# WORKFORCE BENCHMARKING NETWORK
# WORKBOOK

CSW
CORPORATION FOR A SKILLED WORKFORCE

Workforce
Benchmarking
Network

## About Corporation for a Skilled Workforce (CSW)

CSW is a national workforce policy and systems change nonprofit that partners with government, business, and community leaders to develop good jobs and the skilled workers to fill them. For 30 years, CSW has provided high impact strategic planning, program development, and evaluation assistance to state, regional, and local partners. We catalyze change in educational and labor market systems, policies, and practices to increase economic mobility, particularly for people of color and others historically excluded from success. We offer a variety of services across our five strategy areas:

- **+** **Competencies & Credentials**

- **+** **Federal, State, & Local Systems Change**

- **+** **Improving Practices & Outcomes**

- **+** **Research & Evaluation**

- **+** **Trauma & Resilience at Work**

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## About the Workforce Benchmarking Network (WBN)

The Workforce Benchmarking Network (WBN) connects community-based organizations, public and private funders, and other intermediaries providing workforce development services around the country to support better and more equitable results for job seekers, employers, and communities. The objectives of the WBN Equity Cohort are to:

· Improve data access and quality
· Build organizational capacity to use disaggregated data for continuous improvement and advancing racial equity in program outcomes
· Benchmark programs against similar programs nationally
· Equip community-based organizations with the skills & tools to advance their work, measure & articulate impact
· Identify program designs and interventions that best support workers of color succeed in the labor market

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## 2025 Cohort Schedule

| Date | Time | Topic |
|---|---|---|
| Jan. 17-31, 2025 | | Virtual Site Visit (90 min. per organization) |
| Feb. 5, 2025 | 9:00 AM to 4:00 PM | Making Metrics Matter: Intro to Data & Equity |
| Mar. 5, 2025 | 9:00 AM to 4:00 PM | Peer Forum 1 (In-Person) |
| Apr. 1 – 20, 2025 | | TA- Coaching Calls (1 hr. per organization) |
| May 2, 2025 | 9:00 AM to 4:00 PM | Peer Forum 2 (In-Person) |
| Jun. 5, 2025 | 9:00 AM to 4:00 PM | Peer Forum 3 (In-Person) |
| Jun. 24, 2025 | 10:00 AM to 11:00 AM | National Survey Webinar |
| Jun. 25 – Aug. 15, 2025 | | National Survey Office Hours (as needed) |
| Sept. 1, 2025 | | Complete WBN National Survey |
| Sept. 18, 2025 | 10:00 AM to 12:00 PM | Understanding Your Survey Reports Webinar |
| Sept. 19 – Oct. 15, 2025 | | TA- Coaching Calls (1 hr. per organization) |
| October 15, 2025 | | Cohort Evaluation |

# Basic Definitions

| | |
|---|---|
| **Ally** | Someone who commits to reducing their complicity or collusion in oppression of those groups and invest in strengthening their knowledge and awareness of oppression. |
| **Discrimination** | The unequal treatment of members of various groups based on race, gender, social class, sexual orientation, physical ability, religion and other categories. |
| **Diversity** | Diversity includes all the ways in which people differ, and it encompasses all the different characteristics that make one individual or group different from another. |
| **Implicit Bias** | Also known as unconscious or hidden bias, implicit biases are negative associations that people unknowingly hold. They are expressed automatically, without conscious awareness. |
| **Institutional Racism** | How institutional policies and practices create different outcomes for different racial groups. The institutional policies may never mention any racial group, but their effect is to create advantages for whites and oppression and disadvantage for people from groups classified as people of color. |
| **Intersectionality** | A framework for conceptualizing a person, group of people, or social problem as affected by a number of discriminations and disadvantages. It takes into account people's overlapping identities and experiences to understand the complexity of prejudices they face. |
| **Microaggression** | Everyday verbal, nonverbal, and environmental slights, snubs, or insults, whether intentional or unintentional, which communicate hostile, derogatory, or negative messages to target persons based solely upon their marginalized group membership. |
| **Prejudice** | A pre-judgment or unjustifiable, and usually negative, attitude of one type of individual or group toward another group and its members. Such negative attitudes are typically based on unsupported generalizations (or stereotypes) that deny the right of individual members of certain groups to be recognized and treated as individuals with individual characteristics. |
| **Racism** | A different from racial prejudice, hatred, or discrimination. Racism involves one group having the power to carry out systematic discrimination through the institutional policies and practices of the society and by shaping the cultural beliefs and values that support those racist policies and practices. |
| **Stereotype** | Exaggerated or distorted beliefs about the characteristics, attributes, and behaviors of individuals and communities that categorize individuals and communities into singular, pejorative terms. |

# Inclusive Language: Skills, Income, & Socioeconomic

| Term | Guidance | Alternative/Example |
|---|---|---|
| **Low-skill** | Do not use to describe people. Whenever possible, avoid using to describe jobs. OK to use for jobs when no other term works in the content's context. | Jobs that don't require post-secondary education or training |
| **Low-wage** | Do not use to describe people. Do not use as a proxy for low-skill. OK to use to describe job earnings. Include definition with wage range you're referring to. | people who work in low-wage jobs; "In this report, we use "low-wage" to refer to people earning $15 per hour or less." |
| **Low income** | Do not use to describe people. Do not use as a proxy for low-skill. OK to use to describe job earnings. Include a definition with income range you're referring to. | children from low-income households; people in jobs that do not pay family-supporting wages |
| **Poverty** | Avoid, when possible; poverty has multiple definitions. OK to use to describe a person's or community's income level, if using the federal gov. definition. | Children living in poverty; people experiencing poverty; families without sufficient income for basic needs |
| **Disadvantaged; Marginalized** | Do not use as shorthand to describe people, such as: disadvantaged youth. Use as a verb, calling out the actors and the harm. | Policies that disadvantage Black people; workforce development systems that marginalize people of color |
| **Underrepresented** | Do not use as shorthand to describe people, such as: underrepresented students | Students from populations that are underrepresented in higher education; workers from populations that have been explicitly or implicitly excluded from a profession |
| **Under-served; Under resourced** | Do not use as shorthand to describe people, such as: underserved young people | Communities that have not received equitable investments from the government or the private sector |

