

America's Promise Jobs-Driven Grants Evaluation: Site Visit Master Protocol

PRIVACY AND TAPING

Good afternoon. My name is _____, and this is my colleague _____ and we are from Mathematica Policy Research/Social Policy Research Associates. We are part of an independent research team that is studying the services being provided through [Program Name] as part of the America's Promise Job Driven Grants. The study is on behalf of the U.S. Department of Labor. The department wants to learn about the efforts of regional partnerships to support job training in high-growth industries and whether such efforts help participants learn skills in careers that offer career growth and advancement. Thank you very much for agreeing to participate in this conversation. Your participation is very important to the study.

We value the information you will share with us and want to make sure we capture it all. We are recording our discussion today to help us remember what everyone said when we go back to write our report. Although we will be taping the session and taking notes, we will not use names or attribute information to any particular individual, and we will report our findings at an aggregate level. This recording is only listened to by our study team and will be erased at the conclusion of our study.

Before we begin, I just want to clarify that the America's Promise program at this site is called [PROGRAM NAME]. If I reference "America's Promise" at any point in the interview, I am referring to [PROGRAM NAME].

Are you okay with our recording the conversation? [If yes, start recorder. If no, take hand written notes.]

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I. COMMUNITY CONTEXT, ORGANIZATION, AND ADMINISTRATIVE STRUCTURE

A. Respondent

- Name and title:
- Name and type of company/organization:
- How long have you been employed at the company/organization?
- Briefly, can you describe your prior work experience?
- Broadly speaking, what is your role in the [PROGRAM NAME]?
- Can you describe in your own words the goal of [PROGRAM NAME]?

B. America's Promise economic context

1. Tell me about the regional and local economic context that may have affected the [PROGRAM NAME] design and implementation.

- a. Briefly describe the major industry sectors in the local economy where [PROGRAM NAME] services are being implemented. **(RQ4)**
- b. Is the economy in transition from one type of industry to another (for example, manufacturing to energy, or service)? **(RQ5)**
- c. How much variation is there in local economic conditions, relevant industries and occupations, and geography (urban/rural) across the region? How did this context affect grant planning and implementation? **(RQ3, RQ5)**
- d. Are there new or emerging industries in the region? If so, what industries? **(RQ5)**

2. What changes, if any, did your program make as a result of COVID-19? How were the local industries and occupations targeted by the grants affected?

3. We know from our discussion prior to the [VISIT/CALL] that your target industries and occupations include [ADD DETAIL]. How and why were these industries and occupations selected? **(RQ4)**

- a. Were others considered but not included? Why? **(RQ4)**
- b. Have they changed over time? If so, why and how? **(RQ4)**

4. Describe the demand for careers in selected industries and the types of employers in the local area. What occupations are in high demand? Why? **(RQ4, RQ5)**

5. How did you incorporate labor market information or analysis to identify which fields have the most significant needs for middle- and high-skill workers? Did you assess what those skill needs were and to what extent the education and training system was preparing local workers to have those skills? **(RQ3, RQ4, RQ5)**

