



Learning to Thrive:

How data can fuel better workforce development results

Lessons from the Twin Cities Benchmarking Initiative

May 2017



CSW
Corporation for a
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**WORKFORCE
BENCHMARKING
NETWORK**

PUTTING DATA TO WORK

Acknowledgements

This report was authored by **Taryn MacFarlane** and **Marty Miles** of the Workforce Benchmarking Network (WBN), with contributions from Megan Elyse Williams and Kysha Frazier at Corporation for a Skilled Workforce. Stacy Woodruff was also a key member of the CSW Benchmarking team in the Twin Cities in 2013-2015. The WBN and CSW thank Bob Tobin and Meghan Kraley at the Williams Group for their feedback during report development.

The WBN is grateful for the long-term investment and commitment to Benchmarking from local funders in Minneapolis and St. Paul, Minnesota. They were essential partners in the design and implementation of this work and thoughtful reviewers of the report. These are:

- ◆ Andriana Abariotes and Brett Costain, LISC Twin Cities and Chris Wiger, formerly at LISC Twin Cities
- ◆ Joel Luedtke, The Jay and Rose Phillips Family Foundation of Minnesota
- ◆ Rachel Speck and Andrea Ferstan, Greater Twin Cities United Way
- ◆ Brian Paulson, formerly at Greater Twin Cities United Way, now at the Pohlada Family Foundation, and current CSW board member

Most importantly, thanks to the 20 service providers and staff for their work and enthusiasm as part of the Twin Cities Benchmarking Initiative!



**Greater Twin Cities
United Way**
gtcuw.org



The WBN and CSW would also like to acknowledge the funders who have supported the Workforce Benchmarking Network over the past decade, most especially the Annie E. Casey Foundation for being a founding supporter of the Network. Past and current funders in other cities where initiatives like this have taken place or are underway include: The Boeing Company, JPMorgan Chase Global Philanthropy, the Chicago Community Trust, Chicago Tribune Charities (a McCormick Foundation Fund), the Communities Foundation of Texas, the Lloyd A. Fry Foundation, the New York City Workforce Funders, Polk Bros Foundation, and the United Way of Metropolitan Dallas.

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“We often frame our support as capacity building, which can feel binary—you either have capacity or you don’t. Benchmarking is more about growing competencies among staff and organizations—it represents an evolution of sophistication in our sector, since we have to manage to a complex level of performance and accountability in workforce development. And yet, the competencies of becoming a learning organization and mining data for improvement translate across all sectors.”

- Andriana Abariotes, Executive Director, LISC Twin Cities



Twin Cities Benchmarking: Overview

On-the-ground Benchmarking: Improving employee retention in Minnesota hotels

In late 2015, staff from the International Institute of Minnesota's Hospitality Program hosted 27 hospitality industry representatives—including supervisors, human resources representatives, general managers, and program graduates—to explore “Strategies for Decreasing Turnover in Housekeeping Positions.” The event began with a presentation of compelling information from the first two years of a program created to help recently-arrived immigrants find employment in the industry. It featured findings from data analysis as well as conversations with program graduates about factors that directly affected job retention—including pay rates, schedules, travel time, physical demands of the job, English language levels, and a variety of employer practices. Institute staff described program enhancements to be adopted based on this data and engaged the employers in dialogue about ways all in the room might support better job retention. Informed by data, and by conversation about the implications and possibilities it surfaced, the Institute and the employers made changes that helped boost one-year employee retention rates from 44% to 60%—with an average wage increase from \$9.98 to \$10.70.

Income gaps are widening for families in our communities. More than ever, it's critical that low-income, low-skilled persons access the training and other support needed to obtain quality, family-sustaining jobs. Community-based organizations that provide workforce development services are deeply committed to this mission—and strive hard to produce better results. It's challenging work to thoroughly understand and address both employer needs and those of job seekers who may face multiple challenges. Meanwhile, the competition for resources grows increasingly tight, as federal funding declines¹ and local funders seek to invest in organizations with tangible, positive long-term results.

Indeed, there is a growing expectation that all nonprofits—including those providing workforce services—need to be “high performance organizations” that deliver meaningful, measurable, and financially sustainable results for the people they serve. Some ingredients of high-performing organizations are well-defined, such as strong leadership, well-formed program models, and effective service delivery. But there is heightened appreciation for the essential role that a data-informed culture of learning plays in organizational success and sustainability.²

In this context, in 2013 the Greater Twin Cities United Way (GTCUW) and the Jay and Rose Phillips Family Foundation of Minnesota set out to help community-based workforce development organizations build their capacity for learning—including the use of data to enhance results. Later joined by LISC Twin Cities, these funders contracted with Corporation for a Skilled Workforce (CSW) to lead this effort by bringing the tools and insights of its *Workforce Benchmarking Network* to the Minneapolis-St. Paul (Twin Cities) area.

¹National Skills Coalition: [Invest in America's Workforce: We Can't Compete if We Cut](#)

²See [The Performance Imperative](#) by the Leap of Reason Ambassadors Community, which includes more than 150 nonprofit, funder and policy leaders across the social sector.

Since 2004,³ the Workforce Benchmarking Network has helped nonprofit workforce organizations move well beyond collecting data for funder compliance requirements to embracing data as a rich resource for growing knowledge, approaches, and impact. *The Benchmarking approach is based on the belief that an active learning culture around data is vital to innovation, adaptation, and resilience—three essential traits for any nonprofit that wants to remain relevant in a dramatically changing environment and era of shrinking resources.*

This report describes the multi-year Twin Cities Benchmarking Initiative: its design and approach to capacity building, the role of funders in nurturing culture change, and the results achieved. It highlights the examples, lessons—and promise—that findings hold for workforce development nonprofits and their funders in other locales across the nation.

About the Workforce Benchmarking Network

The Workforce Benchmarking Network (WBN) connects community-based organizations providing workforce development services across the nation—along with public and private funders and other intermediaries—to support better results for job seekers, employers, and communities. Started in 2004 with support from the Annie E. Casey Foundation, the WBN has collected results data on more than 500 programs operated at more than 200 organizations. For more than a decade it has increased the field’s knowledge about what “good” performance looks like, with the nation’s largest dataset of outcome information for nonprofit workforce service providers.

Housed at Corporation for a Skilled Workforce, the WBN makes quality data about program services and outcomes available, and builds the field’s capacity to *use* that data to create more effective programs and policies. Engaged at the organizational, community, and national levels, the WBN:

- ◆ Conducts data analysis of program-level outcomes among similar organizations across the nation, generating true “apples to apples” comparisons that enable new understanding and insight for program leaders.
- ◆ Expands the ability of community workforce development providers to use data for continuous improvement, helping them strengthen their learning culture as a means to high performance.
- ◆ Spotlights the practices and strategies of high-performing programs.
- ◆ Partners with funders, providers, and other stakeholders to tackle system-wide policy issues and enhance data reporting, to generate a more comprehensive picture of workforce outcomes across fragmented funding streams.

For more information, please see the Workforce Benchmarking Network [website](#).

³In 2004, with support from the Annie E. Casey Foundation, Public/Private Ventures (P/PV) launched The Benchmarking Project to better understand the results of local workforce development programs. With P/PV’s closing in 2012, The Benchmarking Project entered into partnership with CSW and became the Workforce Benchmarking Network. CSW believes the Benchmarking work is an essential part of strengthening local and national capacity to respond to existing and emerging workforce needs.

Twin Cities Benchmarking Initiative-at-a-Glance

The Twin Cities Benchmarking Initiative involved 20 workforce development organizations, three years, two primary funders, and one intermediary organization. Its activities included a program outcomes data survey “benchmarking” organizations’ program outcomes against national averages, peer learning events, and individualized technical assistance. The initiative generated improvements in specific performance measures or short-term process milestones that each organization deemed core to their mission and priorities.