# Affirmative & Negative Terms

| AFFIRMATIVE | NEGATIVE |
|---|---|
| **People with disabilities** | The handicapped, the disabled |
| **Person with a disability** | Impaired, invalid, crippled, afflicted |
| **Person without a disability** | Normal, healthy, able-bodied |
| **Successful, productive** | Courageous, inspirational |
| **Has a traumatic brain injury** | Is brain damaged |
| **Has paraplegia** | Is paraplegic |
| **People who are blind** | The blind |
| **Person who is deaf** | Deaf and dumb |
| **Child has autism** | Autistic child |
| **Has epilepsy** | Is epileptic |
| **Person with intellectual, cognitive disability** | Retarded, slow, idiot, moron |
| **Person with mental illness** | Crazy, insane, nuts, psycho |
| **Person of short stature; little person** | Dwarf, midget |
| **Has a congenital disability** | Has a birth defect |
| **Person who uses a wheelchair** | Wheelchair bound |

# Becoming an Anti-Racist Multicultural Organization

**MONOCULTURAL ==> MULTICULTURAL ==> ANTI-RACIST ==> ANTI-RACIST MULTICULTURAL**

*Racial and Cultural Differences Seen as Deficits ==> Tolerant of Racial and Cultural Differences ==> Racial and Cultural Differences Seen as Assets*

| Exclusive — An Exclusionary Institution | 2. Passive — A "Club" Institution | 3. Symbolic Change — A Compliance Organization | 4. Identity Change — An Affirming Institution | 5. Structural Change — A Transforming Institution | 6. Fully Inclusive Anti-Racist Multicultural Organization in a Transformed Society |
|---|---|---|---|---|---|
| • Intentionally and publicly excludes or segregates African Americans, Native Americans, Latinos, and Asian Americans | • Tolerant of a limited number of "token" People of Color and members from other social identify groups allowed in with "proper" perspective and credentials. | • Makes official policy pronouncements regarding multicultural diversity | • Growing understanding of racism as barrier to effective diversity | • Commits to process of intentional institutional restructuring, based upon anti-racist analysis and identity | • Future vision of an institution and wider community that has overcome systemic racism and all other forms of oppression. |
| • Intentionally and publicly enforces the racist status quo throughout institution | • May still secretly limit or exclude People of Color in contradiction to public policies | • Sees itself as "non-racist" institution with open doors to People of Color | • Develops analysis of systemic racism | • Audits and restructures all aspects of institutional life to ensure full participation of People of Color, including their world-view, culture and lifestyles | • Institution's life reflects full participation and shared power with diverse racial, cultural and economic groups in determining its mission, structure, constituency, policies and practices |
| • Institutionalization of racism includes formal policies and practices, teachings, and decision making on all levels | • Continues to intentionally maintain white power and privilege through its formal policies and practices, teachings, and decision making on all levels of institutional life | • Carries out intentional inclusiveness efforts, recruiting "someone of color" on committees or office staff | • Sponsors programs of anti-racism training | • Implements structures, policies and practices with inclusive decision making and other forms of power sharing on all levels of the institutions life and work | • Members across all identity groups are full participants in decisions that shape the institution, and inclusion of diverse cultures, lifestyles, and interest |
| • Usually has similar intentional policies and practices toward other socially oppressed groups such as women, gays and lesbians, Third World citizens, etc. | • Often declares, "We don't have a problem." | • Expanding view of diversity includes other socially oppressed groups | • New consciousness of institutionalized white power and privilege | • Commits to struggle to dismantle racism in the wider community, and builds clear lines of accountability to racially oppressed communities | • A sense of restored community and mutual caring |
| • Openly maintains the dominant group's power and privilege | • Monocultural norms, policies and procedures of dominant culture viewed as the "right" way" business as usual" | *But...* | • Develops intentional identity as an "anti-racist" institution | • Anti-racist multicultural diversity becomes an institutionalized asset | • Allies with others in combating all forms of social oppression |
| | • Engages issues of diversity and social justice only on club member's terms and within their comfort zone. | • "Not those who make waves" | • Begins to develop accountability to racially oppressed communities | • Redefines and rebuilds all relationships and activities in society, based on anti-racist commitments | • Actively works in larger communities (regional, national, global) to eliminate all forms of oppression and to create multicultural organizations. |
| | | • Little or no contextual change in culture, policies, and decision making | • Increasing commitment to dismantle racism and eliminate inherent white advantage | | |
| | | • Is still relatively unaware of continuing patterns of privilege, paternalism and control | • Actively recruits and promotes members of groups have been historically denied access and opportunity | | |
| | | • Token placements in staff positions: must assimilate into organizational culture | *But...* | | |
| | | | • Institutional structures and culture that maintain white power and privilege still intact and relatively untouched | | |

# Using Data for Learning, Continuous Improvement & More Equitable Results

## ENGAGE STAFF

- **Be internal** "data for learning" champions, both in the overall organization and in programs. Without intentional, persistent efforts by one or more champions, it won't happen.
- **Engage staff with a variety of perspectives** to work on improvement goals in teams. Elevate voices and needs of underrepresented groups. A shared improvement target builds energy and buy-in and increases cross-function communication.
- Even if goals are not yet met, **celebrate incremental progress!** Use staff meetings to connect results to the various contributions of staff who made them possible.

## DIG DEEPER

- **Jump to questions, not conclusions about data reports**, to tease out the story behind the data and to help staff develop their "inquisitive mind." Mantra: "there are no stupid questions."
- **"What's your hunch? What are Influencing Factors?"** Use continuous improvement tools (e.g., influencing factors/fishbone) to dive deeper into challenges across departments or functions.
- **Get to Root Causes.** Ask "why" multiple times to understand systems-level causes of inequitable impacts.
- **Engage the constituent/community voice**. Get regular input from participants, employers, partners, and staff.