6. What local economic development efforts align to industries targeted by the program? **(RQ2)**

7. How does the local economy affect the work you do or who you serve? **(RQ3)**

8. How do state or local policies affect the work you do or who you serve? **(RQ3)**
 9. To what extent has the local economic context helped the [PROGRAM NAME] planning and implementation efforts? **(RQ3, RQ5)**
 10. To what extent has the local economic context hindered the planning and implementation efforts? **(RQ3, RQ5)**
 11. What do you feel are the biggest barriers for individuals in your community in finding employment and/or training? Does this program address those? **(RQ5)**
- C. Regional context and target sectors
12. How is the region defined for the America's Promise grant? **(RQ1)**
 - a. Was the region defined before the grant? If so, did you expand or reduce the size or definition of the existing region for the purposes of this grant? **(RQ1)**
 - b. Does it cross state lines? If so, how did you coordinate across states to define the service region? Did any challenges emerge in working across states? **(RQ3)**
 - c. Why was that region selected for the grant? **(RQ1, RQ2)**
 - d. What factors determined how the region was defined and operationalized? Was it based on prior regional and economic development efforts? **(RQ1)**
 - e. Is the region aligned with the WIOA regions? If not, did you consider aligning them in the same fashion? How does it differ? **(RQ1)**
 13. How does [PROGRAM NAME] fit in with other regional workforce development initiatives and priorities? Does it build off of any previous grants? **(RQ2)**
- D. Regional partnerships and communication
14. Based on our discussions before the [VISIT/CALL], our understanding is that the [PROGRAM NAME] partnership includes [LIST organizations]. Were any of these partners added since your grant application? If so, which ones and why? **(RQ7, RQ11)**
 - a. Are any partners that were included in the grant application no longer involved? If so, which ones and why? **(RQ11, RQ12)**
 - b. Broadly speaking, what role does each partner play in the America's Promise grant? Probe: planning or oversight of grant activities? Service delivery? Job development? **(RQ6)**
 15. How did the partnership for this grant form? **(RQ7)**
 - a. Was there a champion for the grant application? **(RQ6, RQ10)**
 - b. Who determined which specific organizations to include? Was the decision driven by grant requirements? What other factors were involved in the decision? **(RQ7)**
 - c. Were organizations approached that chose not to participate? Which ones and why? **(RQ7)**
 - d. Which grant partners have you partnered with in the past? Please briefly describe your past experience. In what capacity have you worked together? **(RQ7)**

- e. Did the pre-existing partnership(s) involve activities similar to those being implemented through this grant? **(RQ2)**
 - f. Are any of the partnerships new? If so, which and how did you identify this partner and develop this partnership? **(RQ7)**
16. How many employers are engaged? How many did you approach to engage the ultimate group of employer partners? If any chose not to participate, what were the reasons? **(RQ7)**
- a. How did you decide which employers to engage? And how were they identified? **(RQ7)**
 - b. What makes an employer a good candidate to partner with [PROGRAM NAME]? What qualities do you look for to determine which employers to partner with more? **(RQ13, RQ14)**
 - c. How did you approach the employers? Who was responsible? What was the messaging? **(RQ7)**
 - d. How have you worked with employer associations or a chamber of commerce to reach employers? **(RQ7)**
17. How were employer partnerships influenced by COVID-19? How did employers' needs change and how did grantees work to address those changing needs?
18. Thinking about your own organization, why did you get involved in the program?
- a. How did you hear about the program? **(RQ1, RQ6)**
 - b. How did you get involved? To what extent were you involved in the grant application process, beyond providing a letter of support? To what extent were you involved in designing services? Why did you choose to get involved with [PROGRAM NAME]? **(RQ1, RQ16)**
19. Which partners were involved in planning for the program? In what capacity? If some partners were not involved, why? Probe on each partner, including workforce development, higher education, economic development and employer partners. **(RQ9, RQ16)**
20. Thinking about all of your partners on this grant, which partners are the most involved so far? **(RQ9, RQ10)**
21. How does the grantee organization facilitate communication among partner organizations? **(RQ8)**
- a. Does your organization participate in regular partner meetings? How frequently do they occur? What form do they take (in-person, conference call, etc)? **(RQ8, RQ9)**
 - b. Which partners participate in regular meetings? **(RQ8, RQ9)**
 - c. What are common topics for these meetings? **(RQ16)**
 - d. What other forms of communication does your organization use as part of the [PROGRAM NAME]? **(RQ8)**
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- e. How has this changed over time? **(RQ11)**
 - 22. Do other partners communicate about [PROGRAM NAME] without the lead organization involved? **(RQ9)**
 - a. How frequently? In what form (in-person, conference call, etc.)? **(RQ9)**
 - b. What are common topics for these meetings? **(RQ9)**
 - c. How do the partners keep the grantee updated on their interactions and decisions? **(RQ8, RQ9)**
 - 23. Is the amount of communication appropriate? Too much? Too little? **(RQ12, RQ13)**
 - 24. Which partners do you view as most critical for this effort? **(RQ10)**
 - a. What systems (workforce development system, higher education system, and economic development systems) do you perceive as critical to support and implement regional workforce and economic development efforts like [PROGRAM NAME]? **(RQ6)**
 - b. From your perspective, are the partners involved in [PROGRAM NAME] perceived as the right mix of partners? If not, what types of partners are missing? **(RQ10)**
 - 25. How did the partnership change or evolve over time? For example, the mix of partners, their roles, their level of involvement? Why? **(RQ11)**
 - 26. Thinking specifically about employer and industry partners, how do you solicit their feedback? How do you use that feedback for continuous improvement in partnering with them and serving their needs? **(RQ8)**
 - 27. Did your organization experience any challenges in relation to partnerships? For example, did you experience challenges recruiting, retaining, or engaging partners? With communication with or between partners? If so, describe. **(RQ12)**
 - a. How did the grantee and/or your organization address these challenges? **(RQ12)**
 - 28. How does your organization define successful partner involvement as it relates to [PROGRAM NAME]? What do you perceive as the most successful aspects of your partnerships? **(RQ13)**

