Program Outreach: The Good, the Bad, and the Ugly

SCPa Works - Overview

① Eight counties in South Central PA (Harrisburg, York, Carlisle, Hershey)
Combination of urban, rural, and suburban

② Labor force = 750,000 | unemployment rate < 4.0%

③ Eight AJCs, two affiliate sites, 60+ community access points

④ Total budget = ~$15M, operational budget of $2M

Now, more than ever, we need to use our platform as workforce boards to identify new models of innovation and build out an infrastructure that reaches more people and serves our communities in better ways. – Jesse McCree, CEO, SCPa Works

Recording

Click "View session recordings" at the top right corner
Search "Program Outreach: The Good, the Bad, and the Ugly"

Resources:	Agenda:

• Slides
 	
• Outreach Brief for creative efforts, cornerstones for outreach plan, and compliance matters
 	
• WorkforceGPS Webinars:
  ◦ Outreach and Marketing for the Public Workforce Development System: Exploring the Possibilities!
  ◦ Post, Like, Follow, Share! Using Social Media as an Outreach and Marketing Tool
  ◦ Elevate Your Outreach
 	
• Training and Employment Guidance Letter (TEGL) 03-23
	• Understand Compliance
	
	• Explore Outreach Efforts
	
	• Learn from SCPa Works
	
	• Mastermind Your Outreach Sessions

Outreach Ideas Whiteboard from Synergy Forum Mastermind Group

The Mastermind Your Outreach Synergy Forum Group was an exploratory three-part series focused on peer-to-peer strategic planning and goal setting for outreach.

National Thought Leader from Pennsylvania

Jesse McCree is a national thought-leader in investing in human talent and is the CEO of SCPa Works, the workforce development board of South Central PA. With over 15 years of executive leadership in the non-profit and private sectors, Jesse has built and scaled strategic partnerships at the intersection of the future of learning and work. He leads SCPa Works' $15M annual investment to evaluate and advance high-impact workforce development programs that drive economic mobility. In partnership with businesses, education, and economic development providers, his team has established innovative outreach efforts with and without WIOA funds. Jesse also serves on several national boards, including the U.S. Conference of Mayors Workforce Development Council and the Federal Reserve Bank of Philadelphia's Economic and Community Advisory Council, and is Senior Advisor for Econsult Solutions, Inc. | jmccree@scpaworks.org

Relational Advice!

90% of the job is showing up, asking questions, and being engaged, whether it's a Chamber of Commerce event or a networking breakfast at the community college. Use those networks to help define yourself as a thought leader.

Rather than going to businesses and community partners with prescribed solutions, instead ask things like, "What problems are you trying to solve and in what ways can we be helpful?" – Jesse

Low-Cost Outreach!

Go where the people are. Use basic data gathering tools like heat maps to determine where people are – store fronts, food banks, faith-based organizations, etc. – and bring them fliers (old school) or post QR codes (new school) or a combo! – Jesse

Community Access Points = People + Resources + Technology

Community Access Points are touchpoints in strategic locations that offer actual services (a meeting with a career advisor) or a kiosk where people can plug-in to find services. Jesse is happy to share more about what works and what doesn't.

Outreach Brief

**Creativity
Cornerstones
Cost-effectiveness**

Outreach Efforts

educate

enroll

engage

extend referrals

The sky is the limit!

TEGL 03-23

Use WIOA as a launching point and watch the doors open! More resources outside of WIOA beget more resources. Use additional funding to test new programs, demonstrate value and efficacy, and prove WIOA eligibility. – Jesse

Explore your outreach strategy with monitors!

Go to your monitors. They are trusted advisors. They want to be guides and shepherds to the right source. – Jesse

Outreach Efforts Tried by Our Peers

- Website blogs
- Ads on scrolling displays at the mall
- Free TV interviews with local news
- Truck rodeo (contact Gretchen Steffan!)
- Radio shows/podcasts
- In-service presentations
- QR codes on fliers
- Outreach materials at laundromats, housing authorities, bus stops, etc.
- Mobile hours at public libraries
- Postcard campaigns
- Program testimonials
- Job fair at the Department of Social Services and public libraries
- Digital media campaigns to target audiences for specific programs
- Support community and program ambassadors

List of outreach efforts you have tried, tested, succeeded, or failed at!

Benchmark (Research and Preparation)

What resources can you utilize to prepare for your business outreach strategy?

- Reach out to Chambers of Commerce for lists of businesses. Local Economic Development or 👍1 ❤2
- Round table meetings with partners that may have previously attempted to outreach 👍2
- Host Meet the Employer sessions at the Career Center and offer a virtual option for the public attendees as well. 👍2
- Look at website, review job postings/job leads, company's social media. Job boards like Indeed or other sites 👍1 ❤1

- regional LMI / Bureau of Labor Statistics website 👍1
- What are other local areas doing? Figure it out!
- Network with connections that work at business
- News & print media, i.e. local business journal, newspaper, PennySaver
- Attend Business After Hours to gauge community interest 👍
- create a survey to connect with other agencies and then meet with them
- our chamber offers a Business After Hours event once per month at a local business, that is a great opportunity to see the business, talk to the employees and take a tour. 👍1
- Read up Significant Industry Reports

- meet with businesses that you have had success with to get their ideas for successful outreach
- Go visit the business
- WIOA BSR reaches out to their Regional DOL BSR and work together. 👍1
- Know why of your meetings!
- Use the people/ staff at your local Chamber office to help you connect with the businesses in the area.
- Meet the Business Services Rep
- Review membership of local business associations, i.e in Rochester, we connect with Rochester Tech & Mfg Association to find manufacturing companies
- Host businesses at the Career Center for recruiting events.

