Retention Ready TouchPoint and Process

Battle Creek Community-Wide Non-Profit Database

Prepared and managed by Goodwill Industries of Central Michigan's Heartland

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Introduction

As a Workforce Development consortium, *Connect Battle Creek's* primary purpose and mission is to empower people to change and improve their lives by equipping them to find work, if unemployed, or to secure better jobs if underemployed. This mission naturally leads to employment numbers becoming a metric of performance for our various programs. The Partner Agencies strive for honest statistics without jeopardizing outcomes with a false dataset.

To get an accurate employment rate, the result must be a percentage of Participants that secure jobs divided by those who are ready and able to work. We've settled on the term "Retention Ready" to denote those who have been successfully equipped to not only acquire employment, but to *retain* employment for a significant period of time. The Participants are considered "ready to retain" employment, from which the terminology is derived.

Each Partner Agency has their own criteria for determining Retention Ready, and custom paper forms have been developed for each Agency to track for individual Participants, if desired. This status is also tracked in ETO through a TouchPoint named "Retention Ready" and a dashboard part on the Participant's dashboard that displays all the TouchPoint's data in real time. This chapter describes this TouchPoint, the view table in the dashboard part, and the process used to determine retention ready for evaluation purposes.

Retention Ready TouchPoint

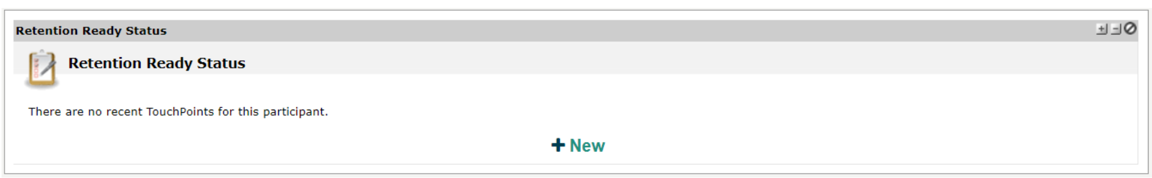
Introduction

The "Retention Ready" TouchPoint is a short and simple form with only a few fields. It's set to allow one TouchPoint to be recorded per Participant, per ETO program, per enrollment, and can be modified without restriction to keep it up to date with the Participant's progress. As they progress through the checklist criteria, users will not add a new TouchPoint, but will go into the existing TouchPoint and update it as applicable. The criteria for each Agency will be explained later in this chapter.

Record New TouchPoint

To record a new TouchPoint, select "Retention Ready" from the TouchPoint list presented to you. The Date Taken field at the top of the TouchPoint will default to the current date, which is acceptable to use for this TouchPoint. Two other dates appear on the TouchPoint form.

The best way to view and record this TouchPoint is through the dashboard part on the Participant's dashboard. For most programs, the **Retention Ready Status** dashboard part will be the very first section below the dashboard menu and report links. Any TouchPoints that have already been recorded will appear in the view table. If none has yet been recorded in the current Program, a **+New** link will appear at center-bottom of the section.



Details

The TouchPoint will automatically show the name of the ETO Program you are logged into as you record the TouchPoint. This will trigger some conditional programming to filter the list of choices in the checklist toward the bottom of the TouchPoint.

"Retention Ready" is used to track the job readiness status of the Participants, and the key data field on the form is that status—and will appear on the view table—which will start out as "In Progress". Once the Participant is deemed Retention Ready, the field should be updated to "Yes", and if they then regress and the status needs to be lowered, it should be changed to "No".

There is a date to note when the assessment process begins and another date to show when the Participant was deemed Retention Ready.

Next is a checklist showing only the options for the ETO Program the TouchPoint is being recorded in, and matches the paper form tailored to that Agency program.

Last is an optional comment field capable of recording up to 8000 characters, should the case manager need to record any notes.

Completion

At this point, the TouchPoint is complete, and you can click “Save” at the bottom of the form to submit the TouchPoint and save it into the database. It will then appear in the Dashboard part, showing the Retention Ready status and the final date of determination when the status is “Yes”.

