RFA Workforce Fellows

Data Storytelling for Procurement - Evidenced Based Workforce Spending

May 17, 2023

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Let's warm up that chat box...

....What is a recent win you have had in your work?

- The program will begin shortly

- Please turn on your video

- Please mute your microphone

- You are welcome to use the chat box for discussions or questions throughout the session!

- Please rename your screen to

  - "Name, Preferred Pronouns, State, City/County"

  - *Example:* ***Brooke Valle, She/Her, Avon Lake, Ohio***

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Welcome and Introductions

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Today's Presenters

Brooke Valle

Independent Consultant

Former Workforce CSO &

Workforce Fellow

Erica Mulberger

Executive Director

Central Pennsylvania Workforce
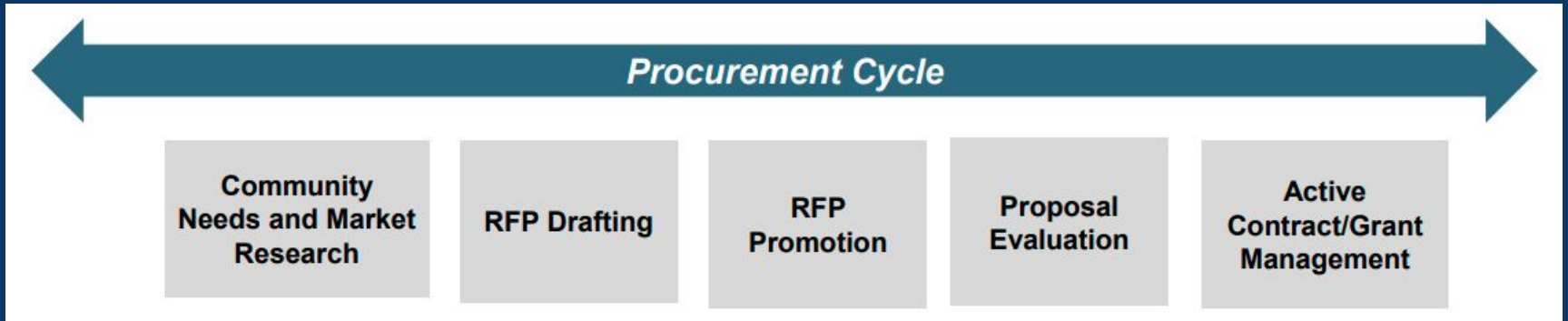
Development Corporation

Shannon Moran

Independent Consultant

Former Workforce COO and CIO

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By the end of this session participants will…

- ✅ Walk through a mental model for connecting goals to data at various points in the procurement cycle

- ✅ Explore how to engage stakeholders along the storytelling journey

- ✅ Consider the role that storytelling can play in communicating outcomes from the procurement process

- ✅ Hear from the Central PA Workforce Development Corporation about their evaluation work

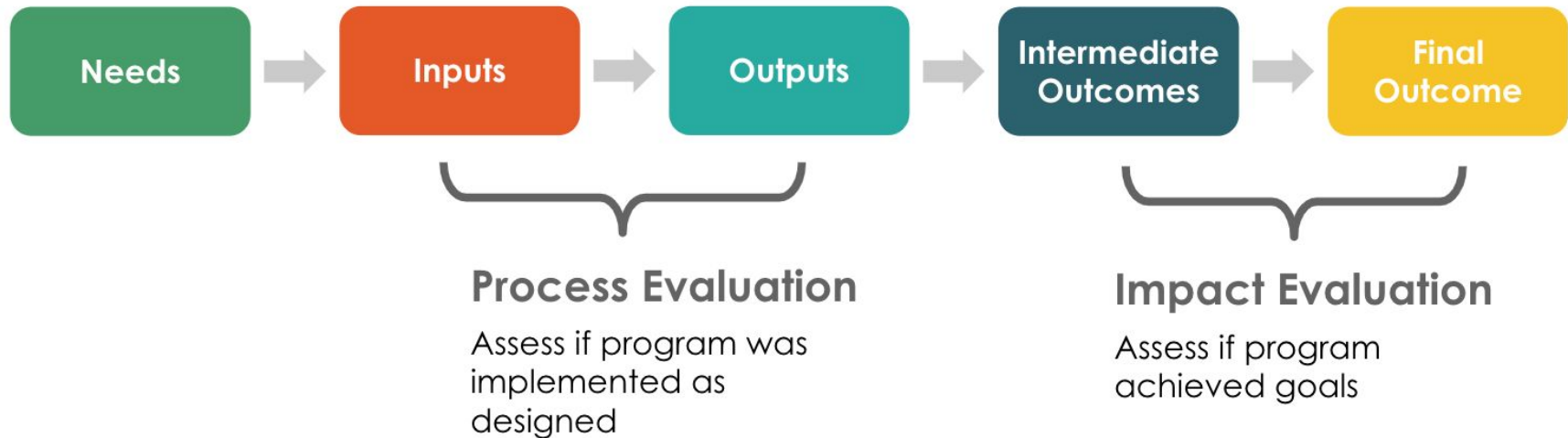- ✅ Identify an action step to take in their your own work

Procurement, Data and Storytelling

Where do we have an opportunity to collect data that could help tell a story?