Understand (Target Audience)

How can you comprehend the bottom-line needs of your target businesses?

- Utilize networking with employers during larger events (such as the How it's MADE event held to showcase manufacturing and other hands-on employers.
- Community/ business surveys with follow up conversations directly with leaders of the busness.
- find entities where businesses come together and join them: Consider attending regional business service team meetings, Chamber of Commerce events, regional HR consortiums, etc.
- Use LMI to understand current and projected growth in the industry

- regional HR consortium
- work with local research and stats DOL employees to see trends and Work with DOL business services rep - get info from them
- 1:1 Conversations with HR Recruiters at businesses.
- Send online surveys to businesses to gauge needs 👍1 👥1
- Listen and ask questions. Do your homework beforehand so you have some idea.
- Surveys and polls on most up to date needs or concerns
- Stay current on industry info/ trends through member associations like SHRM, NHRA, etc.

Location: Where is our target audience typically concentrated?

- Post card instead of letter / Idea from Indiana
- DSS / Community Org / Areal Advertisement
- County Jails / Email blasts
- Stores / Libraries / Radio, Social Media
- Adult Ed programs, ACCESS-VR
- Job Fairs / Bowling Alley / Pizza places
- Community Events Workshops / Banners, Advertising - buses, local TV

Obstacles + Peer Learning = Opportunities

Monitors are allies in our success. Reach out to monitors and other local areas to explore outreach possibilities.

Our Responses: Have You Considered This Outreach Effort?

Create a simple survey to ask how people heard about your services and include it as part of your intake when new people come.	Yes	19
	No	4
	Not Sure	4
	New Idea!	6
Use program champions to share testimonials/success stories that speak directly peer-to-peer and reach them through their channels.	Yes	16
	No	11
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Initiate planned events where staff hold office hours and workshops at libraries, facilities, and organizations serving APoS customers.	Yes	16
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Pen a regular column for regional newspapers and business magazines.	Yes	8
	No	13
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	New Idea!	2
We have outreach plans developed for our programs, services, and target populations, businesses, partners, and community organizations.	Yes	12
	No	2
	Not Sure	3
	New Idea!	5

More About Synergy Forum Facilitators

Peter J. Nyitrai Jr. has been working with NYSDOL since 2017. Since February 2024 he has worked as an Auditor 2 (Employment &Training) in the office in Rochester, NY, providing oversight for assigned LWDAs. Peter grew up in the City of Buffalo and received his Bachelor of Science in Accounting and Minor in Marketing from Alfred University in 2011. After completing two master's degrees, one in Business Administration and another in Forensic Accounting, along with its work experience requirement, Peter became a Certified Fraud Examiner. Peter has enjoyed attending Annual Global Fraud Conferences since June 2019 and sharing insights in his work.

Juie and Meg's hands-on experience in workforce, education and leadership development programs informs their work at NYSDOL. They've traversed the streets building foundational partnerships and coalitions of support – the core of effective outreach and long-term program success.

Juie's community organizing and recruitment of participants with Teach for India, the Boys & Girls Clubs, and the University of Michigan have led to out-of-the-box outreach efforts. Meg's recruitment initiatives for regional programs and her communications background offer expertise in using storytelling as outreach to engage allies and participants.

Jesse, Juie, Meg, and Peter have developed this Synergy Forum to explore innovations as well as shed light on challenges for effective outreach with participants. They hope you join live and participate to help all succeed in outreach.

[Resources from past Workforce Synergy Forums](#) (under the Workforce Synergy Forum filter)

What is the Workforce Synergy Forum?

As leaders of workforce programs, we all face similar opportunities and thrive by asking questions, sharing practices, and learning from experts and peers. Workforce Synergy is a monthly forum that unites us to recognize, strategize and operationalize effective workforce practices. We will collectively build the synergy we want and need for our workforce system. Leaders are encouraged to attend live for active, real-time collaboration, networking, and direct Q&A.

Synergy Principles – (STEP-CC)

Safety

Trustworthiness and Transparency

Empowerment, voice, and choice

Peer support

Collaboration and mutuality

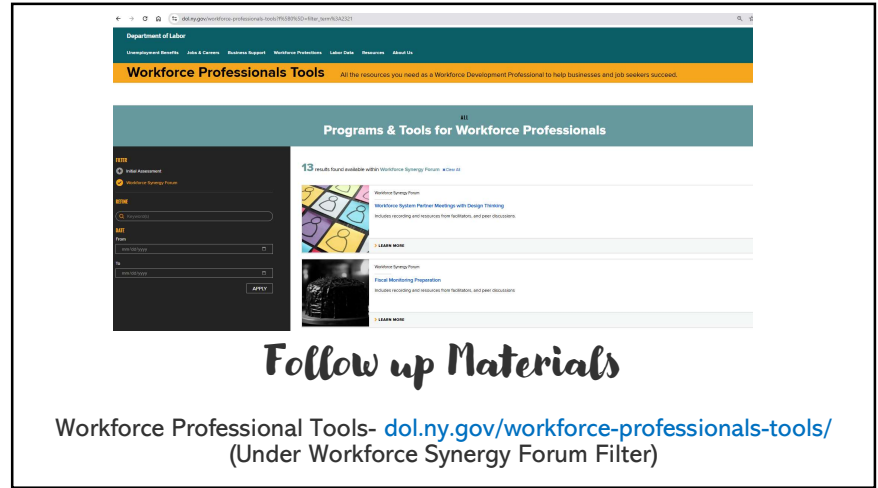**C**ultural, historical, and gender inclusion

Inspired? Questions? Collaborate! LWDB@labor.ny.gov | 518-457-3555

Brought to you by the Local Workforce Leaders and New York State Department of Labor