## FOCUS ON QUALITY

- **See spreadsheets as a useful interim tool** that can help build staff confidence in using data and can help ensure data quality while transitioning to a new database or refining a current one.
- **Try creative data quality strategies**. For example, consider "data and pizza Fridays" or some other regular ways to keep data updated. Make smart use of interns or others to help where appropriate.

## KEEP DATA VISIBLE

- **Disaggregate to tell the real story**. Analyze and share data to show gaps by race, gender, and other factors.
- **Make outcome data visible and visually compelling**. Keep dashboards about progress on target outcome and milestone measures visible on computer screens, meeting agendas, etc.
- **Integrate "data time" into every meeting** to help staff better understand what's happening in a particular area, celebrate progress or identify a question or hunch for further exploration.
- **Make data reports useful for managers and frontline staff**. Ask staff what data they need to do their jobs more easily, explore a hunch, or just have the "big picture". And then help them get what they need!

## MOVE FROM DATA TO ACTION

- **Use data to know "where's the leak?"** and focus there for improvement. At what points are people dropping out or not being successful? Which subgroups struggle more?
- **Target a few key milestones at a time for improvement** – those that can have significant impact on the big outcomes. Design strategies to address root causes. Don't try to do it all at once!
- **Model the "fail fast and learn" continuous improvement approach** (Plan-Do-Study-Act), creating a safe space for staff to acknowledge what's not working, reflect on lessons learned and risk trying new "change ideas." What can we do "by next Tuesday"?

# Continuous Improvement Process Model



Data & Feedback: Inform Hunches

Change Ideas: Effective Practices & Strategies for Racial Equity

Hunches: Factors & Root Causes

Implementation: What can we do by next Tuesday?

Desired Results: Focus Measure to Improve

Milestones: What are key progress measures?

Where's the "leak" in our processes?

Outcomes: What "big goal" results matter to us?

What matters to participants?

How do we define?

How are we doing?

What does disaggregated data tell us?

# Dashboard Indicators: Long-term Outcomes that Matter

What long-term outcome measures will tell us that we are accomplishing the customer "changes" (in knowledge, attitudes, behavior, status or condition) needed to realize our mission and accomplish increased economic mobility for constituents? Consider a balanced scorecard of indicators that include equity-related goals, other customer goals, funding sustainability and staffing-related goals.

## EXAMPLES:

**GOAL:** Increase participant job placement

**How to Measure/Define?** Unemployed persons enrolled in the program during current FY who are placed in positions

**Equity Data Disaggregation:** Site

**Targets (#, %):** 75% of uptown site participants are placed

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**GOAL:** Increase program completion

**How to Measure/Define?** Those enrolled in a cycle who complete training requirements

**Equity Data Disaggregation:** Gender

**Targets (#, %):** X% of enrolled women complete training

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**GOAL:** Increase long-term engagement

**How to Measure/Define?** Program completers who make at least 1 contact with staff each quarter for 1 year

**Equity Data Disaggregation:** Race & gender

**Targets (#, %)**: 50% increase in engagement by African American male completers

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**GOAL:** Increase college enrollment

**How to Measure/Define?** Interested young adults age 18-24 from current year who are enrolled in college

**Equity Data Disaggregation:** Income

**Targets (#, %):** 20% increase of students living below the poverty line

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**GOAL:** Increase job retention

**How to Measure/Define?** Continuous employment for 90 days

**Equity Data Disaggregation:** Race

**Targets (#, %):** Overall 10% increase in rate, with 25% increase for People of Color

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**GOAL:** Increase # enrollment services

**How to Measure/Define?** Those who complete recruitment process and complete at least X days of program services

**Equity Data Disaggregation:** Neighborhood

**Targets (#, %):** Enroll at least X number of people from X neighborhoods

**GOAL:**

How to Measure/Define?

Equity Data Disaggregation:

Targets (#, %):

**GOAL:**

How to Measure/Define?

Equity Data Disaggregation:

Targets (#, %):

**GOAL:**

How to Measure/Define?

Equity Data Disaggregation:

Targets (#, %):

**GOAL:**

How to Measure/Define?

Equity Data Disaggregation:

Targets (#, %):

**GOAL:**

How to Measure/Define?

Equity Data Disaggregation:

Targets (#, %):

**GOAL:**

How to Measure/Define?

Equity Data Disaggregation:

Targets (#, %):

# Procedures: Identifying Interim Milestones

Definitions: Try not to get too bogged down in what's an "indicator" and what's a "milestone". They are both goals, expressed in terms of results or accomplishments you want to achieve.

**Dashboard Indicator:** The "big goal" – The long-term outcomes or results for a program or functional area that indicate you're accomplishing your "mission" and operating effectively.

**Interim Milestones:** The "smaller goals" or "stepping stone goals": The short-term results that a team or individual needs to produce to keep you "on track" to accomplish the bigger goal - or to address key factors influencing performance on that indicator.

**There are different kinds of milestones:**

**1** **Based on time:** Accomplishing 30-day job retention could be a milestone toward 6-month retention

**2** **Based on steps in a process:** Getting 200 appropriate applications could be a milestone toward enrolling 100 persons

**3** **Based on an "influencing factor" that you have identified:** Improving program attendance rates from 75% to 90% could be a milestone that helps you accomplish placement or job retention indicators. Or increasing the number of employers that have multiple hires could be a milestone for placement.

As a team, make sure you understand the Indicator (the big goal) you are focused on. Does everyone share the same definition of what that indicator means, e.g., program completion, job retention, job placement, skill attainment, enrollments? Does everyone understand and agree to the goal for that indicator, e.g., placement of 70% of program enrollees?

Brainstorm the key steps or activities that need to be successfully accomplished to reach the Indicator goal. What does successful accomplishment of that step look like? What is a tangible result? What would be different or better? How could that be measured? What are some of the other "influencing factors" that we have seen make a big difference in accomplishing this Indicator? Focus on those you have some control over. What would success or progress with that influencing factor look like?