Procurement Cycle

| Community Needs and Market Research | RFP Drafting | RFP Promotion | Proposal Evaluation | Active Contract/Grant Management |

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The Power of Storytelling

Storytelling can bring process and impact evaluation to life

Needs → Inputs → Outputs → Intermediate Outcomes → Final Outcome

Process Evaluation
Assess if program was implemented as designed

Impact Evaluation
Assess if program achieved goals

In the Chat: What are some ways you would like to use your data to tell stories about your work?

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Peer Sharing: Advance Central PA

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Advance Central PA Example

Getting Started:
- Requested funds from the PA Dept. of Labor & Industry
- Released RFP for Third Party Evaluator
- Kick off meeting with Research Evaluation Consulting (REC), small woman owned business in Colorado

Evaluation Process & Tools Developed by REC:
- Review of Advance Central PA policies, grant contracts, and existing data and evaluation tools
- Partner Staff and Key Stakeholder Interview Protocol (19/19 interviews; 100%)
- Business Partner Survey (184/2,772 responses; 6.6%)
- Job Seeker Survey (104/1,522 responses; 6.8%)
- WIOA Leadership Survey (19/39 responses; 48.7%)
- Secret Shopper Study (5/6 secret shoppers; 83.3%)
- Results presented in full Evaluation Report (76 p.) and Recommendations Report (17 p.)

Recommendations for Implementing an Evaluation Approach

1. Improve Collaboration between Staff, Partners, and Subcontractors
2. Share Successes and Lessons Learned Internally and Externally
3. Subcontractors Should Address Internal Workforce Development Issues
4. Create Staff-Friendly Tools to Streamline and Improve Service Delivery
5. Segment Job Seekers to Streamline Service Delivery
6. Review and Streamline Internal Processes and Procedures
7. Create a "Data Dictionary" for Job Seeker Data
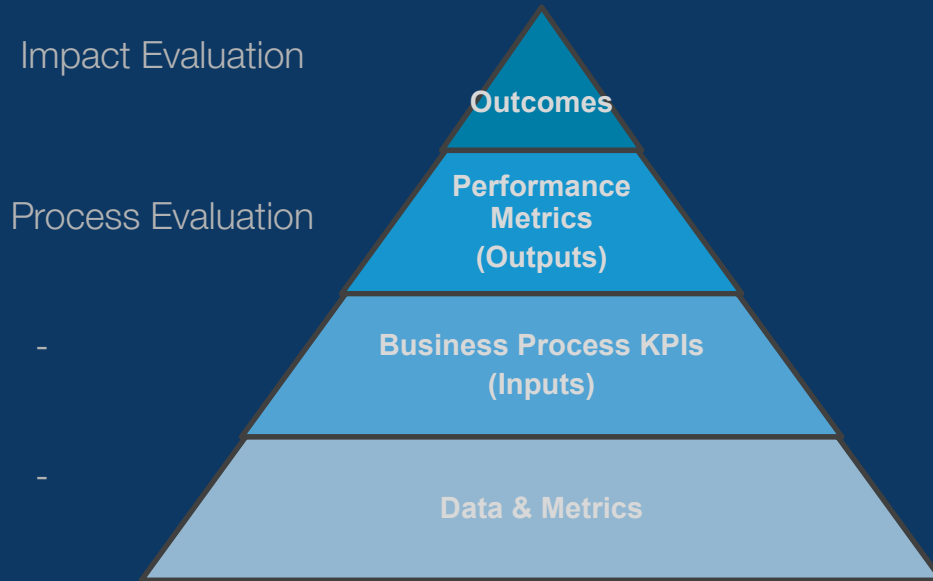
Recommendations for Implementing an Evaluation Approach

8. **Strategically Decide How Data Will be Used**
9. **Refine Data Processes to Focus on the Most Essential Data**
10. **Support PA CareerLink® Staff to Ensure Data Quality**
11. **Improve the Quality of Business Partner and Job Seeker Contact Information**
12. **Continue to Make Evaluation a Priority**
13. **Expand Training Opportunities to Assist Job Seekers**
14. **Strengthen Partnerships with Organizations that Provide Wraparound Supports**
15. **Engage Job Seekers and Businesses with Additional Communication and Marketing**

What to Collect and Who to Engage

Aligning the entire organization around outcomes

Impact Evaluation

Process Evaluation

-

-

Outcomes

Performance Metrics (Outputs)

Business Process KPIs (Inputs)

Data & Metrics

Example:

