagement tools do you use for that data collection? Does it work?
- What would make alumni data collection easier?
- What are some ideas you have for how you might improve data collection from individuals who have exited your program?

Breakout Rooms

- What types of data do you try to collect from individual after they have left your program?
- What engagement tools do you use for that data collection? Does it work?
- What would make alumni data collection easier?
- What are some ideas you have for how you might improve data collection from individuals who have exited your program?
- When will you collect the bulk of your program data?

Collecting and Reviewing Data

Dashboard

[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.”

Basic Information					Employment Information					Certifications and Degrees					Legal Barriers Expunged
Last Name	First Name	Date of Enrollment	Programs Enrolled	Attendance Rate	Employed with us?	Date of Employment	Hourly wage	Enrolled in Benefits?	Promotions Earned	Certifications Earned	Date of Certification	Degrees Completed	Date of Degree	GPA	
		1/3/24	Pipeline	50.00%	Yes ▼		\$14.50	Yes ▼	Apprentice Level 2	Paralegal	1/30/24			2	Option 2 Option 1
		1/5/24	Fellows	25.00%	No ▼		\$14.50	Yes ▼		Serv Safe	1/16/25			3.5	Option 1
		2/15/25	Fellows	10.00%	Yes ▼		\$14.50	Yes ▼		Serv Safe	3/10/25			4	
		2/21/25	Pipeline	30.00%	▼			No ▼		Paralegal	3/20/25	JD	3/15/26	3.6	
					▼			▼							
					▼			▼							
					▼			▼							

In the chat

What is the change you wish to make to how data is collected, analyzed, or communicated?

Please complete this sentence:

**Before the in person Summit in
September I will . . .**

Resources to Remember

- Logic Model Toolkit
- Intake Toolkit
- Data Tracking: Alternative Metrics Toolkit
- Data Tracker Template

What's next?

- Additional resources will be posted on REDFWorkshop
- Email you Relationship Manager with any questions you have
- We'll see you in September at the Summit!



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.