Decide Interim Milestones: What tangible results do we want to focus on to help us stay "on track", doing the most effective things to accomplish our long-term indicator? Prioritize, and prioritize again in terms of what seems most important but is also feasible to measure.

# Short-Term Outcomes, Interim Milestones, & Activities

**Outcome**: A long-term goal or result that indicates we're achieving the changes needed to accomplish our mission. These can be changes in knowledge, attitude, behavior, status or condition and should include disaggregation by race, gender, or other equity-related groups.

**Milestones**: The important short-term progress results that are needed along the way to reach the big goal or outcome. Milestones can also be improved results for specific equity-related groups or populations. Milestone measures should be informed by data, staff observation, and participant/community input.

**Activity**: A specific action that would most likely lead to improvement in a milestone result.

| Outcome Measure & Targets | | |
|---|---|---|
| Interim Milestone Measure | Interim Milestone Measure | Interim Milestone Measure |
| Activity  Activity  Activity | Activity  Activity  Activity | Activity  Activity  Activity |

## EXAMPLES:

| Outcome: |
|---|
| 75% of unemployed uptown participants placed in positions during the current FY |

| Milestone Measure |
|---|
| # of employers who are involved in program orientation and job prep activities |

| Activity | Activity | Activity |
|---|---|---|
| Host a "Volunteer Opportunities" Employer Breakfast | Coordinate employer site visits | Have employer champions make your ask |
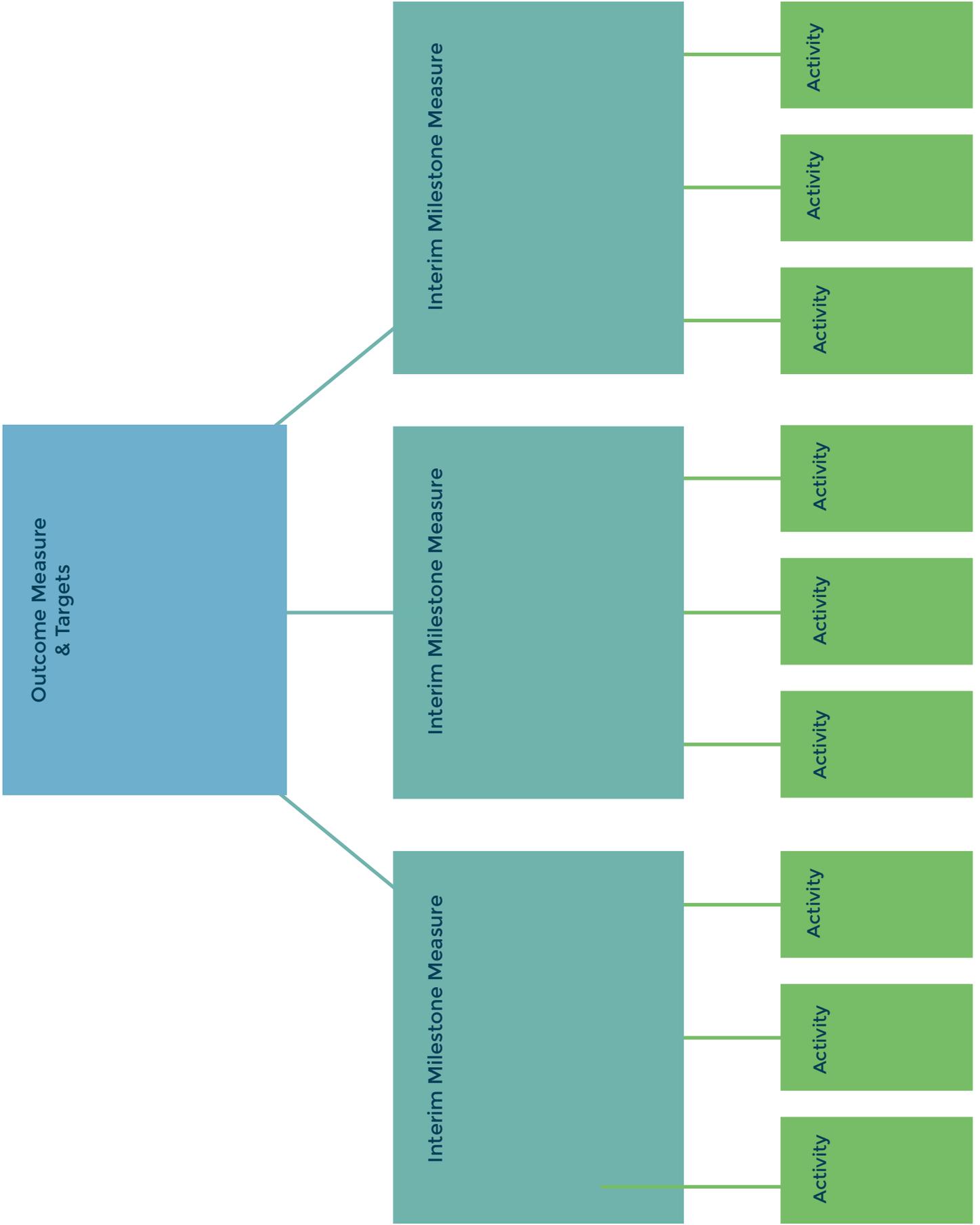
Outcome Measure & Targets

Interim Milestone Measure

Activity

Activity

Activity

Interim Milestone Measure

Activity

Activity

Activity

Interim Milestone Measure

Activity

Activity

Activity

| Outcome: |
| --- |
|  |

| Milestone Measure |
| --- |
|  |

| Activity | Activity | Activity |
| --- | --- | --- |
|  |  |  |

| Milestone Measure |
| --- |
|  |

| Activity | Activity | Activity |
| --- | --- | --- |
|  |  |  |

| Milestone Measure |
| --- |
|  |

| Activity | Activity | Activity |
| --- | --- | --- |
|  |  |  |

# Sample Interim Milestone "Metrics"

These are important short-term "progress results" that are needed along the way to reach the Big Goal or Outcome. Milestone measures should be disaggregated by race, gender, or other equity factors and be informed by data, staff observation, and participant/community input.