The
WORKFORCE
SYNERGY FORUM

1

Synergy Forum

Workforce Leaders Unit to Strategize and Operationalize Successful Practices

2

Follow up Materials

Workforce Professional Tools- dol.ny.gov/workforce-professionals-tools/
(Under Workforce Synergy Forum Filter)

3

November 26, 2:30p Synergy Forum

Fostering Collaborations:

Regional Business Services Teams

(RBSTs)

Purposeful	Personalized	Proactive	Planned	Prompt
100	100	100	100	100
200	200	200	200	200
300	300	300	300	300

Finger Lakes	Western
0	0
+ −	+ −

LWDB@labor.ny.gov
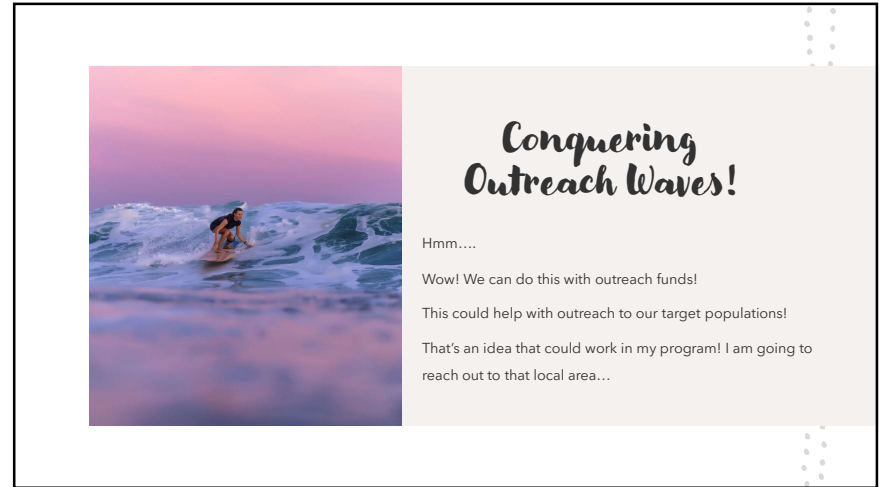
4

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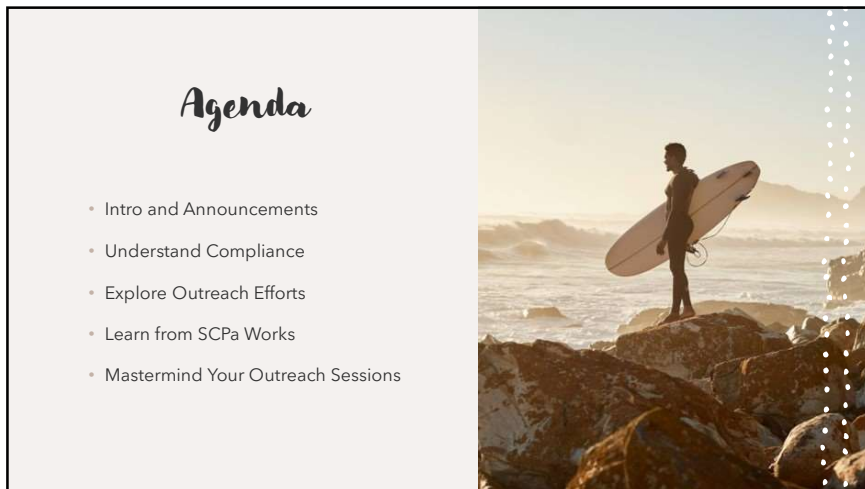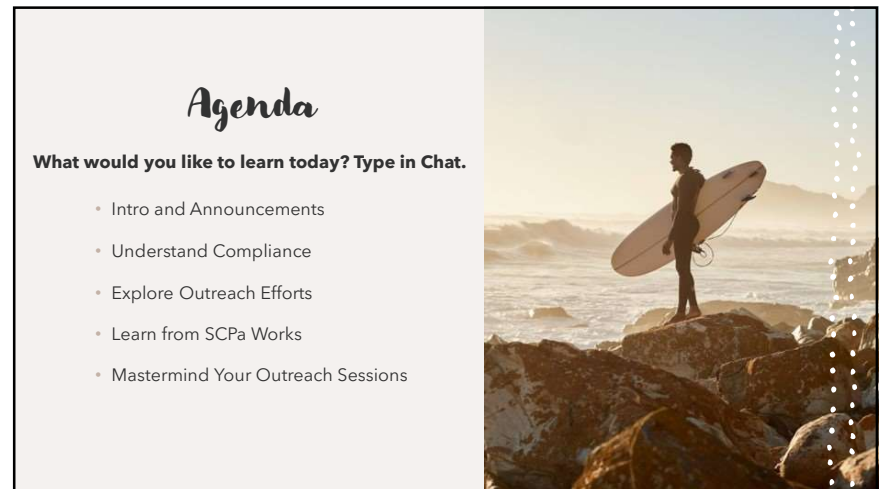**C**ultural, historical, and gender inclusion

Outreach! The Good, the Bad and the Ugly

Conquering Outreach Waves!

Hmm….

Wow! We can do this with outreach funds!

This could help with outreach to our target populations!

That's an idea that could work in my program! I am going to reach out to that local area…

Agenda

- Intro and Announcements
- Understand Compliance
- Explore Outreach Efforts
- Learn from SCPa Works
- Mastermind Your Outreach Sessions

Agenda

What would you like to learn today? Type in Chat.

- Intro and Announcements
- Understand Compliance
- Explore Outreach Efforts
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Legal Reasons for Outreach

To fully communicate the workforce system's value and expand awareness of its services to job seekers and employers, the system must conduct effective and targeted outreach.