Assessments point to stronger learning cultures that more deeply value and operationalize the use of data for improvement. Staff are equipped to better analyze their own data, spotlight key process inefficiencies, and sharpen strategies that work.

Key lessons for workforce development organizations and leaders

1. Senior leaders must champion the shift to using data for learning, not just accountability
2. Time for reflection on data and its implications must be embedded in program operations
3. Data need to be visible, accessible, and useful for all staff, not just managers
4. Identifying “result leaks” in work processes and disaggregating data focuses improvement efforts
5. Engaging staff across functions and levels yields better “hunches” and sets the table for better results
6. Adopting a learning culture matters—and requires sustained attention

Key lessons for funders and capacity builders

1. Ensure organizations formally commit to the improvement process and are able to drive its focus
2. Provide adequate time and frequent opportunities for staff to learn and apply the approach
3. Design for peer learning and connection across organizations
4. Invest in direct technical assistance to internalize an improvement culture within organizations
5. Be “learning partners” in this work with grantees

“Often in this field there’s a sense of ‘just try harder.’ Investing in Benchmarking meant reinvesting in organizations we were already funding to help them increase their capacity to learn and improve on their own. In that sense, we want to give them new tools to work smarter, not just ask them to keep working harder.”

-Joel Luedtke, Senior Program Officer, The Jay & Rose Phillips Family Foundation of Minnesota



Table 1: Twin Cities Benchmarking Results-at-a-Glance

| Phase Two Organizations | Improvement Area | Results |
|---|--|--|
| AccessAbility* | <i>Enrollment</i> | Exceeded enrollment goal by 9% , supported by data analysis of program process flow to drive needed adjustments |
| CAPI | <i>Job Placement</i> | Increased job placement rate for refugees by 20% after improving cross-program referral process |
| Comunidades Latinas Unidas En Servicio (CLUES)* | <i>Job Placement (part of financial stability)</i> | Rate of clients achieving financial stability goal improved to 49% after new program launch |
| CommonBond Communities | <i>Job Placement</i> | Increased average wage by 12% after deeper data analysis informed targets for employer relationship building |
| East Side Neighborhood Services | <i>Enrollment</i> | Increased enrollments by 5% after improved outreach more than doubled attendance at information sessions |
| Emerge | <i>Job Placement</i> | Increased staff engagement with data after significant work on making agency data communication more useful and accessible |
| Goodwill-Easter Seals Minnesota (Disabilities Div.) | <i>Job Placement</i> | Increased job placement rate by 7% after improvement in referrals to job search services |
| International Institute of Minnesota | <i>Retention</i> | Increased 12-month job retention rate by 36% after addressing various factors affecting Hospitality Program results |
| Jewish Family & Children's Service-Minneapolis | <i>Job Placement</i> | Increased number of corporate volunteers and improved staff use of data through focus on deepening employer engagement |
| Jewish Family Service-St. Paul* | <i>Job Placement</i> | Increased number of people placed by 88% over prior year, through improved client interactions and staff communication |
| Lifetrack | <i>Job Placement</i> | Decreased time-to-placement by 14% through consistent use of placement data for various sub-groups |
| Pillsbury United Communities* | <i>Data Quality</i> | Took control of data quality and process to inform referrals into job search programs, as a baseline for future improvement |
| Project for Pride in Living (PPL) | <i>Job Placement</i> | Increased job placement rate from 58% to 84% for occupational training program, concurrent with improved data collection process |
| RESOURCE | <i>Enrollment</i> | Decreased attrition rate (from intake to enrollment) for two programs, with a 14% improvement for Career Education |
| Summit Academy OIC | <i>Enrollment</i> | Achieved highest enrollment ever in part by decreasing attrition rate between information sessions and enrollment by 16% |
| Twin Cities RISE | <i>Job Placement</i> | Reduced program attrition rate from 50% to 31% through deep staff engagement in program redesign |
| *Joined the Benchmarking Initiative at the start of Phase Two | | |
| NOTE: American Indian OIC, HIRED, Minneapolis Urban League, and Momentum Enterprises participated only in Phase One, so they do not have specific improvement project results. | | |

Continuous Improvement and Workforce Development

The strategies and intent of the Workforce Benchmarking Network build on decades of work in continuous improvement. Since W. Edwards Deming’s pioneering work in the 1930’s on a “Plan-Do-Check-Act” cycle—and now through approaches like Kaizen, Six Sigma, and Lean—businesses continue to achieve better results by engaging employees at all levels in using data and feedback to make steady improvements leading to better results. The healthcare field strengthens provider quality and reduces costs through data-driven approaches, aided by organizations like the Institute for Healthcare Improvement. In the nonprofit and government sectors, organizations including (but far from limited to) the Urban Institute, Bridgespan, the Leap of Reason network, and Results4America are working to build capacity in those sectors.

Continuous improvement approaches are hardly new to the workforce development field, especially within federal and state agencies. The Workforce Benchmarking Network’s 10-year history is a testament to growing interest in data as fuel for performance among community-based nonprofit providers; its most recent Benchmarking data survey included 259 programs across 26 states.⁴ The WBN has also been on the ground, intensively building capacity in other cities including Chicago, Dallas-Ft. Worth, and New York City. The [2013 WBN Nurturing Inquiry and Innovation report](#) highlighted initial lessons and results from work with 16 organizations. Through this new report, the WBN team adds to the growing experience with continuous improvement in the workforce development field.

“The best way to get line staff to value data is to show them how it connects to helping the people they care about.”

-Margie Earhart, Career Services Director, Jewish Family and Children’s Service of Minneapolis



Workforce Benchmarking Network Principles

Over a decade of working with community-based organizations and their leaders to drive a learning culture around data is reflected in these five key Benchmarking principles:

- 1. Focus on the data that matters to YOU (your mission, goals and processes)**
- 2. Engage staff’s “inquisitive mind” about results**
- 3. Help staff experience the benefits of data for their work**
- 4. Create systems to strengthen data quality**
- 5. Invest time continually to learn and improve**

⁴Workforce performance outcomes and analysis for the 2010-2014 period can be found here: [Apples to Apples DATA UPDATE](#).

Twin Cities Benchmarking: A Powerful, Practical Approach




On-the-ground Benchmarking: Reaching new job placement heights at PPL

Project for Pride in Living (PPL), a nonprofit focused on affordable housing and employment readiness for area residents, sought to improve the job placement and job retention rates of its career pathway employment training programs. One of these employment training programs is implemented through a partnership with Hennepin County's Human Services department, where program graduates are hired by the County on a probationary status. PPL wanted to ensure that more students succeeded in this probationary term and secured jobs with the County. Using Benchmarking approaches, this team created a more comprehensive and efficient online reporting tool that allowed program staff to document interactions with students, which would then allow them to determine which interactions have the most impact on students' ability to be successful on the job later. Program improvements made over time are correlated with improved student outcomes: as of June 2016, 28 of 31 students were hired by the County after the six-month probationary period. This 90% success rate reflects an improvement compared with the first cohort placed with the County in 2015—in that cohort only 50% of students were hired following their probationary employment.

Benchmarking Initiative Design

Workforce Benchmarking Network staff partner with funders in local communities, informed by service provider input, to shape an integrated capacity building and technical assistance strategy. In the Twin Cities, there were two phases of work over three years (Fall 2013 through Summer 2016). Phase One introduced key Benchmarking principles and tools via a workshop series and peer learning forums, while collecting and analyzing providers' outcome data against the WBN national dataset. Phase Two was designed to drive the use of data for improvement even deeper within organizations through a longer-term focus on one tangible performance measure (which they selected). Organizations received individualized technical assistance from WBN staff to support their reflection and work on that focus area.