Agency:
Increase RFP responses from BIPOC agencies by 20% YoY

Procurement team:
BIPOC response target: Increase from 10% to 15% by end Q3

Procurement Ops:
RFP Diversity rate = Total number RFPs received with diversity category
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Total number RFPs sent

IT & Data teams:
Systems & data stewards measuring data completion and data quality

# Building blocks to a data driven organization

Scale across all business segments investing in Data Governance and Data Literacy
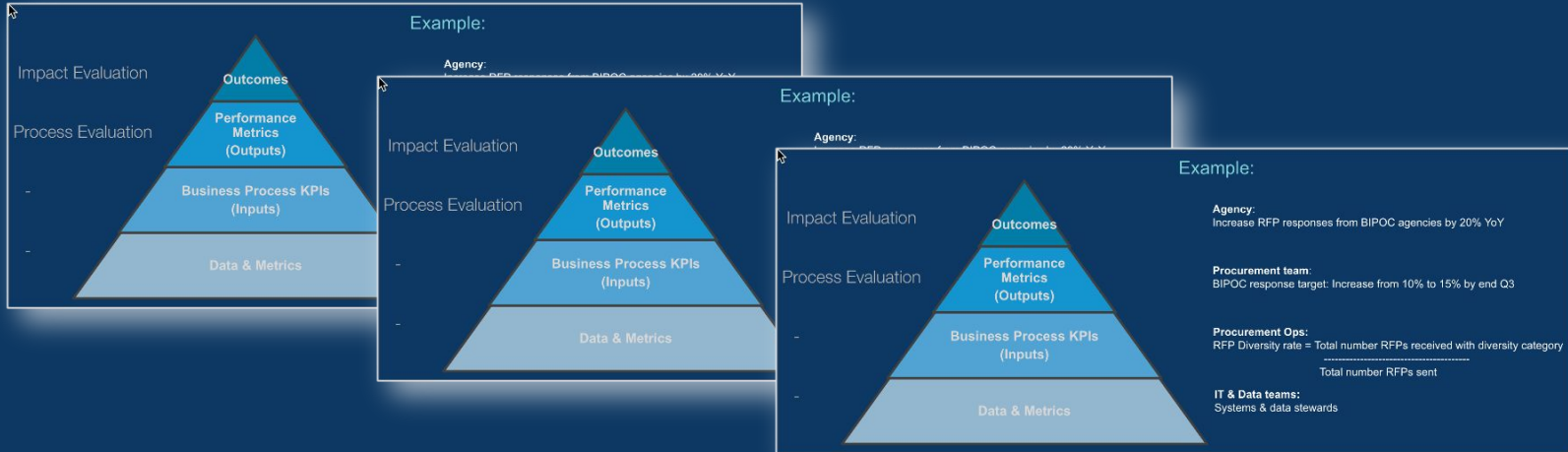
Building blocks to a data driven organization
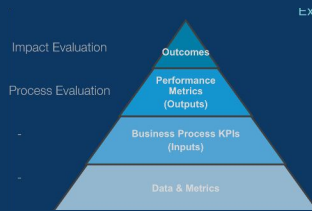
Scale across all business segments

1. **Strategically aligned outcomes**
2. **Prioritize outcomes**
3. **Data governance**
4. **Foster a culture of data literacy**
5. **Advocacy for data democratization & data equity**
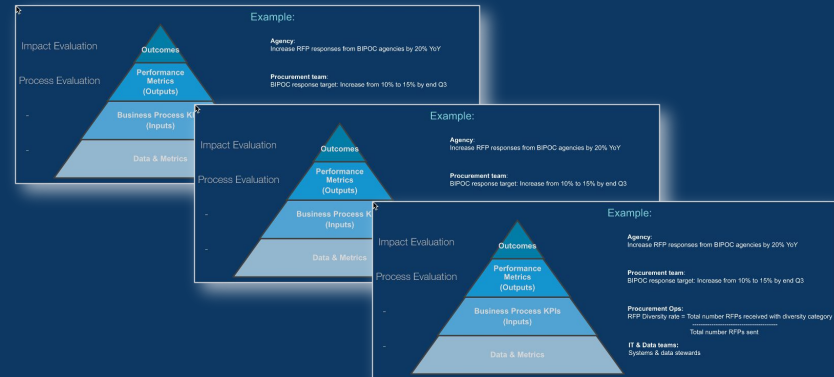
Procurement, Data and Storytelling

Where do we have an opportunity to collect data that could help tell a story?