WIOA requires grantees to inform the public about services, conduct proactive outreach to underserved populations, and make individuals aware of services that can support their employment needs.

TEGL 03-23
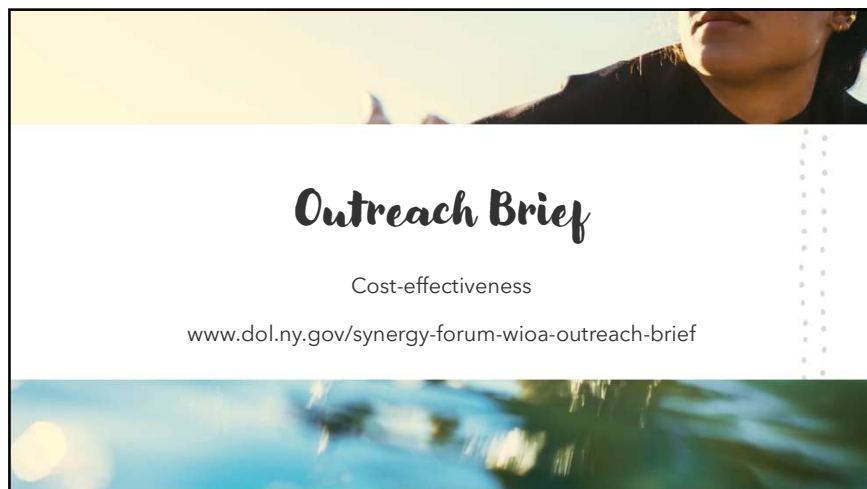
Outreach Efforts

educate

enroll

engage

extend referrals

The sky is the limit!

TEGL 03-23

Outreach Brief

Cost-effectiveness

www.dol.ny.gov/synergy-forum-wioa-outreach-brief

Advertising

Allowable activities include promoting program outreach and other specific purposes necessary to meet the requirements of the grant award.

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Allowable activities include promoting program outreach and other specific purposes necessary to meet the requirements of the grant award.

Allowable through various media strategy examples:

- Print, electronic, digital, radio, social media
- Billboards/signage
- Text apps
- QR codes

20XX

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Public Relations

Activities that promote Federally funded activities, services, and programs, and are typically personnel costs.

14

Public Relations

Activities that promote Federally funded activities, services, and programs, and are typically personnel costs.

Public Relations examples: attendance at, facilitation of, collaboration with, or participation in job/career/community fairs, rapid response events, one-stop satellite centers/mobile one-stops, community access points, high school/college career day, podcasts and other interviews, etc.

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Advertising and Public Relations are Allowable

While advertising of Federally funded activities, services, and program offerings might be present at a public relations event, public relations differ from advertising in that staff typically interact directly with the community, public, or press during public relations activities.

Advertising and public relations are an allowable outreach cost for grant activities, services, and programs.

16

Compliance

How will you be able to evaluate whether chosen the outreach effort is effective?

17

Compliance

How will you be able to evaluate whether chosen the outreach effort is effective?

If costs are to be shared with other funding streams, are costs being allocated properly?

18

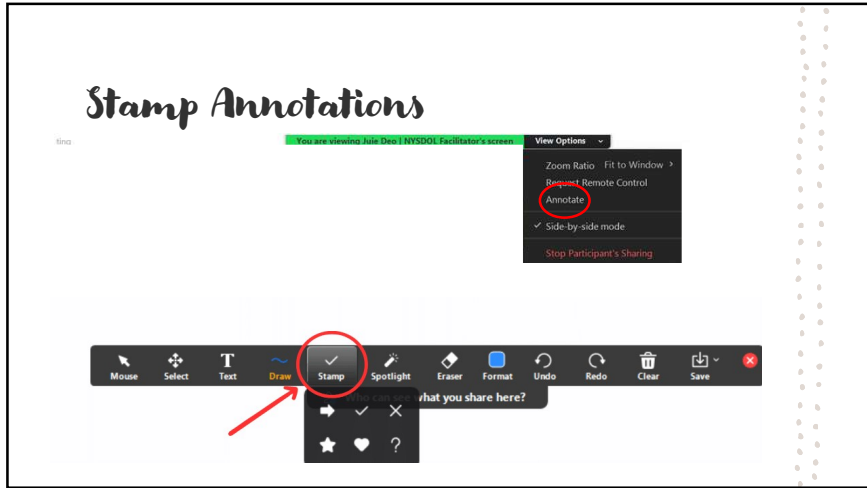Explore your outreach strategy with monitors!