Twin Cities Benchmarking Initiative Design

| | Design Component | Phase One (2013-2014) | Phase Two (2015-2016) |
|--|---|---|---|
|  | Data | Organizations receive Benchmarking reports against national dataset | Each organization identifies milestone and outcome data for improvement project |
|  | Peer Learning | Three introductory workshops and four quarterly peer forums | Three peer forums (every six months); introductory workshop for new organizations |
|  | Organizational Performance Improvement | Quarterly mini-projects, using ideas from peer forums | Improvement project focus over the course of one year |
|  | Organizational Data Culture | Completion of data culture self-assessment | Completion of data culture self-assessment at start and finish of phase |
|  | Senior Leadership Engagement | CEO/senior leader breakfasts; attendance at final forum | Leaders engage via site technical assistance; attendance at final forum |

Key Design Components

Data: WBN created baseline “benchmark” data of workforce providers’ outcomes against the WBN national dataset, so that organizations could see how their results compared to similar organizations.

Peer Learning: A set of peer learning experiences where organizational teams attended workshops and forums with other organizations. WBN staff trained teams on specific continuous improvement tools and strategies in the context of workforce development program offerings.

Organizational Performance Improvement: Structured applied learning opportunities for staff teams to use the tools and approach within their own organization through mini-projects and longer-term improvement projects.

Organizational Data Culture: Organizational staff used the Benchmarking data culture self-assessment tool to catalyze helpful internal dialogue about how data is shared and used. It inspired strategies focused specifically on strengthening overall organizational culture around learning and improvement.

Senior Leadership Engagement: CEOs were engaged directly through specific briefings and as part of onsite technical assistance visits. They were also invited to attend some peer forums.

The Benchmarking Continuous Improvement Process

Continuous improvement projects focus on making incremental improvements within a program's process flow. With effort and over time, these targeted improvements result in notable changes in overall organizational performance.

In Phase Two of the Benchmarking Initiative, organizations selected a larger *performance area*—such as job placement or retention—to focus on for an improvement project. Typically, organizations had already set performance targets at this level (prior to the Benchmarking work) in their standard planning process and funding applications. Organizations created teams including managers and frontline staff to implement continuous improvement strategies over twelve to eighteen months related to the performance area they had chosen.

As seen in Figure 1, teams then identified key *milestone measures* in their targeted process (e.g., program completion rates as a milestone to placement). They used data to identify where there was a *leak* or gap in achieving those milestones (e.g., discovering that a significant percentage of participants who don't complete the program drop out in the first month of services). Addressing this leak gave frontline staff a more tangible goal that they could focus on in their daily work and data they could use to explore their *hunches* about factors influencing the dropout rate. What kinds of process changes could the team make that would decrease program attrition in the first four weeks (their *focus measure*)? Developing *change ideas* to decrease attrition rates could eventually improve completion and job placement results.

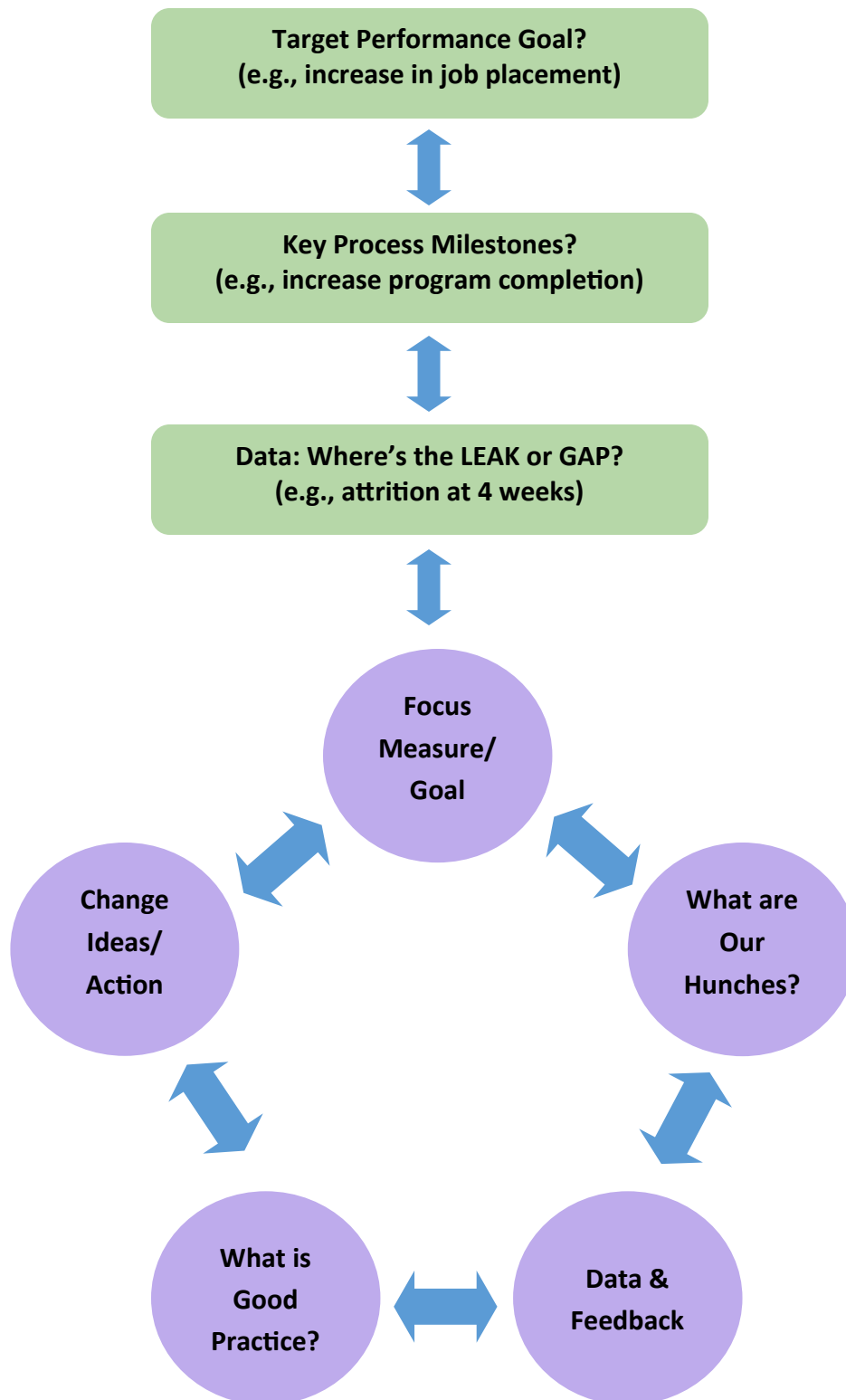
“Diving deeper into the milestone data helped us see that what we thought was a placement problem was really an internal referral issue! It gave us the nudge to understand how different sub-groups are progressing, highlighting racial disparity issues we wouldn't have known about.”

- Lisa Guetzkow, Workforce Development Employment Services
Director, Goodwill-Easter Seals Minnesota



A second and equally important goal of the Benchmarking Initiative was to support culture change to reinforce adoption of continuous improvement tools. During their improvement projects, organizations intentionally worked to strengthen their culture around the use of data for learning and improvement, e.g., ensuring that data around program attrition was kept visible and discussed as a regular part of staff meetings.