**Recruitment**
1. % of persons making inquiries that show up for (orientation, testing, interviews, etc.)
2. % of "accepts" that show on Day One
3. % of "accepts" that are still coming Week Two
4. Number of "Primary" referral partners (those that provide appropriate referrals)

**Work Readiness**
1. Weekly attendance rate / % of participants still there after "x" weeks
2. % of participants demonstrating "x" weeks of perfect attendance/punctuality
3. % of no call / no shows
4. % of participants rating a score of "x" or higher from internship or work experience

**Case Management / Support Services**
1. % of participants contacted on same day as absence (contact actually made)
2. % of participants getting "x" needed service
3. % of case notes that are up to date and complete
4. Number of community partners that have provided other useful services this year

**Academic or Technical Skills Training**
1. % of participants showing an improvement of "x" levels or points
2. % passing "x" quiz or completing "x" module successfully
3. % scheduling GED or certification test / % passing GED or certification test

**Job Search Skills**
1. % completing approved resume and application forms
2. % getting a rating of at least "x" from external mock interviewer
3. % of job seekers with at least "x" interviews a week

**Job Quality / Job Match**
1. % of jobs that are full-time / with benefits / with salary of at least "x"
2. % of jobs that are related to training received / match participant career interest
3. Ratio of job referrals to actual interviews / ratio of interviews to actual hires

**Employer Engagement and Feedback**
1. % of employers that have hired more than "x" participants/across more than one year
2. % of employers with multiple types of engagement (hire, volunteer, advise, donate)
3. % of employers that have had face to face contact in the past year / quarter
4. % of employers saying that they are highly satisfied with your services / would refer your program to a peer business

**Job Retention**
1. % of hires working at 30 days
2. % of graduates with follow-up conversation at least once per month / qtr

# Jumping to Questions, Not Conclusions

## Specificity - Who, When, Where?

- What do you notice? What stands out?
- What's not clear?  What's confusing?
- What is this number disaggregated (by race, gender, site, time period, other demographic, etc.)?
- What does this tell us about who is succeeding/progressing? Who isn't?
- At what point do results start to decline?
- How often does this happen?
- Does it happen in every location?
- Give me some examples of the types of (services, jobs, employers....) behind these numbers

## Context - compared to what?

- How is this compared to the "big" goal? Compared to the goal to date?
- What percent is that?
- Over what time period?
- Is this a change from the past?
- Is this unusual?
- Is this something to be concerned about? Why?
- Is this progress or good news?  Why?

## Connection - why might that be?

- Why might this be?  And why is that? And why does that happen? (5 Why's)
- Is there any connection between X and Y?
- Is there a pattern or trend emerging here?
- What do you think were some of the keys to accomplishing this progress?
- What's your hunch about factors possibly influencing this result?
- Tell us a story about this (participant / employer)...what happened?
- What could we learn from that?
- What more do we want to learn? How?

## Validity - are we sure?

- How do we know this? How was it verified?
- Does this "look" right? What's your gut feel about this?
- How sure are you?
- How could we get a better feel for that?
- How could we test this hunch?
- What else do we need to know?
- What other data or qualitative feedback could confirm this?

# Potential Influencing Factors: What's Our Hunch?

What's a goal or milestone that you're not achieving? Based on your experience, what are your initial hunches about factors getting in the way of achieving success?

## EXAMPLES:

### Potential Participant Factors

What characteristics, needs or qualities do they "bring in the door / bring to the table" that could be a factor? Demographics, skill levels, work or education history, interests and motivators, health or family issues, specific needs, etc.

- Poor interview skills
- Language barriers
- Daycare issues
- Felony background
- Lack of transportation
- Strong problem-solving skills

### Potential Service/Strategy Factors

What is it about what we do (or don't do), how often we do it or how well we do it that could be a factor? Types or length of activities, content or quality of services, effectiveness of our processes (or partner processes). Consider where services are not being provided equitably.

- Job prep- interview, resume, search training outside of the program and not mandatory
- Sporadic transportation assistance
- No attendance tracking or missed session follow up which affect program retention
- Transactional and inconsistent relationships with uptown employers
- Outdated list of employers and contacts

### Staff Item Factors

Staff allocation, staff knowledge and skills, staff communication. This could also include biases (conscious or unconscious).Could adapt for Applicant, Employer, Partner, etc.

- Fewer staff allocated to uptown site
- Staff do not reflect the racial/ethnic representation of participants
- Key staff person with good connections to employers retired
- Staff not adequately training in racial competency and inclusion

### Information Factors

What do we not know? What info is missing? Unknown or underutilized information: Assessment data, disaggregated data on results, reasons for leaving, etc.

- No program dropout/exit interviews or surveys
- Low response rate from program completers about experience or if they are actually placed

### Institutional or System Factors

Institutional, funder, or partner policies, economic or seasonal issues, resource limitations. Where might institutional racism contribute to how and why we work in a certain way?

- Transportation/ bus line does not run for 3rd shifters
- Some employers with entrance exams are testing for skills not related to the job
- Cliff Effect- where public assistance benefits may decrease or go away once employed
- Inequitable program funding allocated to uptown site

**Challenge we are trying to resolve (short- or long-term):**

Identify a result challenge you're focused on (long or short term). Based on your experience, What are our hunches about the factors related to success with this result? Which factors do we have more control over? Which might be most important to focus on?