19

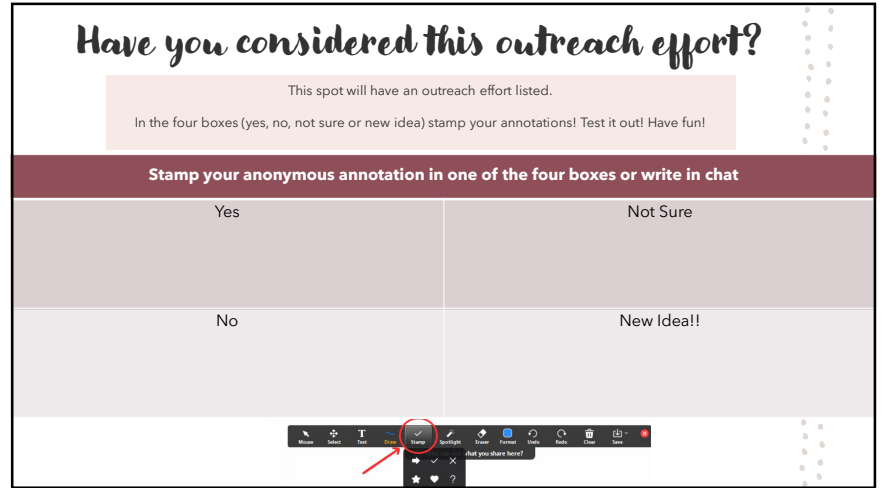## Outreach Brief

Creativity | Cornerstones
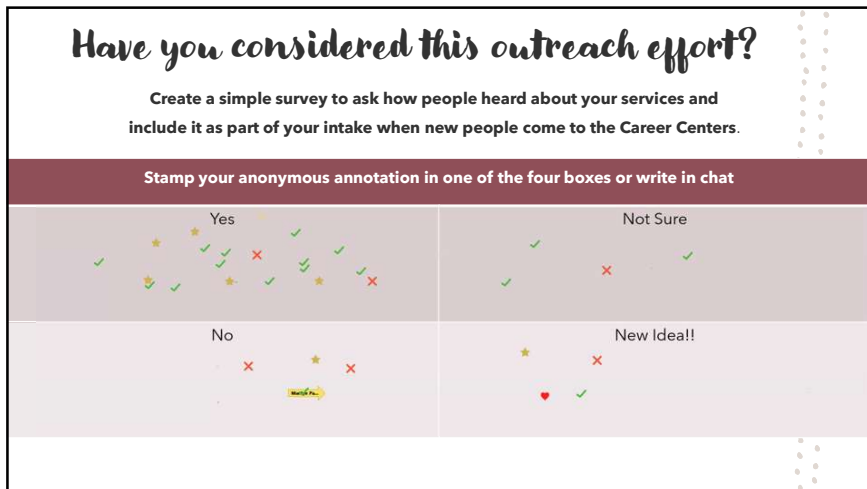
www.dol.ny.gov/synergy-forum-wioa-outreach-brief

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Slide 21

Stamp Annotations

tinz

You are viewing Juie Deo | NYSDOL Facilitator's screen — View Options ⌄

Zoom Ratio   Fit to Window ›
Request Remote Control
Annotate
✓ Side-by-side mode
Stop Participant's Sharing

Mouse | Select | Text | Draw | Stamp | Spotlight | Eraser | Format | Undo | Redo | Clear | Save

21

Slide 22

Have you considered this outreach effort?

This spot will have an outreach effort listed.

In the four boxes (yes, no, not sure or new idea) stamp your annotations! Test it out! Have fun!

Stamp your anonymous annotation in one of the four boxes or write in chat

Yes	Not Sure
No	New Idea!!

22

Slide 23

Have you considered this outreach effort?

Create a simple survey to ask how people heard about your services and include it as part of your intake when new people come to the Career Centers.

Stamp your anonymous annotation in one of the four boxes or write in chat

Yes	Not Sure
No	New Idea!!

23

Slide 24

Have you considered this outreach effort?

Use program champions to share testimonials/success stories that speak directly peer-to-peer and reach them through their channels.

Stamp your anonymous annotation in one of the four boxes or write in chat

Yes	Not Sure
No	New Idea!!

24

Have you considered this outreach effort?

We use the broadest definition of dislocated workers as listed in the Program Guidance Letter #22-01 for our enrollments.

Stamp your anonymous annotation in one of the four boxes or write in chat

Yes	Not Sure
No	New Idea!!

25

Have you considered this outreach effort?

Initiate planned events where staff hold office hours and workshops at libraries, facilities, and organizations serving Adult Priority of Service (APoS) customers.

Stamp your anonymous annotation in one of the four boxes or write in chat

Yes	Not Sure
No	New Idea!!

26

Have you considered this outreach effort?

Pen a regular column for regional newspapers and business magazines.

Stamp your anonymous annotation in one of the four boxes or write in chat

Yes	Not Sure
No	New Idea!!

27

Have you considered this outreach effort?

We have outreach plans developed for our programs, services, and target populations, businesses, partners, and community organizations.

Stamp your anonymous annotation in one of the four boxes or write in chat

Yes	Not Sure
No	New Idea!!

28

Slide 29

Our Responses: Have You Considered This Outreach Effort?

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Slide 30

List of outreach efforts you have tried, tested, succeeded, or failed at!

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Slide 31

Outreach! The Good, the Bad and the Ugly!