Figure 1: Benchmarking Improvement Process



Terms and Definitions

Performance Goal

Highest level performance result or outcome

Process Milestone

Interim result on the way to achieving performance goal

Leak

Point in process with significant gap between expected and actual milestone result

Focus Measure

An indicator to measure improvement toward expected milestone result (addressing a “leak”)

Hunches

Staff team hypotheses about factors influencing the leak, generated through tools like the Fishbone (cause and effect diagram)

Change Ideas

Changes in process steps intended to move the needle on focus measure and milestone results, eventually leading to achievement of performance goal

Twin Cities Benchmarking: Better Results

Improved Performance

As a result of their Benchmarking work, all 16 organizations in Phase Two activities achieved better results at the program level *or* made important progress in an area of focus they believe will ultimately contribute to better participant results. As described in the chart on p. 7,

- ◆ **Ten** saw improvements in the larger performance area they were targeting (e.g., program enrollment, job placement, or job retention).
- ◆ **Three** saw improvements in their specific focus measure (e.g., reducing the number of program dropouts at four weeks), but as of the time of this report had not yet seen improvement in their larger outcomes.
- ◆ **Three** organizations, several of whom were newer to the Benchmarking process or who had experienced significant staff turnover, did not see improvements in their metrics. But they did report very positive changes in data quality and overall data culture, as described in the next section.

On-the-ground Benchmarking: Gaining the benefit of bundled services at CLUES

Increasing economic stability is a primary mission for Comunidades Latinas Unidas En Servicio (CLUES), a multi-service agency and LISC Financial Opportunity Center serving the Twin Cities Latino population. The CLUES team knew intuitively—and research has shown—that clients who receive bundled, mutually reinforcing services related to financial literacy, income support, and employment assistance are more likely to experience desired program outcomes like increased net income. But the CLUES team was always working harder—seeing more and more clients—and had little time to analyze their data to determine where they should focus their efforts to improve results.

CLUES staff worked with their Benchmarking coaches to disaggregate data about clients who received only one service compared with those who received two or three. The data showed that focusing on the pool of clients who had three services would generate the largest increase overall in economic stability; once a client had received three services, the likelihood of improving their net income was twelve times that of clients with only one service (2.4% vs. 29.2%).

Instilling a discipline of data review pushed the team to new process efficiencies—and inquiries. How could staff increase its ability to transition single-service clients to a second offering and shorten the time it took clients to attain that vital third service? How much lag time did clients experience in scheduling appointments, as prolonged wait time would be a barrier to adding a new service? Once clients completed a second service, which was the most common third service, and why, and for what demographic?

Exploring the data and implications of these questions afforded the team solid data and insights used to truly influence future program development. CLUES' new Bridge to Your Future program, launched in 2016, integrates all three services into core programming. At the close of 2016, almost 50% of participants receiving three services had met a financial stability outcome; the few who received one or two had not met any financial stability outcome.

Improved Learning Culture

An organization committed to increasing staff’s appetite for learning and engagement with data is positioned for long-term success, even if specific improvement strategies have yet to bear fruit. Not all change ideas will pay off and setbacks will happen, but a strong culture of learning will support staff to persist in identifying what works and reaping lessons from what does not.

The WBN worked with organizations to track how their data culture changed over time, using a self-assessment based on the Benchmarking principles.⁵ In Phase Two, organizations took the survey both at the beginning and the end of their improvement projects, and WBN staff facilitated discussions with team members about the findings.

Table 2: Six strategies from the assessment tool showed the largest improvement in average ratings⁶:

| Strategies with most improvement: | First Rating | Second Rating | Change |
|--------------------------------------|--------------|---------------|--------|
| Engagement in testing hunches | 2.6 | 3.3 | 33% |
| Strong customer feedback processes | 2.6 | 3.6 | 29% |
| Celebrating improvement | 3.2 | 3.6 | 14% |
| Seeing failure as opportunity | 3.2 | 3.6 | 14% |
| Aligned progress milestones | 3.2 | 3.5 | 12% |
| Resources for continuous improvement | 3.1 | 3.4 | 10% |

Organizations also reported specific behavior changes they saw as a result of the Benchmarking Initiative. Overall, senior leaders, managers, and frontline staff reported *increased engagement with data*, as staff generated and discussed reports on their priority challenges. This shift in behavior reflects one of the core principles of Benchmarking: focus on the data that matters to you, your participants, and your organization—rather than just what matters to your funders.

They also reported that *staff asked more questions* as they sought to understand what data meant or to test a hunch about the factors related to performance on a particular measure. Why, for example, were program graduates not retaining their jobs? When organizations deliberately combined data use with thoughtful conversations with participants and employers, they moved beyond anecdotes to generating collective knowledge about “what works” that ultimately could improve program design.

“Benchmarking has revolutionized how we think about our services. It used to be that we looked at data primarily around two questions: How many did we serve? How many got jobs? Now we’re focusing on other metrics as well, like what types of services did participants receive? What was the quality of that job? We’re working as a team coming up with hunches about what’s affecting results.”
-La Tasha Shevlin, Adult Employment and Training Director, East Side Neighborhood Services



⁵See Appendix of this report for the full assessment tool, which asked for ratings from 1.0 to 5.0 (highest) on 17 statements.

⁶When organizations invite teams to take the survey, the individual results are confidential, returning an organization or department-wide average for each statement. CSW did not require that the same individuals took the survey each time, and the total number of respondents from each organization also varied.

Similarly, organizations indicated that *staff were more intentional about their efforts*; they used their data to drive process alterations like the timing of reminder phone calls to participants to reduce program dropout rates. Lastly, managers and staff said they *worked better as a team*. They better understood each other's roles in program delivery, as they collaborated on digging into data behind a hunch and implementing change ideas for change.

Improved Funder/Provider Trust and Alignment for Impact

Creating a collective experience among providers and funders, with shared language and aims, proved to be just as central to strengthening overall workforce development capacity in the Twin Cities as improving individual organizational performance. Providers and funders alike used Benchmarking's shared language and common experience to connect professionally with each other as learning partners. Funders adopted continuous improvement into their own thinking and funding approaches. Providers clearly saw the investment funders made in Benchmarking as an investment in them.

"The level of trust has gone up. Community providers are so excited to tell me what they are up to. We are at the table with them saying there's no one right way to do this, but how are you approaching your work? What's important to you in your program, not that you have to measure this one item."

- Rachel Speck, Program Manager, Increased Earnings, Greater Twin Cities United Way



Funders state that their investment in Benchmarking has resulted in the field's capacity to 1) be more articulate about the impact of their workforce development services, 2) see and formulate responses to system-wide challenges and 3) be more nimble in responding to workforce development stakeholders such as employers, officials, and community partners.

Funders report that organizations are better able to convey why certain program processes are worth continuing or altering, based on their improved ability to learn from their data. They can more clearly link process steps to outcomes and the impact of their services. Second, organizations and funders improved their collective understanding of the landscape in which they were working. Through the peer experience, organizations and funders discovered and confirmed challenges common across the system, such as the limited usefulness of reports from the state's workforce data system (Workforce One) for program management.

Third, funders believe providers are better positioned now than they were before the Benchmarking process to more effectively respond to and anticipate wider changes in the economic and workforce development landscape. Organizations who are equipped to learn more rapidly what works and what doesn't are better able to describe the value of their program model, to crisply articulate their program outcomes and what that means for the community. Most important, they are able to engage with employers (public and private) more effectively by using language that has been common in the private sector for a long time. Workforce providers who can demonstrate that their organizations are able to innovate and improve over time will have an advantage in securing funding, deepening employer engagement, and generating community goodwill.