E. Grant administration/leadership

- 29. Describe the management structure of the [PROGRAM NAME].
 - a. Is there a steering committee/advisory board that oversees the program? Who serves on this committee/board? Are employers included? Are other partners included; which ones? How often do they meet? **(RQ8, RQ9)**
 - b. Describe how the leadership team (for example, advisory team/steering committee) monitors and supports all [PROGRAM NAME] grant activities. **(RQ8, RQ9)**
- 30. Who on the [PROGRAM NAME] leadership team has responsibility for the following:
 - a. Creating shared understanding and buy-in from staff about the effort? **(RQ16)**

- b. Working individually with staff members regarding grant implementation? **(RQ16)**
- c. Promoting communication among staff about the grant's goals and shifts in practices? How is this done? (For example, daily bulletins, staff meetings, web pages, joint planning time). **(RQ16)**
- d. Working with partners? Coordinating partner meetings? Conducting activities with partners? **(RQ9, RQ16)**
- e. Data systems and reporting. **(RQ16)**

F. Grantee finances and matching resources

31. Which organization/division/department has fiscal responsibility for the grant? What are the responsibilities of this fiscal agent with regard to services? **(RQ15)**

32. Does your organization contribute financial or in-kind/leveraged resources to [PROGRAM NAME]? If so, how much and in what way? How were these contributions determined? **(RQ15)**

33. Based on the information from your grant application, we collected the following information about how your program meets DOL's formal matching/leveraging requirement: [ADD DETAIL]. *Identify how the lead organization meets the formal matching/leveraging requirement from the grantee proposal and quarterly narrative reports prior to the visit.* **(RQ15)**

- a. Who provided matching funds? **(RQ15)**
- b. Are these matching funds in-kind or cash contributions? **(RQ15)**
- c. Are these matching funds at your disposal, or are they earmarked for particular services? If they are earmarked, which services are they designated for? **(RQ15)**
- d. What other conditions apply to these matching funds? **(RQ15)**
- e. How have these funds changed over time? **(RQ15)**
- f. What were the biggest successes and challenges you had in meeting the leveraging requirement? **(RQ15)**

34. Considering all the funding sources available for [PROGRAM NAME], are the funds sufficient to support participants? Why or why not? **(RQ15)**

G. Grant design and planning process

35. Please describe the grant planning and service design process. **(RQ16)**

36. [For grants operating in multiple states] What steps were taken to facilitate service design and planning across states? Did cross-state partnerships require special planning and coordination? **(RQ3, RQ8)**

37. How long did the planning and design process take? Was it shorter, longer or about the time that you expected? **(RQ16)**

38. What were the key challenges of the planning and design process? (For example, different visions/philosophies of partners, working with employers/industry

groups, deciding on specific project activities, relative focus on specific populations, identifying reasonable time line, outcomes) **(RQ16)**