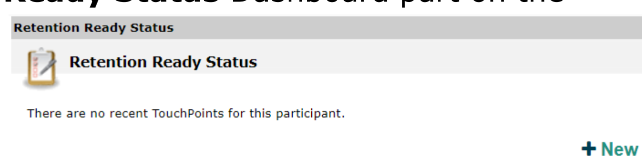
Step-By-Step Instructions

The following instructions will describe each field in the TouchPoint including: Type of field with data requirements (text in green), purpose of the field, conditional effects, and whether it is a required field or optional (required fields are labeled as such in red text). Most of the fields in this TouchPoint are required. Fields that are said to be 'optional' should not be taken to mean they are not necessary or do not need to be filled out. *For the sake of producing good reports, fill out all fields to the best of your ability; do not skip any because you don't think they are unimportant.*

Record New TouchPoint

1. You can only record or edit this TouchPoint from within any of the Agency's ETO Programs, including *Financial* (not likely to use it, though), *Good Systems – BC Connect*, *Michigan Works! Southwest*, *Woman's Co-Op*, and *Work Hardening – Goodwill*. It can be viewed but not recorded from within *Community Pre-Enrollment*, *Interest Card*, or *Employment* (they should not be enrolled in *Employment* until they have been deemed Retention Ready). If you are not already in your Agency's ETO Program, switch to it first.

2. Using the process most familiar to you, access the Record TouchPoint function. However, the best way to access this TouchPoint for any purpose is from the **Retention Ready Status** Dashboard part on the *Participant's* dashboard. To record new, click the **+New** link at the bottom-center of the section. *Note: if this TouchPoint has already been recorded for the Participant in your program, the* ***+New*** *link will not appear, and the TouchPoint will not appear in any other list of options, as it's set to only allow one "Retention Ready" TouchPoint per Participant, per Program.*

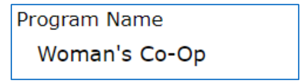


3. Complete the form as thoroughly as possible. Most of the questions are required and the details below will tell which are required and which are optional.

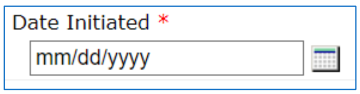
   Date Taken: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This date will default to the current date for this TouchPoint. This date

is not reported on, so leaving the default date in place is acceptable. *This is a required field*.

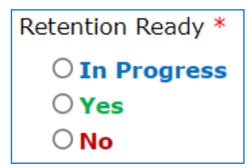
Program Name: This is a lookup field only, indicating the ETO Program the TouchPoint is being recorded in. This field will trigger the conditional programming set into the TouchPoint to activate and set up other controls.



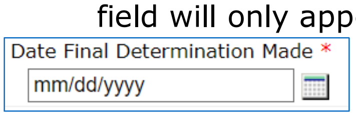
Date Initiated: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. Type the date the Participant began program services toward the goal of long-term employment. *Type the date directly into the control, or use the calendar control on the right to choose the date. This is a required field*.



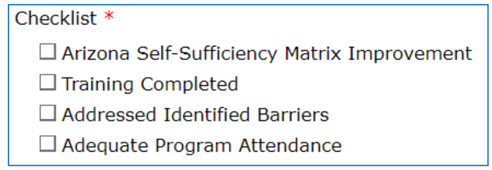
Retention Ready: This is an exclusive choice (can choose only one) option group with a pre-selected set of choices for the Participant's Retention Ready status, "In Progress", "Yes", and "No". Retention Ready Status is the key question and will display on the View Table. As the Participant begins their journey through your Agency's program, this is the time to initiate this process and TouchPoint, and you should initially select "In Progress" for the status. Once they've been deemed Retention Ready by your Agency staff, change the status to "Yes". If they at any point experience setbacks that make them no longer Retention Ready, select "No". If "Yes" is selected a new field, Date Final Determination Made, will appear. *Click to select the radio button next to the appropriate choice. This is a required field*.



Date Final Determination Made: This is a date field using the ETO standard date format (m/d/yyyy, no lead zeroes required), and will reject incorrectly formatted responses rather than resolve them. This field will only appear if "Yes" is selected for the previous question: Retention Ready. Enter the date the Participant was determined to be Retention Ready. If they have been set to "No" for Retention Ready at some point, and have regained their status to "Yes", change the date to the newly set Yes status. *Type the date directly into the control, or use the calendar control on the right to choose the date*. *This is a required field*.