Procurement Cycle

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EX

Impact Evaluation — Outcomes

Process Evaluation — Performance Metrics (Outputs)

- Business Process KPIs (Inputs)

- Data & Metrics

Process Evaluation

Impact Evaluation

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Gathering Data Throughout the Process

EPM Stage	Creating the Structure	Measuring the Work
Community Needs and Market Research	Create pre award town hall, Q+A or learning opportunities to gain insights from BIPOC serving organizations	Track participation and reach of outreach to unearth any gaps
RFP/NGA Strategy Design/Drafting	Establish technical assistance programs that are available pre award and during implementation for construction contractors	Track provision/use and themes from technical assistance, break down by type of organization (e.g. BIPOC lead, immigrant owned to surface any inequities)
RFP/NGA Promotion	Create plan to diversify locations/sources for funding notification	Track # of submissions by source and change in diversity of awardees over time
Proposal Evaluation	Engage diverse individuals in creating and carrying out a set of fair, unbiased evaluation approaches	Track who is selected to participate in evaluation committees and results by trend to surface any gaps or inequities
Negotiation	Establish and communicate continuous feedback loops	Assess use (#, timing, user) of feedback loops throughout process and adjust where needed - e.g. diversification of mediums, message carriers
Active Contract/Grant Management	Request contractor insights on the approach before initiating evaluation	Provide incentives (financial or process) for co-design of evaluation measures as those carrying out the work know the space best

Storytelling with data

Bring your data to life with a story

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Storytelling is…

Moving Beyond Informing To Influencing

- **who** effective messaging considers the audience
- **what** exploratory analysis identifies what is interesting
- **why** recommended change or decision call to action
- **when** Now. explanatory analysis & storytelling is the new black

Storytelling basics

1 focus **attention**
2 tell a **story**

Story focus

Focusing the audience on what you found to be interesting

STORYTELLING WITH DATA

Figure 4.1e Where are your eyes drawn?

Figure 4.1f Where are your eyes drawn?

Story focus

Practice the art of using preattentive attribute signals

How many "3"s?

75639506 8473
65866303 7576
86037265 8602
84658910 7830

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Story focus

Practice the art of using preattentive attribute signals

How many "3"s?

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Story focus

Focusing audience on what is interesting

Identify audience and measure/outcome

Annual Subrecipient diversity: **Results overall**

Minority-owned	40%
Unknown	35%
Women-owned	10%
LGBTQ-owned	10%
Veteran-owned	5%
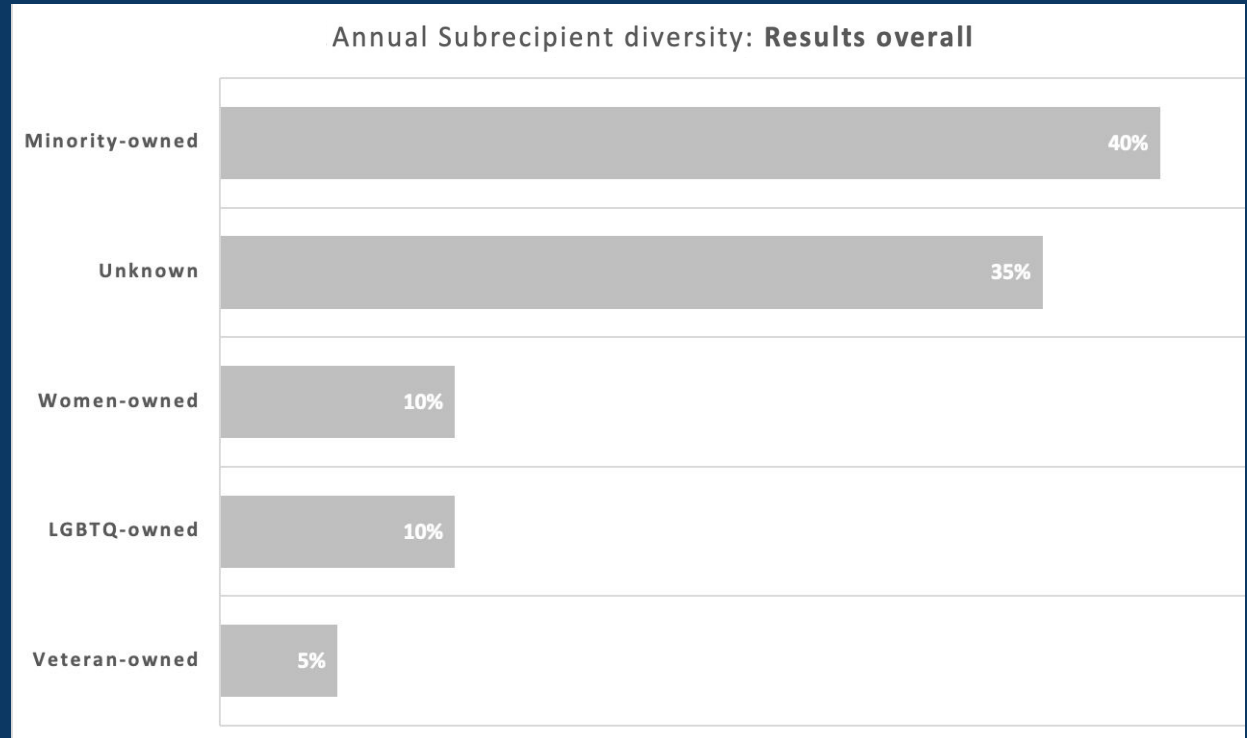
Story focus