H. Staffing

39. Who are the staff working on [PROGRAM NAME]? **(RQ16)**
- What are their titles, roles, organization, tenure, and time spent (in FTE) on the grant? (Include administrators, grant manager, supervisors, case managers, job developers, trainers, and other frontline and support staff) **(RQ16)**
 - Do you have an organizational chart that you would be willing to share? **(RQ16)**
 - Are these staff funded by the grant? Fully or partially? **(RQ16)**
 - For those with responsibilities outside of the grant, how do staff balance their [PROGRAM NAME] responsibilities with other roles in the organization? **(RQ16)**
40. Did your organization hire any staff specifically for [PROGRAM NAME]? **(RQ15)**
- What qualifications were required for the positions? **(RQ16)**
 - Do they have connections to the target sector? **(RQ16)**
 - How did the recruiting process go for recruiting staff? How long did it take? Did your organization face any challenges identifying and hiring qualified applicants? **(RQ16)**
 - What kind of training do staff hired through the grant receive? **(RQ16)**
41. Do you have plans to add or delete staff positions? Has there been staff turnover since the beginning of the grant? Explain (which positions, why). What implications has turnover had for [PROGRAM NAME]? **(RQ16)**
42. Is the current level of staffing sufficient to run [PROGRAM NAME]? If not, explain. **(RQ16)**
43. Describe the extent to which [PROGRAM NAME] staff communicate/collaborate with one another. Within your organization? Across partner organizations? **(RQ9, RQ16)**
44. How often do staff (including partners) formally meet? Informally meet? **(RQ9, RQ16)**
- Provide an example of a successful collaboration among [PROGRAM NAME] staff (including training providers and workforce staff). **(RQ22)**
 - What are some of the key challenges to getting staff (including partners) to collaborate with one another? **(RQ12, RQ16)**

II. RECRUITMENT, ENROLLMENT, AND PARTICIPANT CHARACTERISTICS

A. Eligibility, recruitment, and application

45. Who is your target population for [PROGRAM NAME] services? **(RQ23)**
- Based on our understanding from your application, you were planning to serve [#] participants over the life of the grant. Is that right? **(RQ15)**

- b. What proportion of those participants do you anticipate being unemployed? Underemployed? Incumbent workers? **(RQ23)**
- c. Are there any other subpopulations that your region is targeting within those larger categories (e.g. veterans, groups underrepresented in the industry)? If so, what are they? How many individuals do you anticipate enrolling from each? **(RQ23)**
- d. How did you determine which populations to target? **(RQ23)**
 - 46. How are individuals recruited to participate in [PROGRAM NAME]? **(RQ24)**
- a. Do you conduct outreach to inform potentially eligible applicants about the services available through [PROGRAM NAME]? What approaches do you use to conduct outreach? For example, advertising on radio or television, social media, mailings, or community outreach events. **(RQ24)**
- b. What messages are you emphasizing in your recruitment efforts? For example, are you emphasizing services available or financial aid support or some other feature? **(RQ24)** [*Site visitors: Gather outreach materials.*]
- c. What strategies have been most-effective? How do you know these are working well? From your perspective, why are these strategies effective? **(RQ22)**
- d. What recruitment strategies are not working as well? How do you know these aren't working as well? From your perspective, why are these strategies less effective? **(RQ25)**
- e. Are there any challenges with recruitment? Have there been challenges garnering interest in the services or is there more interest from individuals than you can serve? If so, what do you think are the reasons? How have you overcome these challenges? **(RQ25)**
- f. From your perspective, how successful have recruitment efforts been? **(RQ22)**
 - 47. Who is involved in recruitment for [PROGRAM NAME]? **(RQ21, RQ22)**
- a. Who leads recruitment efforts? **(RQ16)**
- b. Are there any key partners involved in recruitment? What role does this organization[s] play in recruiting participants? **(RQ9, RQ16, RQ24)**
- c. Why did you decide to partner with this organization[s] to help with recruiting applicants? Do they have a history of recruiting program participants? How are they recruiting participants? **(RQ9, RQ10)**
 - 48. What are your main referral sources? To what extent does [PROGRAM NAME] receive referrals from employers? American Job Centers? Other partners? **(RQ24)**
 - 49. How do participants enroll in [PROGRAM NAME]? Is there an application process? **(RQ24)**
- a. Can you walk me through the typical application process? Is there an application packet? **(RQ24)**