## Potential Participant Factors

## Potential Service/Strategy Factors

## Staff Item Factors

## Information Factors

## Institutional or System Factors

# Fishbone Diagram

Use your hunches, data, and community/stakeholder feedback, to explore influencing factors and their root causes. Push your thinking: Why do those factors exist? What do you perceive are their root causes?
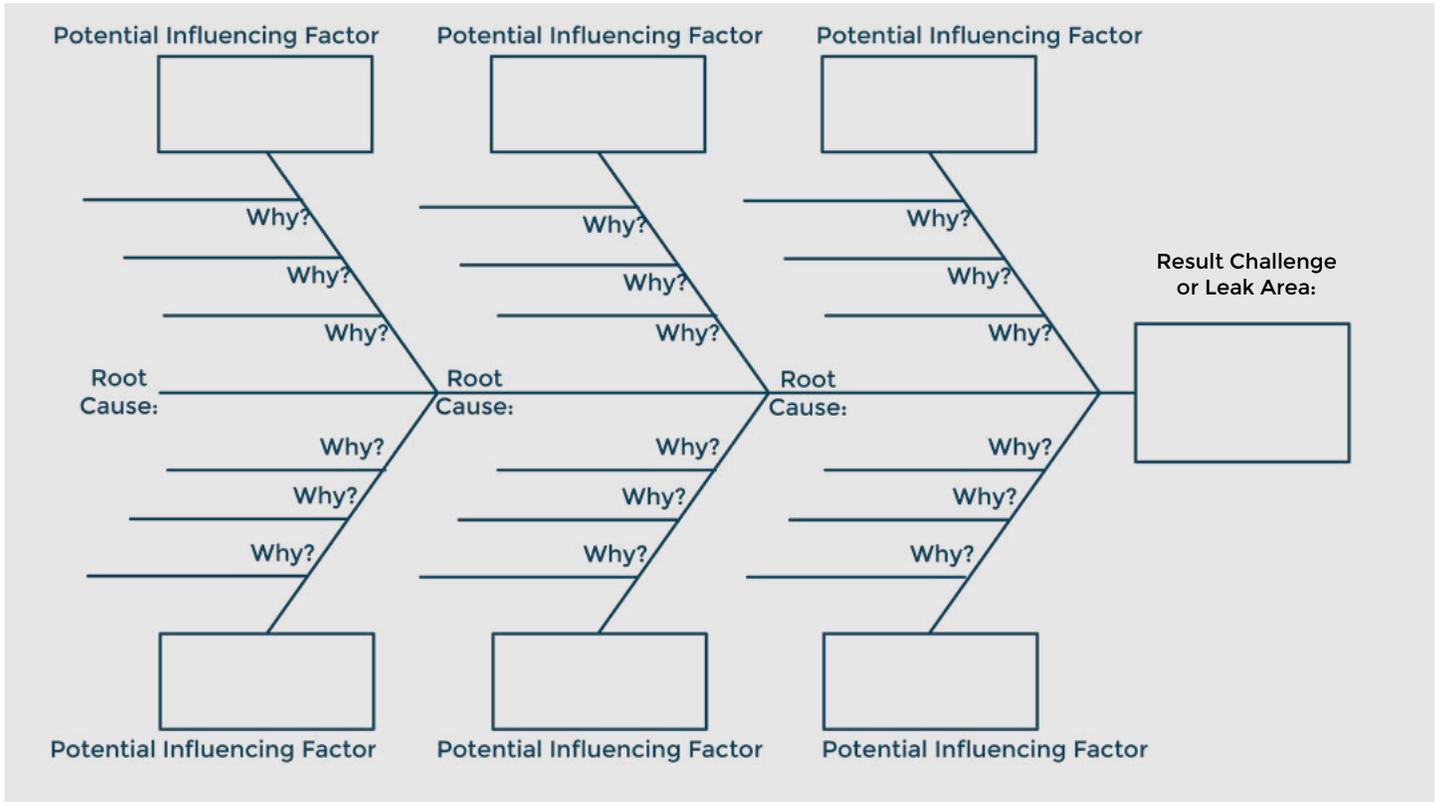


## EXAMPLES:

| Potential Influencing Factor | | |
| --- | --- | --- |
| Poor interview skills | | |
| **Why?** Low attendance at interview prep trainings | **Why?** Interviewing skills training not mandatory | **Why?** Low staff capacity & knowledge |
| Root Cause: Low funding allocation to uptown site for job prep training | | |
| Data Sources: Ratings from mock interviewers, attendance data from training | | |
| Stakeholders to Engage: Participants, Employers, Temp Agencies | | |

Result Challenge
or Leak Area

Potential Influencing Factor

Why?
Why?
Why?

Root
Cause:

Why?
Why?
Why?

Potential Influencing Factor

Potential Influencing Factor

Why?
Why?
Why?

Root
Cause:

Why?
Why?
Why?

Potential Influencing Factor

Potential Influencing Factor

Why?
Why?
Why?

Root
Cause:

Why?
Why?
Why?

Potential Influencing Factor

## Potential Influencing Factor

| Why? | Why? | Why? |
|------|------|------|

Root Cause:

Data Sources:

Stakeholders to Engage:

## Potential Influencing Factor

| Why? | Why? | Why? |
|------|------|------|

Root Cause:

Data Sources:

Stakeholders to Engage:

## Potential Influencing Factor

| Why? | Why? | Why? |
|------|------|------|

**Root Cause:**

**Data Sources:**

**Stakeholders to Engage:**

## Potential Influencing Factor

| Why? | Why? | Why? |
|------|------|------|

**Root Cause:**

**Data Sources:**

**Stakeholders to Engage:**

# Action Planning

## Further Data Analysis or "Deeper Dives"
What other data-related action steps are needed to better understand our challenge?

| Action Step | Due Date | Who is responsible? |
|---|---|---|
|  |  |  |

## Additional Participant, Applicant or other Community Engagement
What other engagement-related action steps are needed to better understand our challenge?

| Action Step | Due Date | Who is responsible? |
|---|---|---|
|  |  |  |

## Change Ideas
Think about what we heard or discussed today that might help us address some of the root causes or drivers behind our challenge.

| Action Step | Due Date | Who is responsible? |
|---|---|---|
|  |  |  |

## Next Steps to Explore These Ideas or Strategies
What would be the next steps to explore these ideas with staff, participants, or partners to better understand any unintended consequences or challenges related to these ideas?