Focusing audience on what is interesting

Focus on positive

Annual Subrecipient diversity: **Results overal**

Category	Percentage
Minority-owned	40%
Unknown	35%
Women-owned	10%
LGBTQ-owned	10%
Veteran-owned	5%
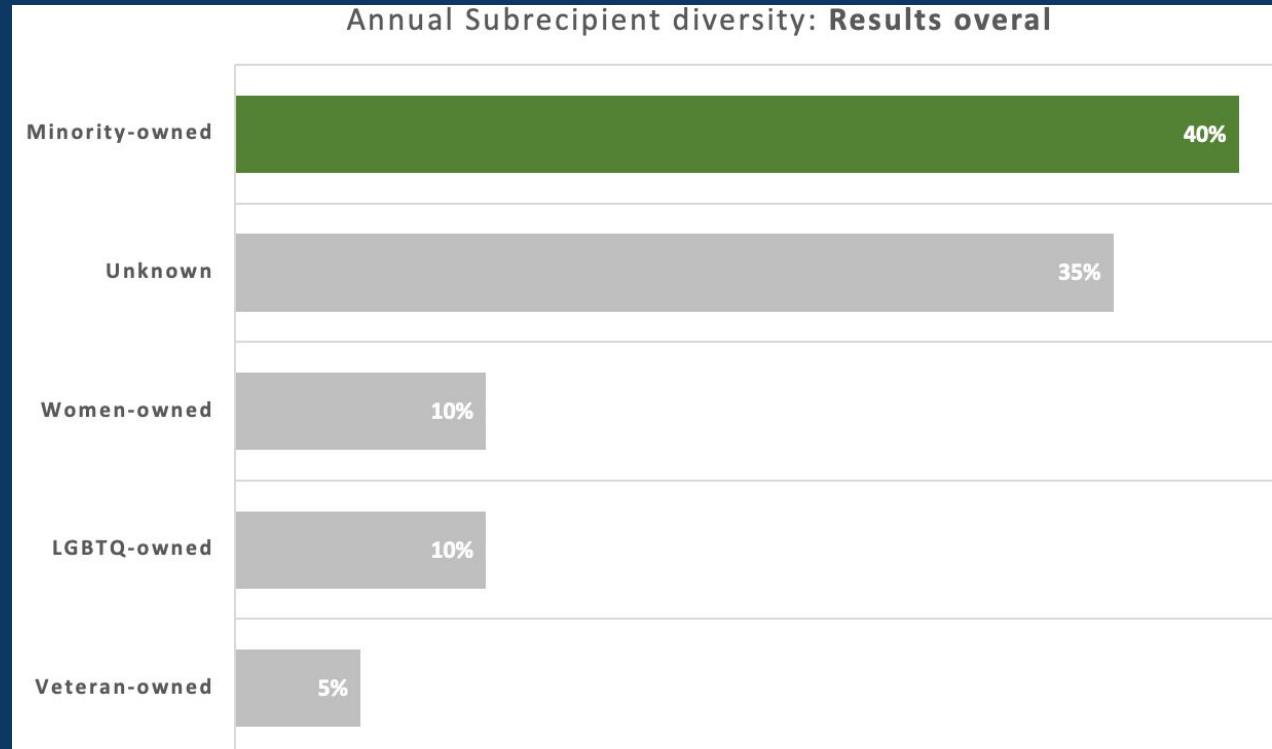
Story focus