- b. Do you offer any incentives to encourage application or enrollment in [PROGRAM NAME]? **(RQ24)**
 - 50. Who is involved in the application process? **(RQ16)**
 - a. Who leads efforts related to the application process? **(RQ16)**
 - b. Are there any key partners involved in the application process? **(RQ16)**
 - 51. What is the process for determining eligibility? **(RQ21, RQ22)**
 - a. What criteria do you use to determine eligibility for [PROGRAM NAME]? For example, are there specific requirements related to employment status, socioeconomic status, demographic characteristics, education or prior work experience? **(RQ23)**
 - b. How were these eligibility criteria determined? **(RQ23)**
 - c. Among individuals who apply for services, about what percentage of interested individuals are eligible for [PROGRAM NAME]? What are the main reasons that individuals are deemed ineligible? Are those determined ineligible offered services through other funding sources or providers? **(RQ24)**
 - d. Are individuals assessed? If yes, is this done as part of eligibility determination or after enrollment? Which assessments are used? **(RQ24)**
 - e. Does the eligibility criteria vary dependent on the type of services participants expect to receive? For example, does it vary for career counseling compared to employment training, internships, or apprenticeships? **(RQ18, RQ24)**
 - f. What role, if any, do employers play in determining eligibility? **(RQ24)**
 - g. What types of information do you collect and track for each prospective participant? How do you collect this information? **(RQ24)**
 - 52. Who is involved in determining participant eligibility for [PROGRAM NAME]? **(RQ8, RQ9, RQ24)**
 - a. Who leads efforts to determine applicant eligibility for services? **(RQ24)**
 - b. Are there any key partners involved in determining applicant eligibility? What role does this organization[s] play in determining applicant eligibility? **(RQ9, RQ10)**
 - c. Why did you decide to partner with this organization[s] to help determine applicant eligibility for [PROGRAM NAME]? **(RQ10)**
 - 53. How is your grant progressing toward your target number for enrollment? **(RQ25)**
 - a. To date, how many participants have enrolled in [PROGRAM NAME]? **(RQ26)**
 - b. How easy or hard has it been to recruit a sufficient number of participants? **(RQ25)**

B. Participant characteristics

- 54. Ultimately, what have been the characteristics of America's Promise participants? How do they differ from the target population for this effort? **(RQ26)**

- a. What are participants' demographic characteristics compared to your planned target population? **(RQ26)**
- b. Are they focused on particular industries or occupations? **(RQ26)**
- c. Do they require similar sets of services? **(RQ17, RQ26)**
- d. To what extent do enrolled participant align with your target population? Are you able to successfully enroll the target population? **(RQ23, RQ25, RQ26)**

III. AMERICA'S PROMISE SERVICES

A. Overview of services

55. Based on your grant application and our telephone discussions, the structure and key components of the America's Promise services include [ADD DETAIL]. *Identify key service offerings (education/training, case management, job placement, supportive services) based on grantee proposal and quarterly narrative reports prior to the visit.* **(RQ15)**

- a. Is this correct? What changes, if any, have been made to your service structure or model since the proposal? **(RQ15)**
- b. How did your program adjust its service offerings, including changes to training, case management, coaching, and or job placement services, as a result of COVID-19?

56. How have the demographics of the target population influenced which services are offered and how services are delivered? **(RQ16)**

57. Are all components of [PROGRAM NAME] services available throughout the region? Or is there variation in what is available based on a participant or partner's location? Please describe. **(RQ5, RQ16)**

58. Is there a core set of services that all participants receive (such as an employment plan or set of assessments)? Do participants typically receive multiple services? If multiple services, which services are commonly combined? If yes, why do you use specific combinations of services? **(RQ17)**

59. What is the process for determining the services and supports that each participant is offered? **(RQ17, RQ18)**

60. Do staff develop service plans with participants? If so, what do the plans entail? Are they updated and, if so, how often? **(RQ16, RQ17)**

61. To what extent are assessments used to determine service plans? If used, what assessments are used? **(RQ16, RQ17)**

62. Where is the [PROGRAM NAME] in regards to its proposed implementation schedule? Are you delivering all of the planned services? If no, what has caused the delay and what steps are still needed as you move towards full implementation? **(RQ15, RQ16)**

