RFA Workforce Fellows

Data Storytelling for Procurement - Evidenced Based Workforce Spending

May 17, 2023
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
Welcome and Introductions
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
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 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
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?
Peer Sharing: Advance Central PA
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
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

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 / 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?
## Gathering Data Throughout the Process

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

Bring your data to life with a story
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

**Figure 4.1e** Where are your eyes drawn?

**Figure 4.1f** Where are your eyes drawn?

*Credit: Knaflic, Cole Nussbaumer. Storytelling with data – Let’s practice!, Wiley, 2019*
Story focus

Practice the art of using preattentive attribute signals

How many “3”s?

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Story focus

Practice the art of using preattentive attribute signals

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Story focus

Focusing audience on what is interesting

Identify audience and measure/outcome

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<th>Ownership Type</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Minority-owned</td>
<td>40%</td>
</tr>
<tr>
<td>Unknown</td>
<td>35%</td>
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<tr>
<td>Women-owned</td>
<td>10%</td>
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<td>LGBTQ-owned</td>
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<tr>
<td>Veteran-owned</td>
<td>5%</td>
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Story focus

Focusing audience on what is interesting

Focus on positive

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 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?

POST: How confident are you in your job?
After the program 63% program participants expressed confidence in their job post-program participation compared to 27% pre program participation.
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.
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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
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
Wrap Up & Next Steps
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
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