Focusing audience on what is interesting

Focus on call to action

Annual Subrecipient diversity: **Results overall**

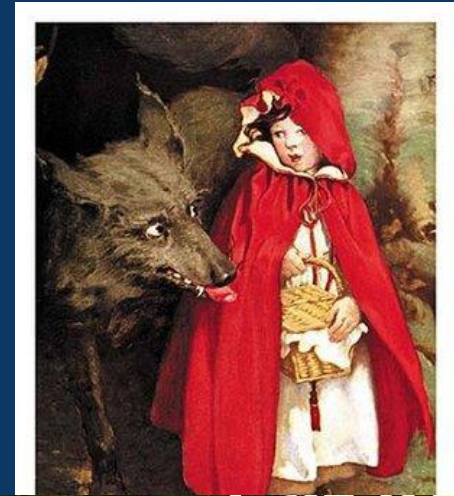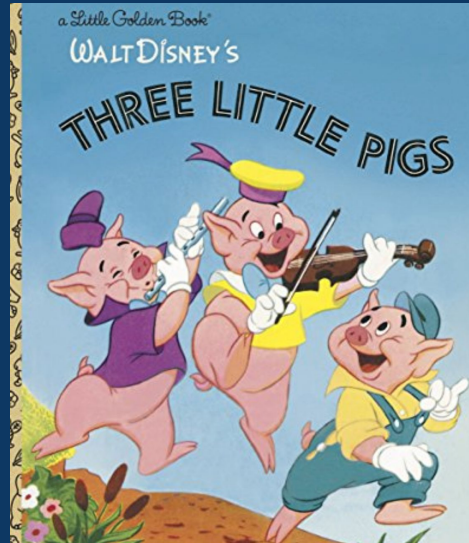|	
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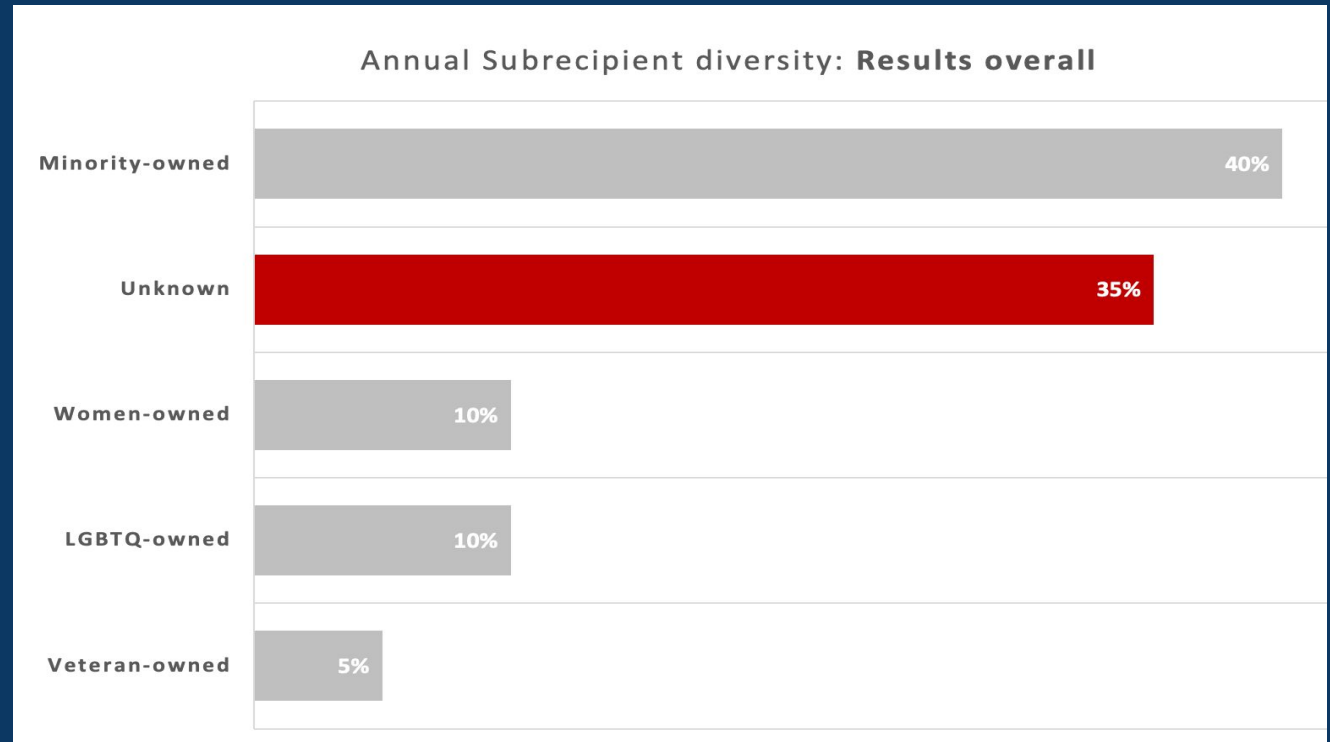
Storytelling basics

1 focus attention
2 tell a **story**

Story structure

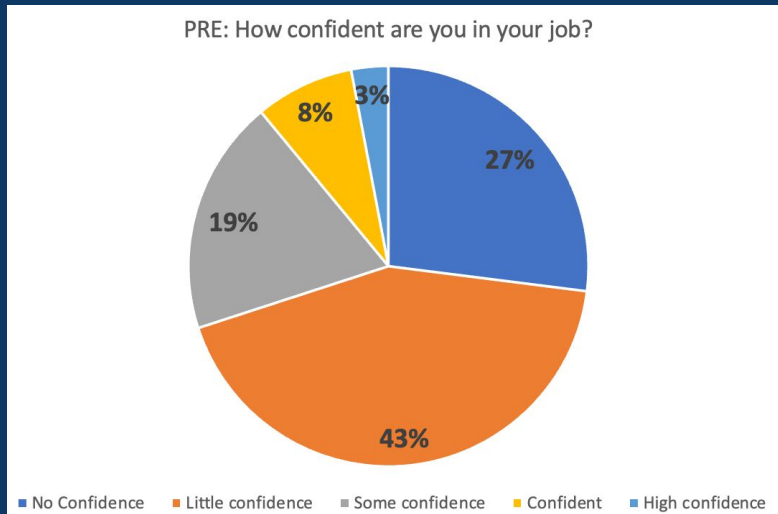Why do we remember songs and phrases?