B. Work readiness and case management services

63. Please describe case management and/or advising services provided to [PROGRAM NAME] participants.

- a. What organization(s) provide these services? Which staff at those organizations provide those services? **(RQ16, RQ17)**
- b. Are these services unique to the grant or provided in coordination with other available services, such as the Workforce Innovation and Opportunity Act (or WIOA) or community college advising? **(RQ2, RQ15)**
- c. About how many participants does each case manager work with? Do they also have non-[PROGRAM NAME] caseloads? **(RQ2, RQ16)**
- d. How frequently do participants meet with case managers? How long do these meetings last on average? **(RQ15)**
- e. How do case managers typically provide services to participants? In-person meetings, phone calls, emails? Does this vary by organization providing case management services or by the type of services the participant is receiving? **(RQ15, RQ16)**
- f. What topics/issues are addressed through case management? What types of issues do participants frequently work with case managers to address? Are these topics sector-specific? **(RQ16)**

64. Are participants responsive to outreach from case managers? Do they attend regularly scheduled meetings? **(RQ16, RQ18)**

65. How do case managers or other staff work with participants to determine what types of education, training and supports are needed? Do they develop an individual employment plan for each participant? Is this updated over time? **(RQ17, RQ18)**

66. Is work readiness training offered to participants? **(RQ15)**

- a. Which organization provides it? **(RQ15)**
- b. How many days/weeks does it last? How many hours total? **(RQ15)**
- c. What topics are covered (such as career exploration, labor market information, resume preparation, interviewing skills, workplace behavior, etc.)? **(RQ6, RQ15)**
- d. Do all participants attend or just a subset? Why? **(RQ17, RQ18)**

C. Education and training services offered

67. Please describe the career pathways that have been developed or are being targeted for [PROGRAM NAME] participants. What specific pathways have been developed? For what occupations and sectors? **(RQ4, RQ20)**

68. What entities were involved in their development? **(RQ4, RQ8, RQ9)**

69. What type(s) of training is the grant offering for each pathway (apprenticeship, on-the-job-training, paid work experience, paid internship)? **(RQ15)**

70. Are these education and training services unique to the grant or provided in coordination with an existing program? (e.g. WIOA, community college career services) **(RQ2)**

71. Are other education services available, such as remediation, for those in need? Are they paid through the grant or some other source? **(RQ15)**

72. How have regional service delivery systems been affected by [PROGRAM NAME]? **(RQ1, RQ5)**

73. What best practices for delivering career pathways-based training have been developed under the grant? **(RQ21, RQ22)**

74. Did your program adjust its training offerings or delivery methods due to COVID-19?

1. Classroom training

75. Please describe the classroom training offerings provided through [PROGRAM NAME]. For each offering:

- a. Who provides the training? **(RQ16)**
- b. Is it sector-specific? **(RQ4)**
- c. What are the eligibility requirements for enrolling in training? For example, do participants need to have a certain level of literacy or numeracy skills? **(RQ23)**
- d. Is it part of a degree program? **(RQ4, RQ15)**
- e. Does the training lead to an industry-recognized credential? Specify. **(RQ15)**
- f. What occupations are participants prepared for through this training? **(RQ4, RQ15)**
- g. How long is the training in terms of years, months, weeks? How many hours per week? **(RQ15)**
- h. When is it offered? Is classroom training offered on a rolling basis? Or is it offered by semester or by cohort? **(RQ15)**

76. Are classroom training offerings specific to [PROGRAM NAME] -- that is, classrooms only contain [PROGRAM NAME] participants? **(RQ2, RQ15)**

77. How many individuals total ([PROGRAM NAME] and others) are in class together? What proportion are typically from [PROGRAM NAME]? **(RQ4, RQ15, RQ17)**

78. What challenges do [PROGRAM NAME] participants face in engaging in classroom training offerings? For example, lack of transportation or child care, lack of interest/motivation, competing priorities such as immediate work. **(RQ18, RQ19, RQ21, RQ25)**

79. What supports (such as transportation, childcare, or a stipend payment for time in class) are available to [PROGRAM NAME] participants enrolled in classroom training? Who pays for these services? Do they cover the needs that you identified earlier? **(RQ18, RQ19, RQ21, RQ25)**