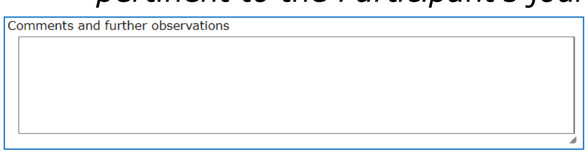


Checklist: This is a non-exclusive choice (can choose more than one) option group with a pre-selected list of options customized for each Agency Program; for **Goodwill**: "Addressed Identified Barriers", "Appropriate Behavior/Attitude", "Current Resume", "Presentation and Communication", and "Career Coach Recommendation"; for **KCC**: "Addressed Identified Barriers", "Completed iACT Program", "Strong Program Attendance", "Appropriate Behavior/Attitude", and "Career Coach Recommendation"; for **Michigan WORKS!**: "Training Completed", "Addressed Identified Barriers", "Current Resume", "PMTC Profile", "PMTC Understanding", "Maintained Same Job for 90 Days", "Completed Workshops", and "Career Coach Recommendation"; and for **Woman's Co-Op**: "Arizona Self-Sufficiency Matrix Improvement", "Training Completed", "Addressed Identified Barriers", and "Adequate Program Attendance". This field should be updated as the items on the checklist are achieved. *Select any and all items the Participant has successfully attained as they are achieved*. *This is a required field*.

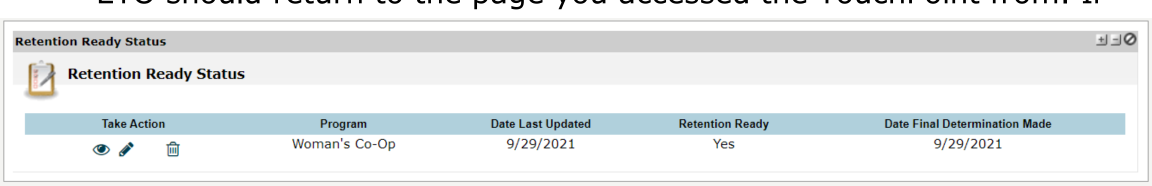


Once all of the boxes in the checklist have been checked off, ETO will automatically set—or change—the Retention Ready value to "Yes" and a message will appear stating the Participant is Retention Ready for that program.

Comments and further observations: This is a free-text field (8000 characters). *Type any observations or comments that may be pertinent to the Participant's journey toward long-term employment and attaining Retention Ready status.* This might include any of a long list of possibilities. Be specific and give a complete answer that others will understand, but not with too much detail. *This is an optional field*.



4. Click the "Save" button at the bottom of the form to submit the TouchPoint to the database and save the form in completed status. ETO should return to the page you accessed the TouchPoint from. If



accessed from the Participant's dashboard, the new TouchPoint you just recorded should appear in the **Retention Ready Status** dashboard part.

Dashboard Part and View Table

For most ETO programs, the **Retention Ready Status** dashboard part will appear as the top TouchPoint section on the Participant's dashboard (Woman's Co-Op uses the Case Management function of ETO and Case Management appears first on their Participant dashboards).

Retention Ready Status

Retention Ready Status

Take Action	Program	Date Last Updated	Retention Ready	Date Final Determination Made
	Woman's Co-Op	9/29/2021	Yes	9/29/2021

This dashboard part, or section, will show very basic information from and about the TouchPoint in a set of columns. The first column, "Take Action" has a set of icons that will vary depending on the type of TouchPoint and its unique settings. Notice that for this TouchPoint the **+** icon (as well as the **+New** link) is missing from the group because one TouchPoint already exists in this program and ETO will allow only one TouchPoint to be recorded per program. From another ETO Program where only this one TouchPoint has been recorded, the single TouchPoint would still appear in the view table and the **+** icon would be in its normal place.

Take Action

Program
Woman's Co-Op

The second column lists the ETO Program the TouchPoint was recorded (or last edited) in.

The next column displays the date the TouchPoint was last updated. The creation date is not of extreme importance so it is not displayed in this view table.

Date Last Updated
9/29/2021

Retention Ready
In Progress

The fourth, and most important, column is the Retention Ready status set by this Agency for the Participant. It will state simply "In Progress", "Yes", or "No".

Once the Participant has been determined to be Retention Ready, the date that determination was made will appear in the last column. This field only appears on the TouchPoint when the Retention Ready status is "Yes", so this column will be blank when "In Progress", though an invalid date *may* appear if the status is "No".