Twin Cities Benchmarking: Lessons


On-the-ground Benchmarking: Better communication yields better results at JFS Employment Services

Jewish Family Service of St. Paul serves a broad community of residents, including immigrants and refugees, seniors, persons with disabilities, and families in need of counseling and employment. Its small team working on Employment Services engaged in the Benchmarking process seeking to improve job placements results. Technical assistance site visits with WBN staff brought all team members into the same room—an infrequent occurrence given schedules and responsibilities of staff members, some of whom were part-time. Together, team members looked at data associated with program participants who were successful and who were not—and engaged in dialogue about the underlying issues, using a Fishbone diagram (a common quality improvement tool) to better understand cause and effect. Their hunch? Success was all about communication. The team could achieve better results through more “touches” with clients, by holding regular team meetings to discuss specific client needs and employer options, and by generating up-to-date accessible data to track progress. With a commitment to these strategies, JFS Employment Services went from placing 50 clients in 2015 to 94 in 2016—an 88% increase. “Staff have much greater ownership of our data and our strategies,” says Employment Services Manager Iweda Riddley.

For Workforce Development Organizations and Leaders

Several key lessons emerged from reflection with the Twin Cities Benchmarking Initiative organizations and observations of Workforce Benchmarking Network staff. Though these themes are not new ideas, their importance is reinforced by the Benchmarking experience at a time when high performance is more critical than ever. While these are useful insights at the program or organizational level, they could apply equally well to collaborative initiatives at the workforce system level.

1. Senior leaders must champion the shift to using data for learning, not just accountability.

 Leaders set the tone for risking experimentation and for making data reflection time a priority. Staff will see data primarily as a tool for funder accountability unless leadership consistently signals its importance for learning and improvement—and provides the time and resources to do so.

At [Goodwill-Easter Seals Minnesota](#), the senior management team understood that what gets attention from leadership becomes a priority. Says Workforce Development Training Director Becky Brink Ray, “As much as the managers and teams are excited, I know that if we don’t ask for progress every month and help move it forward it could easily lose its weight of importance.” The Chief Services Officer, Programs Officer, and director-level staff in the training and placement departments create regular time in staff meetings to revisit data on their target measures and discuss learnings. Staff comments reflect this change: “Talking about numbers, goals, and expectations as a team is now a natural process in the group. If my numbers are down it’s not ‘am I going to get in trouble?’ but ‘what do you want to do to figure it out? What’s your hunch?’” Senior leadership is also working to implement the Benchmarking tools in other Goodwill divisions and is using broad staff feedback from the data culture self-assessment to set priorities for further work.

Senior leadership at **Twin Cities RISE** used the Benchmarking improvement process to reinforce the value of examining and changing the organization’s core program model during 2015-2016. Managers shifted from sharing basic reports about program service usage to encouraging staff to use data to drive the program redesign. Says Director of Strategic Impact Leslie Dwight, “We’re not afraid now to have courageous conversations around our program model in terms of what may *not* be working. The focus on developing a continuous improvement culture has given staff more permission to try new things. Even if the results aren’t perfect, we’re not talking about them as a ‘failure.’” Dwight is also working with the Senior Program Director and the Planning and Evaluation Manager to redesign their dashboard of key data points, based on input and feedback from program staff.

The Benchmarking experience of **Jewish Family and Children’s Service of Minneapolis** exemplifies leadership’s role in focusing on “what are we learning?” Their Benchmarking outcome goal of increasing their job placement rate was not achieved during the project time frame—even though they had accomplished their focus measure goal of developing relationships at multiple levels within a certain number of employers. Rather than let her team see this as failure, Career and Community Services Director Margie Earhart framed it as a useful lesson that they might need to try additional strategies before they would see changes in results. She’s formalized the Benchmarking approach by establishing an internal Data Improvement Project across JFCS’s Career Services division. The group meets regularly to establish a clear dashboard of success measures, make better use of customer feedback, and increase staff competency with data.


In a few organizations, managers were actively involved in creating data culture change within their own sphere of influence—but reflected that it would be hard to expand that change more broadly to other departments because they perceived limited interest from senior leaders in doing so.

“Some leaders may say they are ‘too busy’ to be involved in this data work with staff—but I would argue back that this work is so integral to any successful organization.”

—Claudia Wasserman, Employment Program Manager,
CommonBond Communities



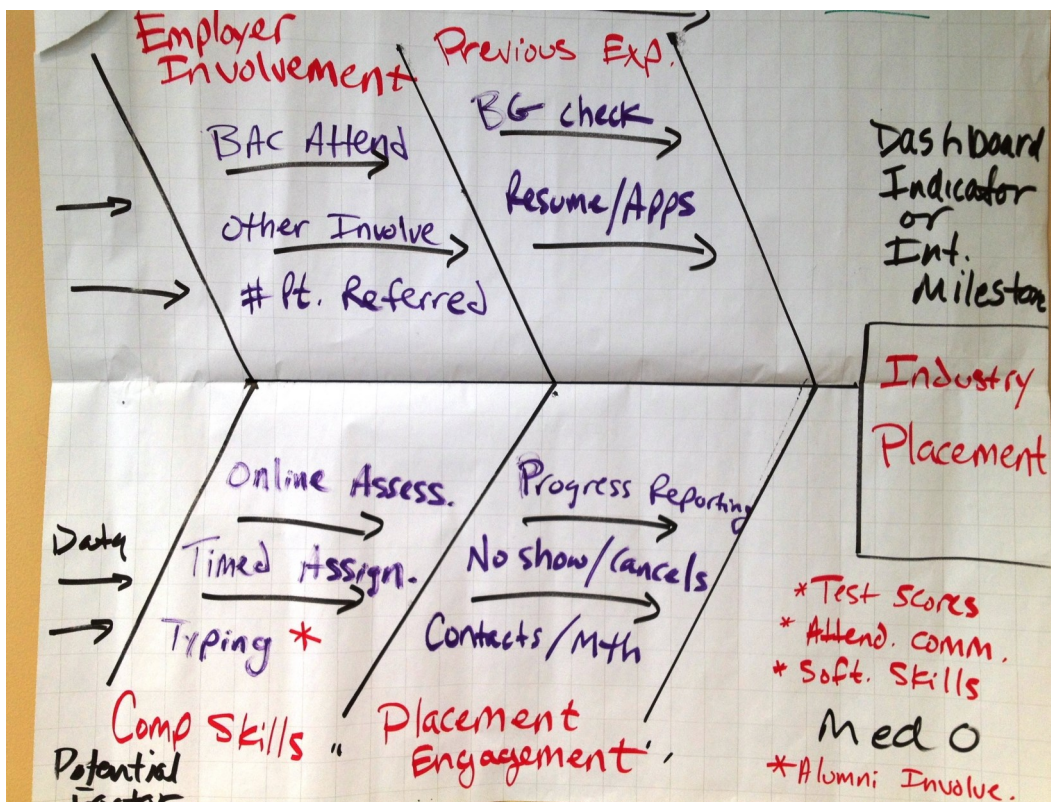
2. Time for reflection on data and its implications must be embedded into program operations.

 Making the time to reflect on and mine their data was a challenge cited by several of the Benchmarking organizations. Demands on staff and management time are already high, so it’s important that data-focused improvement work become essential, not optional.

East Side Neighborhood Services’ Adult Employment and Training Director La Tasha Shevlin decided that their Benchmarking work on improving program recruitment was important enough that she would add on an extra hour to their regular staff meetings. This gave them time to discuss data and follow-up assignments taken on by smaller work groups between meetings. For example, for one meeting staff pulled together a map showing the zip codes surrounding ESNS and the number of persons attending information sessions from each zip code. This triggered a brainstorm of hunches

about factors that could be influencing these numbers, as well as action ideas about potential referral partners who could be visited in each zip code.