SCPa WORKS
SOUTH CENTRAL WORKFORCE DEVELOPMENT BOARD

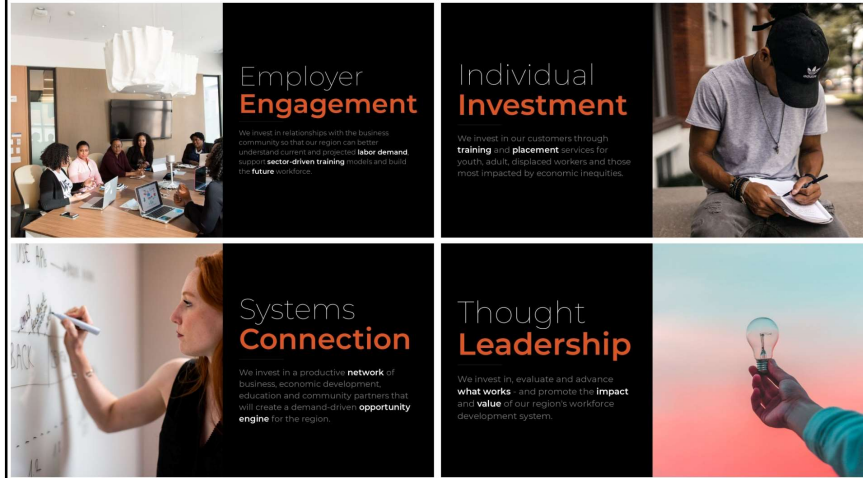Our mission is to unlock the human talent that drives the development of businesses and individuals.
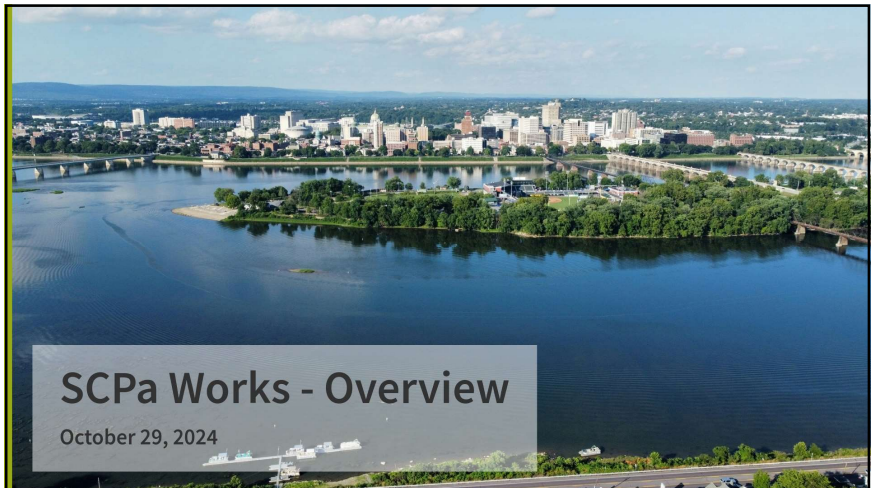
Jesse McCree

CEO

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Slide 32

SCPa Works - Overview

October 29, 2024

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Slide 33

SCPa Works - Overview

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   Combination of urban, rural, and suburban

2. **Labor force = 750,000 | unemployment rate < 4.0%**

3. **Eight AJCs, two affiliate sites, 60+ community access points**

4. **Total budget = ~$15M, operational budget of $2M**

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Slide 34

Employer **Engagement**
We invest in relationships with the business community so that our region can better understand current and projected **labor demand**, support **sector-driven training** models and build the **future** workforce.

Individual **Investment**
We invest in our customers through **training** and **placement** services for youth, adult, displaced workers and those most impacted by economic inequities.

Systems **Connection**
We invest in a productive **network** of business, economic development, education and community partners that will create a demand-driven **opportunity engine** for the region.

Thought **Leadership**
We invest in, evaluate and advance **what works** – and promote the **impact** and **value** of our region's workforce development system.

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Slide 35

SCPa Works Local Plan - Executive Summary

key elements of 2021-2025 strategic plan

Sector strategies
Healthcare, Manufacturing, IT and Hospitality/Tourism

Focus on short-term training and credentials
Apprenticeships, OJT and industry-recognized credentials

Economic mobility
Focus on "opportunity" jobs, such as entry-level IT

Integrated & hybrid service delivery
Leverage our PA CareerLink partners and community

Thought leadership
Go-to source for labor market trends and solutions

Community Access Points (CAP)
Increase reach, engagement, and scalability

Populations with barriers
Support populations that need holistic support (ALICE, justice-involved)

Embed employer engagement
Engage, PREP, Next Gen IP and Regional Business Services

Inclusion, Diversity, Equity, and Accessibility (IDEA)
Build evaluation framework into everything we do

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Slide 36

Creating a Future Focused Workforce System

Current state of WDBs

What future-focused WDBs look like

Leveraging outreach for impact

SCPa WORKS

Community Access Points (CAPs)

Systems and infrastructure

New models of innovation

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Outreach Brief

Creativity | Cornerstones | Cost-effectiveness

Workforce Professional Tools- dol.ny.gov/workforce-professionals-tools/
(Under Workforce Synergy Forum Filter)

SYNERGY FORUM
MASTERMIND GROUP

Mastermind Your Outreach

WIOA requires outreach to individuals, businesses, and communities to create and grow awareness of workforce services. Outreach not only supports recruitment and enrollment goals, but also develops connections with important allies for program success and sustainability.

What to Expect

Join our Synergy Forum Mastermind Group for action planning and accountability in outreach. This mastermind mini-series will help create and elevate outreach plans through peer-to-peer strategic planning and goal setting.

Come with an open mind, ready to share ideas, solutions, and resources. Learn from each other's successes and failures. Leave with a simple action plan ready for immediate action.

Sample (Simple!) Action Plan

- Things we can do today
- Things we can do in the next month
- Things we can do in the next 3-6 months
- How to track, analyze and adjust

Details

November 5, 2:30-3:30 pm
COMMUNITY ENGAGEMENT

November 12, 2:30-3:30 pm
BUSINESS/ECONOMIC DEVELOPMENT ENGAGEMENT

November 19, 2:30-3:30 pm
OUTREACH FOR PROGRAM SERVICES

Mastermind Group: Community Engagement

Frame 1-40

	3-6 Months Actions	Next Month Actions	24 Hours Actions
Community Engagement Actions			
Ways to Track, Analyze, Adjust Actions			

Name-Role

Check Mastermind Ideas from Peers:
https://tinyurl.com/outreach-mastermind-whiteboard

Mastermind Group: Business Engagement

B - Benchmark (Research and Preparation)
What resources can you utilize to prepare for your business outreach strategy?

U - Understand (Target Audience)
How can you comprehend the bottom-line needs of your target businesses?

S - Strategize (Outreach Strategies)
What are your short-term (24-hour, next month, 3-6 months) outreach goals?

I - Inform (Content and Messaging)
How have you refined your messaging to businesses?

N - Nurture (Follow-up and Relationship Building)
What strategies do you employ to build lasting relationships with businesses?