80. Is classroom training typically coordinated with work-based learning activities? **(RQ15, RQ16, RQ17)**

- a. If not, why? **(RQ15, RQ16, RQ17)**
- b. If so, are they sequential or simultaneous? How is the content aligned? **(RQ15, RQ16, RQ17)**

2. Work-based learning

81. Please describe work-based learning offerings available to [PROGRAM NAME] participants. Does the program offer:

- a. On-the-job training or incumbent worker training? **(RQ15)**
- b. Apprenticeships and/or pre-apprenticeships? **(RQ15)**
- c. Paid work experience? **(RQ15)**
- d. Internships? **(RQ15)**

82. For each work-based learning option:

- a. How are participants selected for the offering across different employers? **(RQ8, RQ17)**
- b. What role do employers play in selecting participants in the offering? **(RQ8, RQ16)**
- c. What are the eligibility requirements? **(RQ23, RQ24)**
- d. How many participants have enrolled in this type of work-based learning? **(RQ26)**
- e. How many employers offer this option? How many participants does each employer work with (range and/or typical number)? Do employers commit to hiring workers after they completed their work-based learning? **(RQ15, RQ17)**
- f. How long does the offering last? How many hours per week do participants participate in the offering? **(RQ15)**
- g. Are participants paid during training? How much? By whom? **(RQ15)**
- h. What other supports do participants receive during training? **(RQ16, RQ17, RQ18)**

83. [For grantees offering incumbent worker training] How are employers identified for incumbent worker training? What are employer eligibility requirements for incumbent worker training? **(RQ16, RQ23)**

- a. Please describe the process for identifying training offerings made available to incumbent workers. **(RQ8)**
- b. Are their eligibility requirements for incumbent workers trained through [PROGRAM NAME]? **(RQ23)**
- c. Are raises or new jobs (at higher skill levels) a part of the offering? **(RQ18)**

84. How does the grantee monitor work-based learning activities? What data are collected from providers/employers (such as attendance and quality of performance)? How often? **(RQ15)**

85. What concerns have employers expressed regarding participating in work-based learning? How are these concerns addressed? What is the communication between program staff and employers providing the work-based learning? **(RQ8, RQ16, RQ21)**

D. Job development/job placement services

86. Please describe job development/job placement services provided to [PROGRAM NAME] participants.

- a. Which organizations and which staff within those organizations provide these services? **(RQ9, RQ16)**
- b. Are the services unique to [PROGRAM NAME] or provided in coordination with other services? Is there dedicated staff providing these services? **(RQ2, RQ15)**
- c. How do [PROGRAM NAME] job development/job placement staff coordinate with other organizations providing these services? **(RQ6, RQ16)**
- d. Do all [PROGRAM NAME] participants receive job development/job placement services? If not, how is it determined who will receive these services? **(RQ17)**
- e. When do participants begin meeting with job developers/job placement staff? Before, during or after completion of training? How often do they meet? Typically for how long? **(RQ15)**

87. Do participants receive ongoing job retention services once they find a job? What does it consist of and is it provided to all participants? If not, how is it determined who receives this service? **(RQ15, RQ20)**

E. Supportive services

88. Please describe supportive services (such child care, transportation, payment for work tools, books, uniforms, etc.) available to [PROGRAM NAME] participants. **(RQ16, RQ17, RQ18, RQ25)**

- a. Who provides these services? **(RQ16, RQ17, RQ18)**
- b. Are these services funded by the grant? If yes, what portion? **(RQ15)**
- c. Are all participants eligible for supportive services? If not, what are the eligibility requirements for receiving these services? **(RQ17, RQ23, RQ26)**
- d. How are participants connected to the services? Is it a component of case management? **(RQ16)**
- e. What COVID-19 related barriers did participants report to engaging in services? What supportive services did they access to help overcome those barriers?
- f.