Date Final Determination Made

Retention Ready Process

Program Managers, Case Workers, and Career Coaches will track the progress of each Participant through their Program's efforts to equip them to secure and retain long-term employment using the "Retention Ready" TouchPoint and, if desired, the matching paper form. *No Participant should never be enrolled in the Employment ETO Program until they are determined to be Retention Ready by at least one Agency Program.*

> ***Important:** Do **not** enroll any Participant into the Employment program until they have been determined to be Retention Ready by your Agency's program. No one should ever be enrolled in Employment unless they are deemed Retention Ready by at least one program.*

Because the checklist is a required field, it is best to start the TouchPoint when the first item on the checklist is completed.

As the milestones are achieved, the TouchPoint should be updated to show the Participant's progress toward becoming Retention Ready. The primary consideration for any program is based on the Career Coach's recommendation. If the Career Coach believes the Participant to be Retention Ready, even before all the checklist boxes are checked off, then they can—and should—set the Retention Ready value to "Yes", and set the date this determination was made. In these cases, especially, notes should be recorded in the Comments and further observations box at the bottom of the TouchPoint explaining their reasons for the determination.

Once the Participant has been determined to be Retention Ready, enroll them in the *Employment* ETO Program. The evaluation team will use the Participants enrolled in *Employment* as the denominator in calculating employment and retention rates.

Participants that are not ready for long-term employment, have decided they do not really want long-term employment, or simply are not serious about securing and retaining employment, should not be counted against Agency goals for employment and retention. For this reason, only those who are ready to, desire to, and are serious about securing long-term employment should be in the pool for consideration against Agency goals. As enrollment in *Employment* determines this pool, only those who are Retention Ready should be enrolled in that ETO Program.

Retention Ready Criteria

Arizona Self-Sufficiency Matrix Improvement Woman's Co-Op Woman's Co-Op uses the Arizona Self Sufficiency Matrix to measure progress of their Participants toward achieving their goals, and they periodically re-assess Participants with this matrix. Showing significant improvement in their score over a period of time is essential to Participants becoming Retention Ready.

Training Completed Michigan WORKS!, Woman's Co-Op These two Agencies have various specific training programs they expect Participants to complete before being determined as Retention Ready. This does not include iACT training or outside classes, but the specific benchmark training programs that are part of these Agency's programs.

Address Identified Barriers Goodwill, KCC, Michigan WORKS!, Woman's Co-Op Addressing barriers to employment is essential to equipping Participants for long-term employment, and all four of the current Partner Agencies have this on their checklist. These barriers are recorded and indicated in the "Needs Assessment" TouchPoint in ETO (see the chapter on this TouchPoint for more details on that TouchPoint and its Child form: "Barriers Resolved").

Adequate Program Attendance Woman's Co-Op Slightly less than Strong Attendance, but still a significant level of attendance required.

Completed iACT Program KCC The iACT program is a job preparation training program with certifications. Completion of the program is naturally an expected requirement for KCC.

Strong Program Attendance KCC Strong program attendance is a requirement just to complete the iACT program, so it is naturally an expected requirement for Retention Readiness.

Appropriate Behavior/Attitude Goodwill, KCC Though somewhat subjective, there is a level of acceptable behavior and attitude that are required for employment retention. This is assessed by the Career Coach and other Program Managers.

Current Resume Goodwill, Michigan WORKS! A current resume must be approved or drafted by a Career Coach and kept on file, and should be uploaded to ETO.

PMTC Profile Michigan WORKS! Associated with the State of Michigan's UIA system, it is expected and required that a Participant have developed a profile on the Pure Michigan Talent Connect (PMTC) system.

PMTC Understanding Michigan WORKS! Likewise, being associated with the State of Michigan's UIA system, it is expected and required that a Participant understand how to use the Pure Michigan Talent Connect (PMTC) system to conduct a job search.

Maintained Same Job for at Least 90 Days Michigan WORKS! Participant must have kept the same job for a minimum of 90 days. This does not begin after Retention Ready, but while program services are being conducted.

Completed Workshops Michigan WORKS! Participant must have completed all the assigned workshops provided by Michigan WORKS!

Presentation and Communication Goodwill Participant must be able to present themselves in an adequately professional manner to a prospective employer and be able to communicate with an employer and co-workers in a coherent manner. This is somewhat subjective and is assessed by the Goodwill Career Coach and other Goodwill Program Managers.

Career Coach Recommendation Goodwill, KCC, Michigan WORKS! The Career Coach has the final say in determining Retention Readiness within these programs. They can override the checklist when items appear to be missing, and likewise when everything appears complete yet they do not believe the Participant is ready. This is a completely subjective assessment made by the Career Coaches.