“At PPL, we realized that sometimes we were going through the motions of data entry but not really engaging with the data,” says May Xiong, Vice President of Employment Readiness. “By embedding data in the day to day we are able to work smarter with less. We’re now including data in staff meetings at all levels, including a discussion of *why* we focus on the data we do. It’s even inspired a bit of friendly competition between teams to improve their results.” A data support specialist does monthly spot checks of PPL’s data and works closely with staff to help them resolve data issues much earlier. On the leadership side, more managers are now included in senior staff meetings to discuss the story behind their data.



An organization’s “fishbone” diagram, capturing hunches and data they want to explore.

3. Data need to be visible, accessible and useful for *all* staff, not just managers. Data reports also need to help frontline staff see the impact of their work and how it's connected to the work of others and the overall mission.

Emerge learned through its data culture self-assessment process that many staff found data reports hard to understand and of limited use. So its Benchmarking team, particularly Evaluation and Reporting Coordinator Cassandra Berg, created a regular “Data Highlights Brief” for managers that gave them information in a more streamlined format they could use in coaching staff to meet program goals. They also created a monthly “Data Jam” e-newsletter, a fun and interesting communication that shared data on key accomplishments of EmERGE teams and engaged staff to respond with suggestions on challenges. According to Director of Employment Services Amy Knaus, “Quarterly reports used to be a burden, a reminder of all the things I did wrong or need to fix. Now staff are asking ‘has Cassandra finished it yet? – I want to see it!’ They see data reports as a tool that they can refine to meet their needs and actually use to make decisions. You can feel the change.”

At **CLUES**, Financial Opportunities Center staff sought to increase the number of participants who received the complete bundle of financial, income supports, and employment coaching services. Amanda Pleskovitch, Manager of Client Coordinated Care, created a simple spreadsheet accessible to staff across different departments to help them track services and cross-referrals by participant. It actually gave staff a way to see their work and how it connected to others’. After using the spreadsheet report and the Benchmarking fishbone tool to look at factors influencing the volume of cross-referrals and participants’ service usage levels, the percent of participants with more than one service increased after just one quarter. This was an “aha” moment for staff that led them to a “what can we do next?” joint focus on additional improvement goals and change ideas.


4. Identifying “result leaks” in work processes and disaggregating data focuses improvement efforts. This key element of the continuous improvement approach helped make data more meaningful and useful for staff and managers.

While **Summit Academy OIC** already collected a lot of participant data, its Benchmarking work concentrated on using that data to increase program enrollment rates. Staff knew that they were losing a lot of applicants between orientation and the first day of class. By further disaggregating their data, they identified that the biggest leak in their program flow occurred when people were scheduled for math and reading level testing, a step which came after orientation but before enrollment. By focusing the team on driving improvement in this one focus measure, they generated a more streamlined process and increased enrollments. They also captured more useful data from initial applicant interviews on specific participant needs and motivators.

The employment and financial coaching staff at **CommonBond Communities** knew that because they are a small team they needed to be more strategic about how they targeted relationship building for potential employers of the diverse resident population at their housing sites. It wasn't enough to know which businesses had hired the most residents. Using data and graphs that showed historical retention rates, hiring wages, types of positions, and work hours—as well as data on the current skills and interests of the residents—they identified the employers they most wanted to focus on for continued outreach and new relationships.

While there may be many leaks or gaps to address, **Lifetrack's** Vice President of Employment and Economic Opportunity, Diane Heldt, emphasized the importance of choosing one improvement goal at a time. "Our goal—reducing time to placement for participants—was on our managers meeting agenda every time we met. Having one goal gave us the time to understand the data for various sub-groups and come up with better ways to address influencing factors."

5. Engaging staff across functions and levels yields better “hunches” and sets the table for better

 **results.** Multiple funding streams and programs can cause organizations to become more siloed in their communication. Organizations that involved both management and frontline staff across several functions could see larger system issues and learn from each other's experience.

RESOURCE applied the Benchmarking improvement approach across three different programs, with a shared emphasis on reducing participant attrition between initial enrollment and the first day of services. As some other Benchmarking organizations did, staff across the programs gathered data to understand their “recruitment funnel,” data showing how numbers of engaged applicants decreased at each step of the intake/enrollment process. For 18 months they met together as three programs with a common goal—learning from each other's experiences, brainstorming hunches using the fishbone tool, and implementing change ideas. They reported regularly on their progress jointly to senior leadership. Louann Lanning, RESOURCE's Division Director of Specialized Career Services for Women, says that “the consistent opportunities for cross-program dialogue helped us create a strong foundation: a culture that is more comfortable with ambiguity and willing to try new things.”

“The concept of testing hunches makes data less scary for staff and acknowledges that they are the experts.”

-Diane Heldt, Vice President of Employment and Economic Opportunity, Lifetrack



Staff at **AccessAbility** used the Benchmarking principles in a newly-funded U.S. DOL grant program focused on the re-entry population. The new staff team, deep in the weekly demands of program start-up, used the tools to step back and analyze monthly and quarterly trends. They discovered that what seemed like a high rate of attrition between information sessions and program enrollment was actually a short-term anomaly, not a long-term trend. The team employed weekly meetings to compare data from different angles and attain a common agreement on program leaks and hunches about them. Says Jacki Gale, Program Manager, “Benchmarking tools have helped the team, who have different roles working with clients, apply those perspectives together to effectively manage program implementation and meet our grant outcomes. Success with this grant will help us increase our services and spotlight how this approach could be used in other divisions.”

6. Adopting a learning culture matters—and requires sustained attention. Culture change around data—like all culture change—is challenging work. New databases, staff turnover in key positions, and organizational restructuring made it hard for several organizations to move forward with their Benchmarking improvement goals as quickly as they would like. Those leading the work needed to stay focused on the big goal but start small, be patient, and celebrate progress frequently.

CAPi's leadership saw the Benchmarking activities as a way to build staff's understanding of CAPi as "one system" of many interrelated services for new immigrants. With a long-term goal of increasing job placement rates, CAPi's team focused first on increasing referrals between its various divisions. After almost three years of Phase One and Phase Two Benchmarking activities, cross-referrals have increased and programs are working together more. Before this progress, other related strategies were needed first, e.g., increasing staff's understanding of each other's services, agreeing on the benefits of improved cross referrals to various divisions, simplifying the intake and referral process, making sure that staff knew how to do referrals using CAPi's new database, redesigning some program flow, and incorporating stronger expectations around referrals and data use into job descriptions and performance evaluations.

Says Mary Niedermeyer, Employment Training Manager, "As someone who's passionate about making needed changes, I've really learned that I need to be more patient. I've had to step back to first get more buy-in from other staff, and to understand the different ways that people learn. This takes time and perseverance." And even with improved cross-referrals, placement rates have not yet improved as much as hoped. But the Benchmarking reflection process and data analysis have revealed additional influencing factors to address, ranging from transportation issues to staff coaching needs. Celebrating what *has* been accomplished becomes crucial to sustained progress.

Pillsbury United Communities was committed to embedding continuous improvement work with data into its ongoing operations. Before they could even identify their focus measure for improvement they needed to make sure the baseline data they had were accurate. So that became their important first step and the focal point of their progress celebration. "We're taking control of our own data and of making meaning from it. This means we've had to step back to ask if we are even getting what we need to know from our database," says Katie Kohn, Coordinator of Organizational Performance and Evaluation.