Interesting & repetitive

Story Structure

1 **plot**   what context is essential?
2 **twists**   what is interesting about the data?
3 **ending** what do you want your audience to do?

Story structure

Can you spot the story?

PRE: How confident are you in your job?

27%
43%
19%
8%
3%

■ No Confidence   ■ Little confidence   ■ Some confidence   ■ Confident   ■ High confidence

POST: How confident are you in your job?

11%
19%
27%
36%
7%

■ No Confidence   ■ Little confidence   ■ Some confidence   ■ Confident   ■ High confidence

Story structure

Narrative leads audience to what we have identified as interesting

PRE: How confident are you in your job?

8% 3%
19%
43%

■ No Confidence ■ Little confidence ■ Some confidence ■ Confident ■ High confidence

POST: How confident are you in your job?

7% 11%
19%
27%

■ No Confidence ■ Little confidence ■ Some confidence ■ Confident ■ High confidence

After the program 63% program participants expressed confidence in their job post-program participation compared to 27% pre program participation.
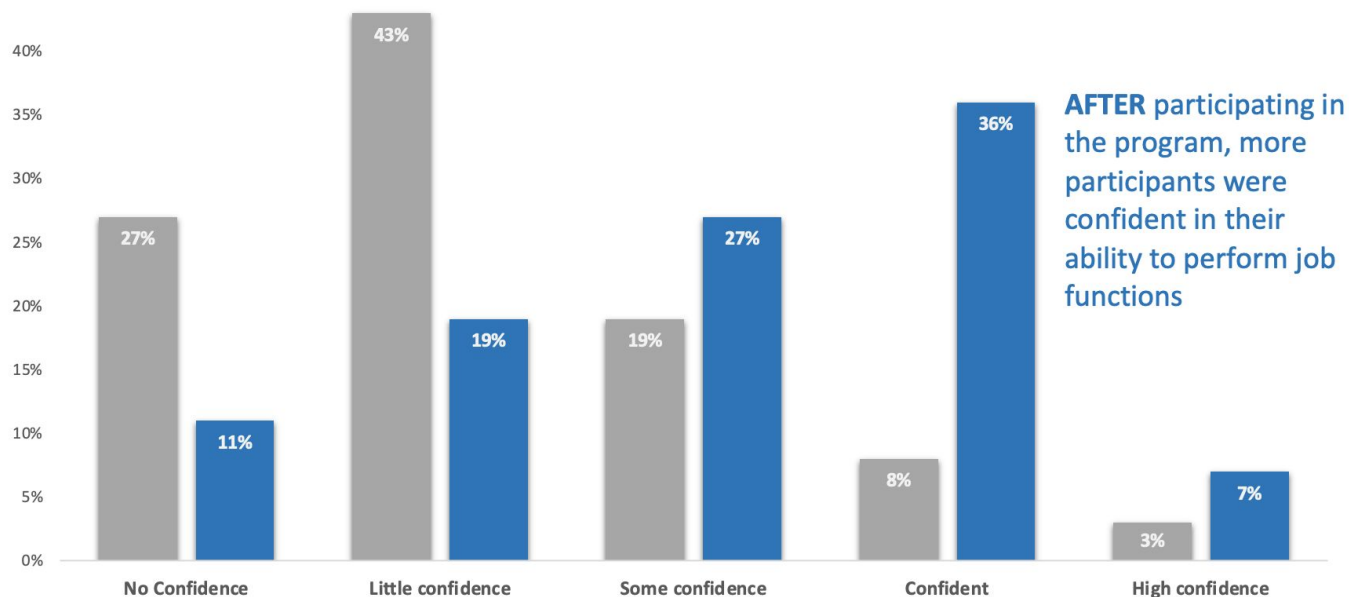
Story structure

The healthcare peer support specialist program shows mostly positive impact on participants on the job confidence after apprenticeship program. **We recommend continuing to fund it.**

How confident were they in their job?
BEFORE participating in the program, the majority of the participants had little to no confidence in the ability to perform job functions.

AFTER participating in the program, more participants were confident in their ability to perform job functions

Chart categories: No Confidence (27%, 11%), Little confidence (43%, 19%), Some confidence (19%, 27%), Confident (8%, 36%), High confidence (3%, 7%)

Story structure

Plot

Ending

The healthcare peer support specialist program shows mostly positive impact on participants or job confidence after apprenticeship program. **We recommend continuing to fund it.**

Twist: **Falling action**

How confident were they in their job?
BEFORE participating in the program, the majority of the participants had little to no confidence in the ability to perform job functions.