| Action Step | Due Date | Who is responsible? |
|---|---|---|
|  |  |  |

# Recruitment Milestone Funnel

**Calculating outreach, recruitment, and intake goals**
as developed by STRIVE National

| Program Stages | Milestones Per Cycle |
|---|---|
| **Contact** _____ **per cycle** | _____ # of contacts |
| Have _____% express interest | _____ # of interested individuals |
| Have _____% of interested individuals complete applicaiton | _____ # of applicants |
| Have _____% accepted for group interaction | _____ # accepted for group interaction |
| Have _____% accepted for group interaction attend | _____ # group interaction attendees |
| Have _____% accepted for group interaction attend day 1 | _____ # day 1 attendees |
| Graduate _____% of day 1 attendees | _____ # graduates |
| Place _____% of graduates | _____ # first placements needed per cycle |

**TO GET HERE**
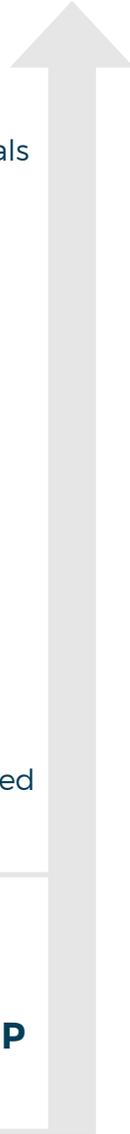
# of cycles per year: _____

**START HERE**     **Annual goal for # of first placements:** _____     **AND WORK UP**

# Zip Code Report

**Zip Codes of Enrollees during most recent Program Year**

| Zip Code | # of Trainees Living in Zip Code (at enrollment) |
|---|---|
| 46201 | 40 |
| 46202 | 17 |
| 46203 | 27 |
| 46204 | 8 |
| 46205 | 65 |
| 46208 | 40 |
| 46214 | 2 |
| 46218 | 71 |
| 46219 | 19 |
| 46221 | 4 |
| 46222 | 22 |
| 46224 | 61 |
| 46225 | 6 |
| 46226 | 28 |
| 46227 | 15 |
| 46228 | 6 |
| 46229 | 10 |
| 46234 | 2 |
| 46235 | 24 |
| 46237 | 2 |
| 46239 | 3 |
| 46241 | 5 |
| 46250 | 2 |
| 46254 | 22 |
| 46260 | 11 |
| 46268 | 7 |
| 46032 | 1 |
| 46033 | 1 |

# JVS-SF Employer Engagement Milestones

Objective: To Improve the Caliber of Job Applicants, Increase Employee Skills and Raise Retention through Partnerships with JVS – Resulting in Increased Financial Self-Sufficiency for JVS clients

| | Level I | Level II | Level III | Level IV | Level V |
|---|---|---|---|---|---|
| **Employer Examples** | Hyatt Regency<br><br>Mills Peninsula | Borders<br><br>Chinese Hospital | Microsoft<br><br>On Lok Senior Svcs | Safeway<br><br>Laguna Honda | Wells Fargo<br><br>UCSF |
| **Description of Program Engagement** | Early stage of relationship. Just establishing a knowledge of JVS programs and services and defining relevance to employer needs. | Some relationship is established. Employer may have participated in one or two events, come for a tour, hired once, etc. | Greater and more regular involvement in JVS programs, collaboration in new program development; JVS is becoming a resource in hiring and training | Strong relationship with JVS; reliance on JVS for training and recruitment; collab-oration in program develop-ment; JVS incorporates employer feedback re: re-cruit-ment practic-es, etc. | Long-standing re-lationship with JVS, supporter of JVS clients and pro-grams. Established hiring relationship, consistent input in program design, some financial support. |
| **Examples of Activities** | - Jobs online<br>- Hiring JVS candidates | - Preceding activities, &<br>- Refer employees/job seekers to JVS services<br>- Participate in JVS job fairs<br>- Nominate JVS hires for Strictly Business Employee of the Year Award | - Preceding activities, &<br>- Speakers/presenta-tions at JVS events<br>- Internships or job shadowing<br>- Informational & mock Interviews<br>- Focus groups<br>- Advisory Board | - Preceding activities, &<br>- Refer instructors to JVS programs<br>- Recruiter presenta-tions to JVS staff<br>- Letters of support for grant proposals<br>- Clinical rotations | - Preceding activities, &<br>- Customized training for specific hard-to-fill positions<br>- Retention services and career coaching for new hires and your employees<br>- Onsite training for your employees |
| **Benefit to Employer** | Increase quality and pipeline of job candidates | - Increase community visibility of your organization<br>- Refer employees to JVS training programs<br>- Strengthen career advancement op-portunities | - Opportunity to pre-screen job candidates<br>- Input into new training programs<br>- Increased aware-ness of successful workforce models through Adv. Bd and focus groups | - Candidates trained to your specifications<br>- Increased JVS responsiveness to recruiter needs<br>- More opportuni-ties to observe potential candidates<br>- Access to lever-aged funding for training | - Reduced in-house training cost<br>- Improved reten-tion in your facility<br>- Ability to provide staff onsite training in needed skills |

**Common benefits: Increase quality and pipeline of job candidates**
**Increase visibility of your organization in the community**

# Dashboard Indicators Pathway to Success Program

|  |  | Quarter 1 | Quarter 2 | Quarter 3 (to date) | Quarter 3 Target |
|---|---|---|---|---|---|
| Referrals | # referrals | 702 | 573 | 641 | 600 |
| Starting Workshop | # starting | 346 | 340 | 350 | 360 |
| | % of referrals | 49% | 59% | 50% | 60% |
| Completing Workshop | # completing | 265 | 253 | 256 | 270 |
| | % starting | 77% | 74% | 70% | 75% |
| Placements | # placements | 208 | 165 | 180 | 225 |
| | % completed | 79% | 65% | 70% | 82% |

## Retention Rates/Average Wage

|  |  | Quarter 1 | Quarter 2 | Quarter 3 (to date) | Quarter 3 Target |
|---|---|---|---|---|---|
| Placed | | 208 | 165 | 180 | 225 |
| 30-Days* | # at 30 days | 180 | 151 | 160 | 191 |
| | % at 30 days | 87% | 92% | 89% | 85% |
| 90-Days* | # at 90 days | 146 | 131 | 130 | 169 |
| | % at 90 days | 71% | 79% | 72% | 75% |
| 180-Days* | # at 180 days | 127 | 115 | 97 | 146 |
| | % at 180 days | 61% | 70% | 54% | 65% |
| Average Wage | | $16.57 | $16.07 | $17.10 | $19.00 |

