Appendix A  
  
Discussion guides for Navigators, administrators,  
and partners

Discussion GUIDEs FOR NAVIGATORS, ADMINISTRATORS, AND PARTNERS

In this appendix, we provide a checklist of topics we will cover during site visit semi-structured discussions with program and partner administrators and staff. Not all topics are applicable to all states or respondents. Mathematica likely will not cover all topics with a single respondent. For example, the administrative structure and staffing for the navigator program will be the focus of discussions with the TAA state administrator; program implementation will be the focus of discussion with Navigators. We will tailor the discussion guide for particular states and respondents, and we will build on information we obtain from state clarifying calls and TAA administrative data.

Prior to the discussions, Mathematica will present the following language to each respondent: Public reporting burden for this data collection instrument, is estimated to average 90 minutes per response. The burden estimate includes the time for reviewing instructions, searching existing data sources, gathering, and maintaining the data needed, and completing and submitting discussion. This collection of information is voluntary. You are not required to respond to this collection of information unless it displays a valid OMB control number. Please send comments regarding the burden estimate or any other aspect of this collection of information to the Chief Evaluation Office, U.S. Department of Labor, 200 Constitution Ave NW, Room S-4307, Washington, DC 20210 and reference OMB control number 1290 – 0043.

1. Respondent background
2. Name, title, and organization/affiliation
3. Role(s) in the TAA program currently
4. Length of involvement with TAA and TAA Navigators
5. Previous work/roles in other workforce programs, state government, etc.
6. Training/educational background
7. Economic context/participant characteristics
8. High-level trends in which industries/communities have been affected by recent trade-related layoffs
9. Demographics of trade-affected workers and barriers to access to employment and training services
10. Trends in layoffs, petition filing and participant characteristics
11. Background on TAA Navigator model
12. Reasons for developing the TAA Navigator positions
    * 1. How learned about different navigator models
      2. Data reviewed/analyzed
      3. Equity considerations
13. History and evolution of navigator positions
    * 1. When developed and implemented
      2. How and why changed over time
14. Reason for implementing your state’s specific model
    * 1. How and why chosen
      2. Goals of navigators
      3. Models and components considered but not adopted
15. Partnerships
16. Main partner organizations that are involved with navigator program
17. Coordination activities of navigators
18. Navigator Role/Responsibilities
19. Types of navigator activities and services provided
    * 1. Outreach and education
      2. Investigation of potential petition filing opportunities
      3. Outreach to employers
      4. Outreach to potentially-eligible workers
      5. Petition filing
      6. Case management services
      7. Typical caseload for navigators
      8. Role assisting participants with enrolling in training
      9. Role assisting TAA participants with finding employment
      10. Average length of time participants receive services
      11. Frequency of service receipt or meetings with navigators
      12. Follow up services and maintaining contact with participants
      13. Outreach to employers for work-based-learning opportunities and placement services
      14. Outreach for OJT and apprenticeship
      15. Outreach for TAA participant placements
      16. Providing assistance to case managers (if applicable)
      17. Helping to connect them with partners who are not responding
      18. Helping them to reach non-responsive partners
      19. Monitoring key data/reports (such as missing performance data on credentials) and ensuring that case managers follow up
      20. Training/supervising case managers
      21. Cross-program coordination and systems feedback
      22. Coordination with partner programs
          1. Coordination with Rapid Response
          2. Coordination with WIOA Dislocated Worker program
      23. Extent of co-enrollment with WIOA Dislocated Worker program
      24. Typical division of tasks/roles for TAA Navigator and WIOA case manager
    1. Coordination with AJC business services teams
    2. Other coordination with AJC partners
20. Navigator characteristics/ activities that support collaboration
21. Sharing of participant information and other data across partners
22. Changes in partnerships since Navigators positions were rolled out
23. Challenges working with partners
24. Program improvement activities
    * 1. Other Navigator activities
25. Where and how services are delivered and activities are conducted
    * 1. Use of technology, automation or artificial intelligence
26. If/how activities and services were tailored for different populations
27. Success, challenges, and promising strategies related to navigator activities
28. Changes made to model or implementation over time and whether successful
29. Administrative structure and staffing for state TAA program and navigators
30. Role of case managers (if used), differences/similarities to Navigators
31. Location, and numbers of Navigators and TAA case managers (e.g., whether they serve only TAA or other participants)
32. Location (AJCs or centralized), number, and high-level roles of other TAA staff
33. Overall structure of oversight and staffing for TAA navigators
34. Primary navigator supervisor/oversight roles and responsibilities
35. Navigator hiring process, including required experience, skills, and abilities
36. Navigator training and professional development, including connections to the community served
37. Navigator turnover
38. Data Collection and Participant/Program Outcomes
39. How TAA leadership measures navigator success
40. What additional data on Navigators are collected, such as:
    * 1. Numbers of petitions filed by Navigators
      2. Program access issues and how Navigators assisted with addressing them
41. Findings regarding TAA participant outcomes, equity, and program access  -- since Navigators have been in place.
42. Successes, challenges, and lessons learned related to data collection and measurement
43. Successes and Challenges/Barriers
44. Successes and challenges in starting up and using Navigators
45. Challenges affecting whether program participants are able to achieve positive outcomes; logistical challenges to program participation
46. Solutions tried to mitigate challenges
47. Program improvements made to better serve target populations
48. Perceptions about effectiveness of the Navigator(s)
    * 1. Component of navigator model with biggest perceived impact
      2. Key program elements for successful navigator model
49. Plans for the Future
50. Interest in expanding/enhancing/continuing the state’s navigator roles/positions
51. Factors for determining whether and when expansion/enhancement will occur
52. Alternative approaches to meeting program goals without navigator positions
53. Facilitators and barriers to expanding/enhancing/continuing navigator positions

**NOTE TO INTERVIEWER:** Some states may also refer to TAA Navigators as Petition Coordinators. In some states this is one of the roles of the Navigator, but in other states the only portion of the Navigator model that has been operationalized is the Petition Coordinator function.