E - Evaluate (Evaluation and Adjustment)
How do you measure qualitative and quantitative success?

SS - Sustain & Strategize (Tips for Maintaining Momentum)
How do you establish sustainable outreach efforts?

Poll: Pick a Target Program to Expand Outreach

1) A/DW

2) Youth

3) SCION

4) Business Engagement (Title I or III)

5) Other – write in chat

6) Veterans

7) TAA

Check Mastermind Ideas from Peers:
https://tinyurl.com/outreach-mastermind-whiteboard

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Mastermind Group: Program Outreach

Indicators: What metrics will we use to assess and refine our outreach strategy regularly?

Audience: What are their key characteristics and demographics?

Target

Action Plan: What are our 3-6 month, next month, and 24-hour outreach goals?

Location: Where is our target audience typically concentrated?

Assets: How can these individuals contribute to the outreach efforts? Participants, Ambassadors, Staff

Check Mastermind Ideas from Peers: https://tinyurl.com/outreach-mastermind-whiteboard

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November 26, 2:30p Synergy Forum

Fostering Collaborations:

Regional Business Services Teams

(RBSTs)

Purposeful	Personalized	Proactive	Planned	Prompt
100	100	100	100	100
200	200	200	200	200
300	300	300	300	300

Finger Lakes: 0

Western: 0

LWDB@labor.ny.gov

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Outreach Brief

This document serves as a brief, or a training supplement, for Local Workforce Development Boards (LWDBs) to develop an outreach plan for Workforce Innovation and Opportunity Act (WIOA) programs. The brief was developed for the Workforce Synergy Forum and related Mastermind Groups on this topic, with local workforce leaders and the New York State Department of Labor (NYSDOL).

Contents

WIOA requires LWDBs to:

- o   Inform the public about services;

- o   Reach out to underserved groups; and

- o   Connect individuals and businesses with services that support their employment needs.

LWDBs can use WIOA funds to effectively and equitably conduct outreach to meet the needs of, and better engage, individual and business customers. Outreach activities promote our services and programs to educate, enroll, employ, or extend referrals to individuals and businesses. Effective, targeted outreach showcases the workforce system's value to the community. Consider community and program needs when developing outreach plans.

CREATIVITY: EFFORTS FOR CONDUCTING EFFECTIVE OUTREACH

The below are tried and true outreach activities and efforts. Put your own spin on them and have fun making connections! As your reach grows with these simple, no/low-cost activities, your overall vision for outreach and marketing may expand. With this, you might start thinking about dedicating more resources (time and money) to outreach and marketing. Remember, NYSDOL Fiscal Monitors are an available resource to help determine if specific costs are allowable.

(1) Community Engagement

Become a thought leader. Local radio stations and newspapers often look for stories and are happy to run provided content.

- o   Instead of paying for a radio ad, ask for a bi-weekly or monthly spot to talk about labor market information and the state of the local economy. If the station insists on paid time, find business partners to sponsor the session and join as guests.

- o   Pen a regular column for regional newspapers and business magazines.

Join local clubs (e.g. Urban League, Kiwanis, or Rotary)

- o   If the membership costs are too steep or the time commitment too high, become acquainted with club leadership and ask to get on their presentation schedule. This will give you a platform to share other services, such as Northstar digital literacy, and meet new community partners.

    Use social media to create new, and expand existing, community partnerships.

- o   Seek out and "like" pages of community partners, like local recreation departments, food pantries, social services, and faith groups. Introduce ourself via a direct message on the social media platform. Share their content on your pages and ask them to share yours.

- o   Piggyback off programs and events that are relevant to your own. Consider sponsorship opportunities if partners are already doing significant outreach to similar audiences.

(2) Business Customer Engagement

Create programs to recognize employers and award annual "Best Places to Work."

- o Use the [U.S. Department of Commerce and Labor Good Jobs Principles](#) for a framework.

Leverage LWDB members to market services to their networks.

- o Support LWDB members to try out your services such as on-the-job training (OJT), transitional jobs, or youth work experiences so they can eventually be the ambassadors of your programs and services.

Establish the team as a key advisor to the local Chamber of Commerce and economic development agencies.

- o Invite their leadership to be on the LWDB.
- o Volunteer to participate in real estate prospect tours, offer labor market information, and ask, "What can we do for you?" instead of sharing a prescribed menu of services.

Don't forget about small businesses.

- o Ask, "What can we do to provide training to your current employees so you can retain them?"
- o Convene quarterly learning series to present on key topics such as OJT and apprenticeship.

> ### EVOLVING OUTREACH EFFORTS!
>
> Recruitment/enrollment is only one aspect of outreach.
>
> As our staff, customers, businesses, and communities evolve, so must our outreach efforts.
>
> Share your evolving outreach ideas with LWDB@labor.ny.gov and your peers.

(3) Career and Training Services

Leverage existing relationships with businesses for reverse referrals.

- o Promote OJT as a cost-saving opportunity for employers. Communicate to employers that they can refer their candidates to you. For example, we can help close the skills gap for candidates who are a good cultural fit for businesses but lack key required skills.

Create and distribute flyers with QR codes for specific programs.

- o Send the QR codes to community newsletters, faith-based bulletins, etc.
- o Post flyers at government office buildings, public libraries, Motor Vehicle offices, community and behavioral health centers, public housing, recreation hubs, or any place where people gather. Host pop-up job fairs at libraries or community centers. Use their social media channels to advertise ahead of time, and use a hook, such as free cookies, to generate traffic. Utilize heat maps to determine the locations of outreach.