Twist: **Rising action**

AFTER participating in the program, more participants were confident in their ability to perform job functions

	No Confidence	Little confidence	Some confidence	Confident	High confidence
Gray	27%	43%	19%	8%	3%
Blue	11%	19%	27%	36%	7%
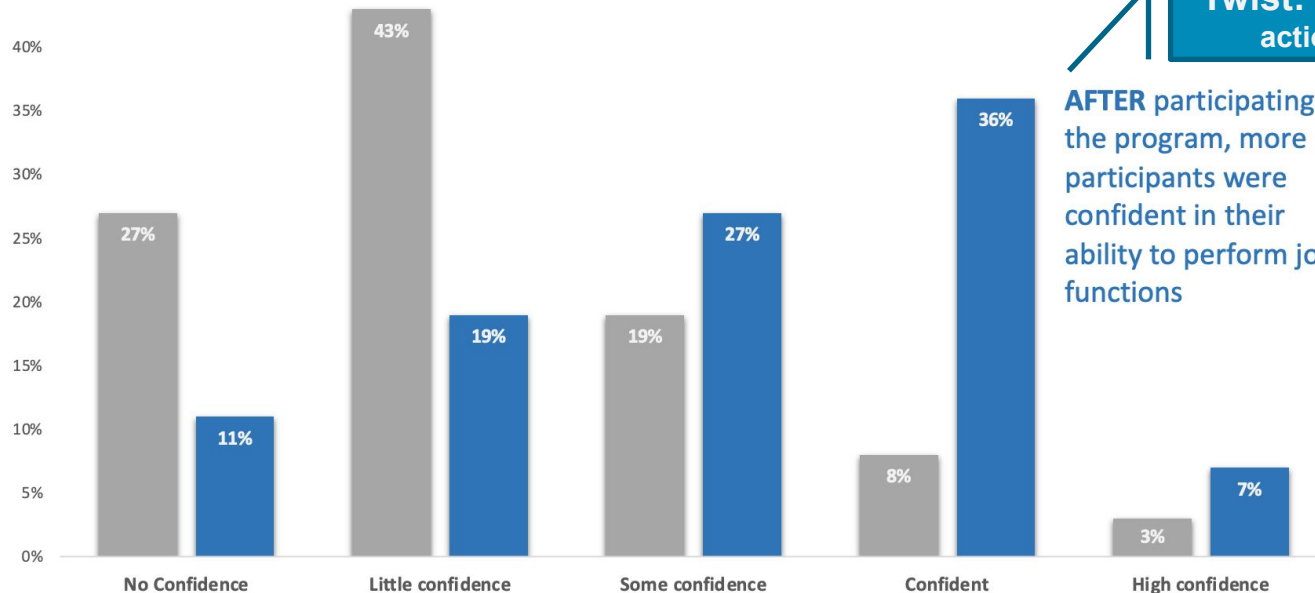
Cultivating story telling

How do I develop this in my organization?

1 **start small** focus and story structure
2 **competency** data literacy through transparency
3 **upskill** quantitative skills vs. visualization design
4 **questioning** feedback is good!

Breakout Session

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Breakout Scenario

The workforce board has identified **Healthcare** as a priority sector for the region. **Training and access to living wages in entry level fields** have historically been a challenge. Existing programs **do not provide sufficient support** to enable participants to move along a pathway.

The board has decided to **launch an RFP to procure** an organization to design and implement healthcare pathways to support the advancement of diverse individuals. As healthcare is a priority for many regions across the US, the board believes there **must be other communities that have had success**.

The board also wants to **ensure that it receives a diverse set of respondents**, as it believes strongly in human-centered programs and wants lived experience to inform program design.

Breakout Discussion Questions

- What might success look like for this procurement based on what you know? (Brainstorm 2-3 outcomes)

- What groups might the board need to engage to support their process? (Identify 3-4 stakeholders)

- What data might we collect from the procurement process to tell a story? (Identify 2-3 things that could be measured)

Final Reflections

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Wrap Up & Next Steps

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Next Step Commitments

In the chat please write:

- The action you are committing to complete between now and your next meeting with RFA

- What you need from RFA to be successful

Upcoming Sessions and Resources

- ✓ **Don't forget to review materials and resources following the Convening on the Fellows Resource Page**

- ✓ **Participate in the May 23, 2:00pm EST - J-PAL LEVER "Starting your Evidence and Evaluation Journey Workshop" - this is part two of the series**

- ✓ **Good books to support your data storytelling journey by Cole Nussbaumer Knaflic and Resonate Nancy Duarte**

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WE WANT TO SUPPORT YOU!

PLEASE COMPLETE THE QUICK POLL ON THE SCREEN

THANK YOU!

Please send any follow-up questions to:
- **morgan@results4america.org**
- **jack@results4america.org**