Photo Credit: Paladin12/Shutterstock.com

For Funders and Capacity-Builders

Feedback from organization staff and funders affirmed that the Benchmarking Initiative’s success was due in part to design considerations and to how the local funders related to the work. Based on that feedback and WBN’s work in other cities, these are important design elements:

1. Ensure organizations formally commit to the improvement process—and are able to drive its


 **focus.** Organization leaders signed letters of commitment for each phase, identifying the staff teams that would participate in events and further committing staff time to apply the tools internally. A strong expectation was communicated in Phase Two that organizations would use the Benchmarking tools to both achieve a specific performance goal and deepen staff’s engagement with data. But organizations were able to select their focus measure—as long as they could describe how it related to better long-term results for clients. Through self-assessments of their data culture at the beginning and end of the Initiative, they also identified specific strategies to strengthen and monitored progress. Although each organization worked at a different pace, action plans created at each on-site meeting and regular check-in calls with WBN staff provided useful accountability and kept teams focused.

“The Benchmarking Initiative has been so refreshing. Helping programs understand and implement the continuous improvement process has made a big difference for Twin Cities RISE, leading to improved results and helping us feel comfortable with testing out new ideas via a data-driven process. We appreciate the long-term investment in Benchmarking that gave staff the chance to learn from the consultants and from our peers.”

-Leslie Dwight, Director of Strategic Impact,
Twin Cities RISE



2. Provide adequate time and frequent opportunities for staff to learn and apply the approach.

 To accomplish positive results, the Benchmarking Initiative intentionally engaged leaders and staff at multiple levels over almost three years. From introductory workshops in late 2013, to peer forums around different program areas in 2014, and then focused improvement work in 2015-2016, staff had dedicated time to become comfortable with the Benchmarking tools and use them in ways that were immediately relevant to their work. With multiple staff engaged, organizational ownership and identity around “doing Benchmarking” began to develop. Staff and funders alike could talk about process milestones, hunches, influencing factors, and past experiences of completing fishbone tools with staff. This kind of shared language and common experience supported organizational culture change.

3. Design for peer learning and connection across organizations. The learning forums in both phases of the Initiative allowed line staff and managers to hear practical lessons from peers and the larger field. Cross-site interchange sometimes challenged participants' thinking as they realized how their similar challenges could be addressed through a variety of approaches and strategies. Though all providers in the group offered workforce development services, some also offered financial coaching, housing, and other services that sparked ideas for new strategies or potential collaboration. The learning event design also included significant action planning time for organization teams where they could discuss ideas gained from the peer exchange and decide how to best put them to use internally. Participants said that this "thinking time" together and the chance to connect with fellow practitioners were both extremely valuable.



Sharing progress and lessons learned at a Benchmarking peer forum.

4. Invest in direct technical assistance to internalize an improvement culture within organizations.

Funders' increased investment in more intensive technical assistance in Phase Two reinforced organizations' deeper adoption of the continuous improvement approach. Program teams thoroughly discussed the unique challenges and situations related to their improvement project's goal through site visits and check-in calls with WBN staff. More importantly, technical assistance further broadened staff's engagement with the Benchmarking improvement tools and their use in ongoing operations. WBN staff coached managers on how to use the tools in leading their colleagues through the process and also kept senior leadership engaged in the work. Over time, the technical assistance process in some organizations included several different staff teams, expanding internal capacity.

5. Be “learning partners” in this work with grantees. Staff from GTCUW, the Phillips Family Foundation, and LISC Twin Cities were essential to the success of the Initiative by reinforcing that they considered themselves partners in developing a shared culture of learning to improve results across the system. Funders demonstrated this in two essential ways:

- ◆ **Seeking to learn from and with grantees.** Through informal conversations and more formal grant proposal formats, Twin Cities funders asked grantees about their improvement focus areas and the data questions they were trying to answer. This dynamic reinforced that grantees/providers are the experts in their own processes and that funders were learning partners with them about what works, versus an expectation that pre-defined “best practice” models would be implemented in a static way. Funders also attended some of the workshops and forums to learn the tools and language of the Benchmarking approach. They listened to large group discussions for insights on where there were field-related issues or challenges they could assist with or areas for potential alignment.

Funders were also sensitive to when they should avoid being present to ensure a safe zone for conversation among providers. Funders intentionally refrained from attending some workshops, and were careful to support confidentiality about provider conversations with WBN staff early in the process. As trust in the process built up over time, the approach toward confidentiality shifted and organizations and funders found they could talk more openly about challenges. More direct dialogue reinforced mutual learning from each others’ perspectives.

- ◆ **Making sure that useful data comes back to grantees.** It is not unusual for grantees to feel like they submit reams of data over time to funders, with few reports coming back that are valuable for learning or improvement. For several years, Twin Cities funders have demonstrated sustained commitment to putting useful data back in the hands of providers. In 2013, GTCUW and the Phillips Foundation invested in providing Benchmarking data reports for 17 organizations. These confidential reports benchmarked organizations’ outcomes against similar organizations in the national Benchmarking dataset. For providers, gaining access to this kind of information about their own performance was welcomed precisely because it was for their use only (funders only saw aggregate city-level data).

Even before the Benchmarking work began, GTCUW had begun to provide “return on investment” reports back to its grantees, using the access it had to long-term retention information available in wage records through the state’s workforce agency (DEED). Based on GTCUW staff’s own learnings in the Benchmarking sessions, the reports were redesigned to facilitate continuous improvement conversations, with an eye toward agency ownership and flexibility for program staff to explore their program outcomes. A new “data dashboard” online platform now has graphs that each organization can generate to show placement, retention, and earnings trends—trends that can be disaggregated across numerous population and service factors. GTCUW specifically designed the tool for providers’ use and has made it clear that the outcomes will not be used for funding decisions.

Next Steps: Expanding and Sustaining this Work

In July 2016, the Twin Cities provider improvement teams met for a final Peer Forum to celebrate their success to date, reflect on lessons learned, and identify priorities for expanding the work—based on their reassessment of their internal data cultures. By far the most consistent priority identified was *improving the collection and use of customer feedback* from both program participants and employers. This is an ongoing need in the larger workforce field, and is consistent with the current focus in the social sector on human-centered design and integrating “constituent voice.” Supporting this in a more intentional and actionable way needs to be part of future Twin Cities capacity building efforts.

Other priorities identified by several organizations included *engaging additional departments or programs in the improvement activities* (to continue the culture change work), and *better aligning data reporting across programs and divisions* (to support more cross-referrals and better evaluation).

“Through Benchmarking, I’ve seen that staff’s impact goes beyond what we do in face-to-face interaction with participants. We’re also making a difference by interacting with our data and using it to improve services. That’s exciting and energizing for our team!”

-Vanessa East, Employment and Financial Coach,
CommonBond Communities



What is needed to sustain the use of a continuous improvement approach in workforce organizations?

As emphasized in this report, it starts with **leadership commitment** to high performance and better results for constituents, through a culture that prioritizes learning and the continuous use of data to drive improvement. But Twin Cities providers and funders also pointed to these needs, if the continuous improvement work is to thrive:

1. **Designated staff** who can focus not only on making sure that data is accessible and understandable, but who can also help drive the learning process around it through intentional conversation and coaching with program teams;
2. **Ongoing staff training** in continuous improvement methods and the use of data systems—perhaps even as part of staff onboarding processes—to insulate improvement progress from at least some of the effects of staff and leadership turnover;
3. **Multi-year funding for capacity building**, since developing and deepening organizations’ continuous improvement skills is a long-haul process; and

4. **Better access to data at the system level**, including technical assistance to understand long-term performance trends and to support shared learning across system providers.

In an era of rapidly shrinking resources, those organizations that are focused on becoming high performing organizations through better data use will definitely have a competitive edge. They will better meet the needs of both employers and job seeking customers. But even *more* important is what can be accomplished by those organizations working collaboratively as a system.