89. If supportive services are not grant-funded, please describe how participants are referred to other organizations for supportive services. **(RQ16)**

90. What organizations and services are participants commonly referred to for supportive services? **(RQ6, RQ16)**

91. What supportive services do participants typically require? **(RQ16)**

92. Are these services typically available in the local community? **(RQ2, RQ6)**

93. Is the program able to sufficiently address participants' supportive service needs? If not, what are the gaps and /or challenges? **(RQ18, RQ20)**

IV. ALTERNATIVE SERVICES, OUTCOMES, AND SUSTAINABILITY

A. Alternative services

94. Are any of these other programs similar to [PROGRAM NAME]? If so, how are they similar and how are they different? **(RQ2)**

a. Please describe any current programs or services **(RQ2)**

b. How long have these programs been in place? **(RQ2)**

c. Which organizations run these programs or services? **(RQ2, RQ5)**

d. What is the funding source for these other programs? Is it public or private funding? **(RQ4, RQ5)**

e. What is the target population for these programs? **(RQ2, RQ23, RQ24)**

95. Does the presence of other service organizations affect what you do or how you serve individuals? Does the presence of other service organizations affect [PROGRAM NAME] target population and recruitment strategies? **(RQ2, RQ16)**

96. To what extent are the services you provide the same or different from other services that are available in the community? **(RQ3, RQ5)**

97. To what extent are you satisfied with the services being delivered through [PROGRAM NAME] compared to alternative options? For example, do you think they are appropriate in terms of the types of services provided, their intensity, and topics? **(RQ22)**

98. Are there any additional services you think would be useful to participants? **(RQ18)**

B. Participant Outcomes

99. Among [PROGRAM NAME] participants, about what percentage of participants complete the program and exit services? How much of a challenge was retaining participants? What was your targeted completion rate? What was your actual completion rate **(RQ19, RQ25)**

100. Among those who do not complete services, what are the primary reasons that participants drop out of services and/or do not complete training? What barriers do participants face in remaining engaged in services? Does the program use any incentives and/or supportive services to keep them engaged? **(RQ19, RQ25)**

101. What percentage of participants find employment? How often is that job related to the industry or occupation for which they received services and training? Are these usually full-time or part-time? What are typical salaries? **(RQ20)**

102. What barriers do participants face in finding jobs? What strategies do you use to help them overcome those barriers? What strategies appear most successful? **(RQ20)**

103. What outcomes matter most to your organization? Why are these outcomes important? To what extent have you been able to achieve these outcomes? What outcomes are you measuring and how? **(RQ20, RQ26)**

104. Among participants who received multiple services, do any specific combinations of services work well or not work well together? Are there any additional supportive services, or job development services that you think would benefit participants? **(RQ17)**

C. Plans for continued partnerships and promising practices

105. Which partnerships do you think are/would be most likely to last after the grant funding ends? What partnerships are likely to end? Why? **(RQ10, RQ14)**

a. What steps are you taking now to ensure sustainability of the partnerships? **(RQ14)**

b. What changes to partnerships, if any, must be made to sustain the effort? **(RQ11, RQ14)**

c. What methods of communicating or coordinating across partners are likely to be sustained? **(RQ13)**

d. Do you plan to add any partners? If so, which partners and why? **(RQ14)**

e. What are the key challenges you anticipate in sustaining partnerships? **(RQ14)**

106. How have service delivery systems in the region been affected by the [PROGRAM NAME] program? What changes, if any, have you noted in workforce development, higher education, or economic development systems? **(RQ2, RQ3, RQ6)**

107. How satisfied have you been with the [PROGRAM NAME] effort in general? What do you perceive as the most successful aspects of service provision? What are the least successful? What improvements or changes to the services would you like to see? **(RQ16)**

108. How successful has the [PROGRAM NAME] partnership been, from your perspective? Why do you think it has/has not been successful? **(RQ13)**

109. Have these partnerships influenced the region's continuous improvement efforts in serving individuals and employers? If so, in what ways?

110. What challenges, if any, have you encountered in working with participants? What steps have you or the [PROGRAM NAME] partners taken to address these challenges? **(RQ21, RQ25)**

111. What promising practices for delivering sector-based career pathways services and training have been developed under the grant? **(RQ4, RQ5, RQ8)**

112. What have been the promising practices for collaboration (for example, frequent meetings, soliciting ideas for shared vision)? **(RQ13)**

113. What have been the key challenges to collaboration (for example, time requirement, conflict between partners, data-sharing issues)? **(RQ12)**

114. What do you think will be the most lasting value to your organization from having implemented [PROGRAM NAME]? **(RQ22)**