*Retention rates included those clients who have attained that retention point and those who are still eligible for that retention point, but have not yet attained it.

| | |
|---|---|
| 🟩 | On target |
| 🟨 | Marginal/watch closely |
| 🟥 | Out of range; immediate action required |

|  |  | Quarter 1 | Quarter 2 | Quarter 3 (to date) | Quarter 3 Target |
|---|---|---|---|---|---|
| **Referrals** | # referrals | | | | |
| **Starting Workshop** | # starting | | | | |
| | % of referrals | | | | |
| **Completing Workshop** | # completing | | | | |
| | % starting | | | | |
| **Placements** | # placements | | | | |
| | % completed | | | | |

## Retention Rates/Average Wage

|  |  | Quarter 1 | Quarter 2 | Quarter 3 (to date) | Quarter 3 Target |
|---|---|---|---|---|---|
| **Placed** | | | | | |
| **30-Days*** | # at 30 days | | | | |
| | % at 30 days | | | | |
| **90-Days*** | # at 90 days | | | | |
| | % at 90 days | | | | |
| **180-Days*** | # at 180 days | | | | |
| | % at 180 days | | | | |
| **Average Wage** | | | | | |

*Retention rates included those clients who have attained that retention point and those who are still eligible for that retention point, but have not yet attained it.

**On target**

**Marginal/watch closely**

**Out of range; immediate action required**

# Organization or Program Self-Assessment

## Strengthening Our Culture of Using Data for Learning and Improvement

- Relevant staff of an organization, team or program should complete the self-assessment
- Gather as a team to look at compiled results, reflect on what stands out & share more about the ratings
- Based on that discussion, identify 2-3 strengths to celebrate and build on
- Identify 2-3 areas to focus on to make your data culture stronger

**Organization or Program Self-Assessment:**
(indicate if for a particular department or program)

| Strategies | Rate org. or program 1-5 (5 = strong) | Comments, clarifications or examples |
|---|---|---|
| **FOCUS ON THE DATA THAT MATTERS TO YOU (not just the funders)** | | |
| **1.** Strong Senior Leadership Around Data for Learning: Senior leaders convey the expectation of continuously improving performance and using data to spark learning and innovation. Data is not solely for accountability or compliance. | | |
| **2.** Clear Vision and Visible Success Measures: Leadership works with managers and staff to create core "dashboard indicators" that measure mission success (how much, by when). These measures are visible and understandable, and there is transparency about success (or lack of). | | |
| **3.** Aligned Progress Milestones: Managers work with individuals and functional teams to identify important milestone results that contribute to success measures and can drive real-time improvement, e.g., recruitment, skill gain, client engagement, job readiness, and employer-related measures. | | |
| **4.** Meaningful Data Comparisons and Disaggregation: Reports on outcome measures compare results to target goals, past results and peer organizations (where possible). | | |
| **5.** Disaggregated Reports: Reports are disaggregated by race, gender and other relevant sub-groups to monitor whether results are accomplished equitably across populations. | | |

| SUPPORT AN "INQUISITIVE MIND" ENVIRONMENT | | |
|---|---|---|
| **6. Frequent, Regular Dialogue on Data at All Levels:** Staff review and discuss quantitative data and qualitative feedback as an ongoing part of organization, team and supervisory meetings. | | |
| **7. Struggle and Failure Seen as Opportunity:** Program or staff struggles with producing needed results are responded to as opportunities for team learning and innovation (vs. blaming others or avoiding the situation). | | |
| **8. Regular Constituent / Customer Feedback Process**: Participants, referral sources, employers and other partners are engaged in ongoing feedback on their experience: discussing factors behind low results, suggesting ideas for improvement, and giving feedback to new models. | | |
| **9. Engagement in Testing Hunches**: Leadership and managers engage staff in identifying and exploring hunches about potential factors influencing performance and support their use of lessons learned to generate ideas for change. | | |
| **10. Improvement Celebrated**: Senior leaders and managers regularly recognize individuals or teams for their improvement efforts and their progress in using data – through emails, newsletters, and storytelling in meetings. | | |
| HELP STAFF EXPERIENCE DATA'S BENEFITS | | |
| **11. Broad Access to Data**: As appropriate, staff have broad access to the real-time data that they need to do their work. | | |
| **12. Reports Useful for the Job**: Organization uses line staff and manager input to create data reports and tools that are easy to understand, help staff work more productively, and allow them to see their progress toward result goals. | | |

| | | |
|---|---|---|
| **13. Training, Training, and more Training:** Organization provides ongoing training--both formal and informal—so that staff feel confident with existing data systems and can demonstrate competency in their use. Managers receive the training they need to use data as part of their staff coaching | | |
| **BUILD SYSTEMS TO ENHANCE DATA QUALITY** | | |
| **14. Data Quality & Timeliness Tied to Job Performance Ratings:** There are clear expectations for data and documentation: "If it's not there, it didn't happen." These expectations are reinforced in job descriptions, meetings and performance evaluations. | | |
| **15. Clear Data Quality Control Processes:** A clear process is in place to ensure data completeness and accuracy, including staff data review strategies, integrated software features to support data quality, and designated staff times for data entry or clean-up. | | |
| **INVEST ORGANIZATIONAL RESOURCES CONTINUOUSLY** | | |
| **16. Responsive, User-Friendly Software:** The organization provides staff with software that meets varied data needs and is configured and customized to be easy to use. Budgets include resources for upgrades of hardware and software. | | |
| **17. Continuous Improvement Resources (staff time, staff allocation, and community networking):** Leadership and managers allocate the time and resources needed to support staff in ongoing reflection, evaluation and continuous improvement work. Where possible, staff are designated to help drive this process in the organization or department. | | |

# Notes

# Notes

Workforce
Benchmarking
Network

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