The capacity-building tools and approach of the Workforce Benchmarking Network have now been integrated into the activities of *Equity Works*, a workforce development initiative facilitated by the Future Services Institute of the Public and Nonprofit Leadership Center at the University of Minnesota’s Humphrey School of Public Affairs. In this community of practice, provider staff and leadership will further hone their continuous improvement “muscle” through a focus on addressing the uneven employment outcomes for communities of color and American Indians.

Learning collaboratively from data in new and creative ways will be an essential part of this very critical work for the Twin Cities community. With improved trust between providers and funder partners, the workforce development field can more effectively speak with one voice to address this economic disparity issue and others like income mobility and job quality.



Rachel Speck, Senior Program Manager, Increased Earnings of Greater Twin Cities United Way at a Benchmarking-related meeting with Kelly Matter, CEO of RESOURCE, Inc.

Appendix: WBN Data Culture Self-Assessment

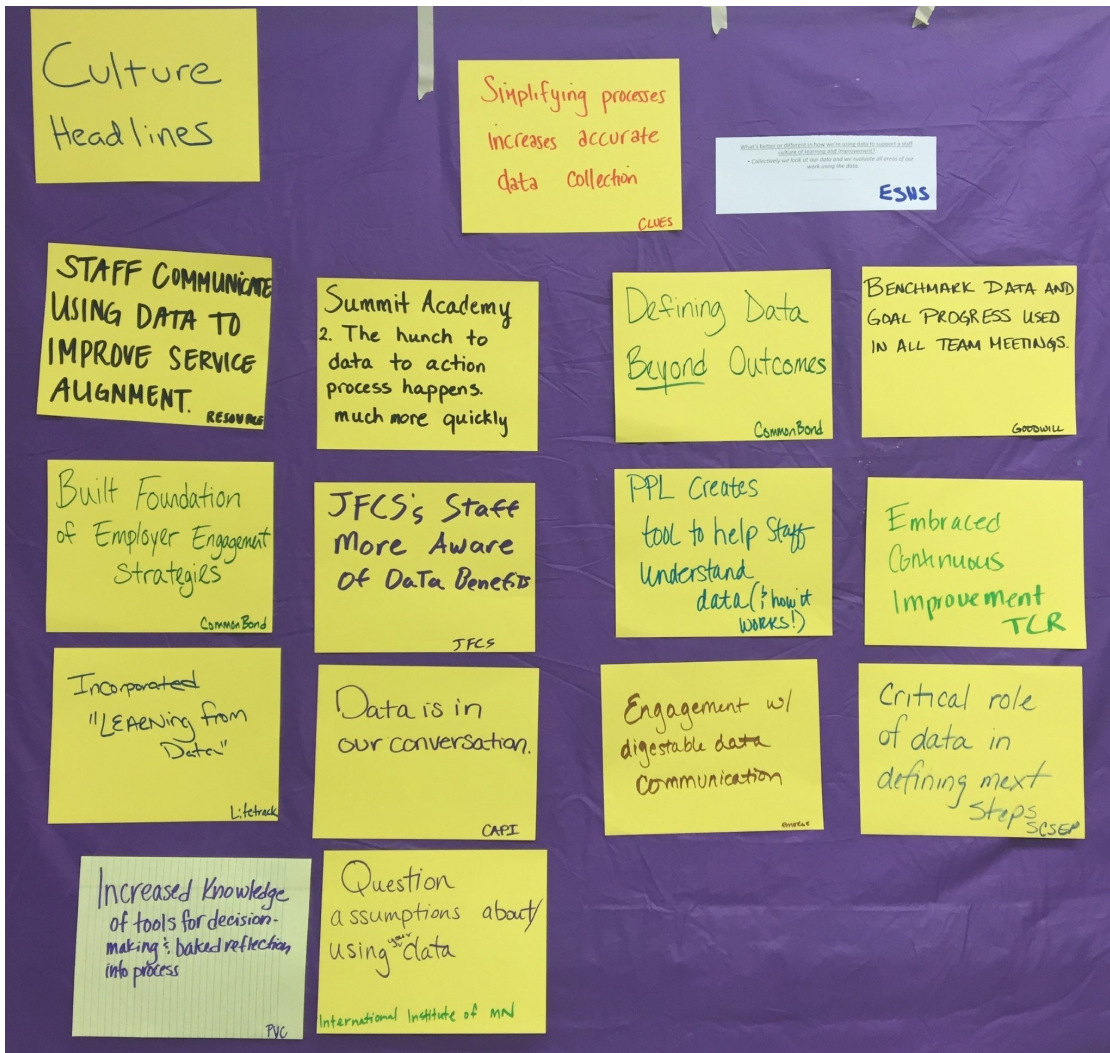
Workforce Benchmarking Network 2017

Strengthening Our Culture of Using Data for Learning and Improvement

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

| STRATEGIES | ORG/ PROGRAM RATING (1-5) <i>5 = Strong</i> | COMMENTS/ EXAMPLES |
|---|--|-----------------------|
| FOCUS ON THE DATA THAT MATTERS TO <u>YOU</u> (your mission, goals and processes) | | |
| 1. Active Involvement of Leadership with Data: Senior leaders communicate and model the expectation of using data as a resource for learning and improvement at all levels of the organization – not just for accountability. | | |
| 2. Clear Vision and Visible Success Measures: Leadership works with managers and staff to create core “dashboard indicators” that reflect mission success (how much, by when). These measures are kept visible and there is transparency about progress on them (or lack thereof). | | |
| 3. Aligned Progress Milestones: Managers work with individuals and functional teams to identify useful interim progress measures that contribute to org / program target goals and can drive real-time improvement efforts. | | |
| 4. Meaningful Data Comparisons: Reports on outcome measures compare results to target goals, past results and peer organizations (where possible) | | |
| 5. Strong Customer Feedback Processes: There are regular, systematic opportunities for participant and employer customers to provide feedback on their experience and results, and that feedback is shared with staff and board. | | |
| ENGAGE STAFF’S “INQUISITIVE MIND” ABOUT RESULTS | | |
| 6. Frequent, Regular Dialogue on Data: Staff review and discuss quantitative and qualitative data as an ongoing part of organization, team and supervisory meetings. | | |

| | | |
|---|--|--|
| 7. Engagement in Testing Hunches: Staff are engaged to identify issues, test hunches and gather data about potential factors influencing performance, and leadership supports teams of managers and line staff to address priority challenges. | | |
| 8. Customer Involvement in Generating Improvement Ideas: Participants, referral sources, employers and other partners are engaged in discussing factors that influence outcomes and ideas for improvement. | | |
| 9. Struggle and Failure Seen as Opportunity: Staff are encouraged to share struggles and failures as opportunities to learn and improve how processes work, rather than blaming individuals or avoiding the situation. | | |
| 10. Improvement Celebrated: Senior leaders and managers regularly recognize individuals or teams for their improvement efforts and progress in using data – through emails, newsletters and storytelling in meetings. | | |
| HELP STAFF EXPERIENCE THE BENEFITS OF DATA FOR THEIR WORK | | |
| 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 and help them work more productively. | | |
| 13. Training, Training, and more Training: Organization provides ongoing training--both formal and informal—so that staff feel confident with data and are able to demonstrate competency in its use. Managers receive the training they need to use data as part of their staff coaching. | | |
| CREATE 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 system is in place to ensure data completeness and accuracy, including staff data monitoring strategies as well as integrated software features. | | |
| INVEST TIME CONTINUALLY TO LEARN AND IMPROVE | | |
| 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 staff allocate the time and resources needed to support ongoing reflection and continuous improvement work. | | |



“Headlines” reported by Benchmarking organizations about the difference their work is making.

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