(4) Adult Priority of Service (APoS) Populations

o   Establish strong relationships with social services providers and use them as a primary referral source.

o   Initiate planned events where staff hold office hours and workshops at organizations serving APoS customers, and invite these partners to bring their customers into Career Centers for tours and orientation.

o   Establish multi-sector partnerships with key community organizations to provide comprehensive wraparound services to shared customers.

o   Form partnerships with businesses willing to invest in their people and communities through OJT, transitional jobs, and other services.

(5) Out-of-School Youth

o   Use program champions to share testimonials/success stories that speak directly peer-to-peer and reach them through their channels.

o   Go to college and career fairs at high schools and present viable options for non-college-bound high schoolers. Obtain their contact info and curate email blasts tailored to the audience.

o   Establish relationships with high school guidance counselors (they will be thrilled to hear from you!), and ask them to refer non-college-bound seniors to you.

o   Encourage referrals from businesses and community partners you typically refer to for youth who need work readiness, training, job placements, etc.

o   [Recruitment and Outreach Innovation (ROI) checklist](#) developed by youth professionals utilizing Positive Youth Development principles.

(6) Track Outreach

o   Create a simple survey to ask how people heard about your services, and include it as part of your intake when new people come to the Career Centers. This will help determine what outreach strategies are working. Regularly analyze the info and revise your outreach strategies accordingly.

(7) Resources

o   [Outreach and Marketing for the Public Workforce Development System: Exploring the Possibilities!](#)

o   [Post, Like, Follow, Share! Using Social Media as an Outreach and Marketing Tool](#)

o   [Elevate Your Outreach](#)

- Resource guide for engaging employers by Jobs for Future highlighting diverse (advising, capacity-building, co-design, convening, leading) roles businesses play to meet the talent needs of the community.
- Workforce Synergy Forum "Outreach! The Good, the Bad and the Ugly" and Resources at: Workforce Professional Tools (Under Workforce Synergy Forum Filter)

CORNERSTONE: STRATEGIES FOR OUTREACH EFFORTS

WIOA allows local areas to recruit personnel and program participants, and to engage businesses using WIOA funds. If any of the following questions are relevant to the local area, then the necessity of an outreach plan and funds is evident.

(1) Program and Services

- Do we need to enroll more individual and business customers, and if so, for which services and programs? (Check Kids Count Data Book and Census Bureau)
- Is our cost per participant reasonable?
- How can we spend our training funds effectively?
- What needs to be done to improve our priority of service requirements?
- Have we recruited personnel like our potential customers or with similar lived experiences?
- Have we considered cost-effective ways to create an online social media presence?
- Are community members aware of our services and programs?
- *(Add other relevant questions)* _____

(2) Community

- Does our community need our services? What fraction of priority of service populations from our community do we serve? Get intel from the NYSDOL Data Center.
- Are WIOA funds and services sufficient to meet our community's workforce needs?
- Have we consulted with appropriate community service groups about ways we may improve our outreach and services to various populations?
- Do we have volunteer ambassadors or champions in the community who promote our services, because of the quality of our services and programs?
- *(Add other relevant questions)* _____

(3) Individual and Business Customers

- What outreach network needs to be built to increase the social capital of individual and business customers, such as partners to refer to, support systems, and resources?

- How do our individual and business customers promote our programs and services?
- How can we use text messaging applications to reach customers better?
- What are ideas and suggestions for outreach from our targeted customers?
- *(Add other relevant questions)* _____

(4) Partners

- Which partner services can we leverage?
- Which services and programs meet our partners' goals to support the co-enrollment of customers?
- How can we encourage partners to amplify our online/social media presence?
- *(Add other relevant questions)* _____

(5) Assessments and Aspirations

- Do we aim to expand our organization's fiscal reach and impact within the community, potentially through non-WIOA programs and grants?
- What ideas and suggestions can we utilize from our internal staff?
- What have local areas of a similar size and demographics done for an outreach program? Has it worked for them?
- What does a local area with an effective outreach strategy look like? How can we identify them and find out what's working for them?
- *(Add other relevant questions)* _____

DEVELOP AN OUTREACH PLAN!

All great plans start with generating ideas and then identifying the great ideas from the good ideas.

An outreach plan helps!

(5) Synergy Mastermind Group: Community, Business and Program Outreach Templates

The Mastermind Your Outreach Synergy Forum Group was an exploratory three-part series focused on peer-to-peer strategic planning and goal setting for outreach.

Outreach ideas discussed by Mastermind Group are listed on this **whiteboard.**

Outreach plan templates used by the Mastermind Group are on the following pages.

COMMUNITY ENGAGEMENT

Community Engagement Actions

Time Frame	Actions	Ways to track, and analyze, adjust actions
Within 3-6 months actions		
Within the Next month actions		
Within 24 hours actions		

B.U.S.I.N.E.S.S. Engagement

B – Benchmark (Research and Preparation)

What resources can you utilize to prepare for your business outreach strategy?

U – Understand (Target Audience)

How can you comprehend the bottom-line needs of your target businesses?

S – Strategize (Outreach Strategies)

What are your short-term (24-hour, next month, 3-6 months) outreach goals?

I – Inform (Content and Messaging)

How have you refined your messaging to businesses?

N – Nurture (Follow-up and Relationship Building)

What strategies do you employ to build lasting relationships with businesses?

E – Evaluate (Evaluation and Adjustment)

How do you measure qualitative and quantitative success?

SS – Sustain and Strategize (Tips to Maintain Momentum)

How do you establish sustainable outreach efforts?

TARGETED PROGRAM OUTREACH

Program Type: **Name:**

Audience: What are their key characteristics and demographics?

Location: Where is our target audience typically concentrated?

Assets: How can Participants, Program Ambassadors, and Staff individually contribute to outreach efforts?
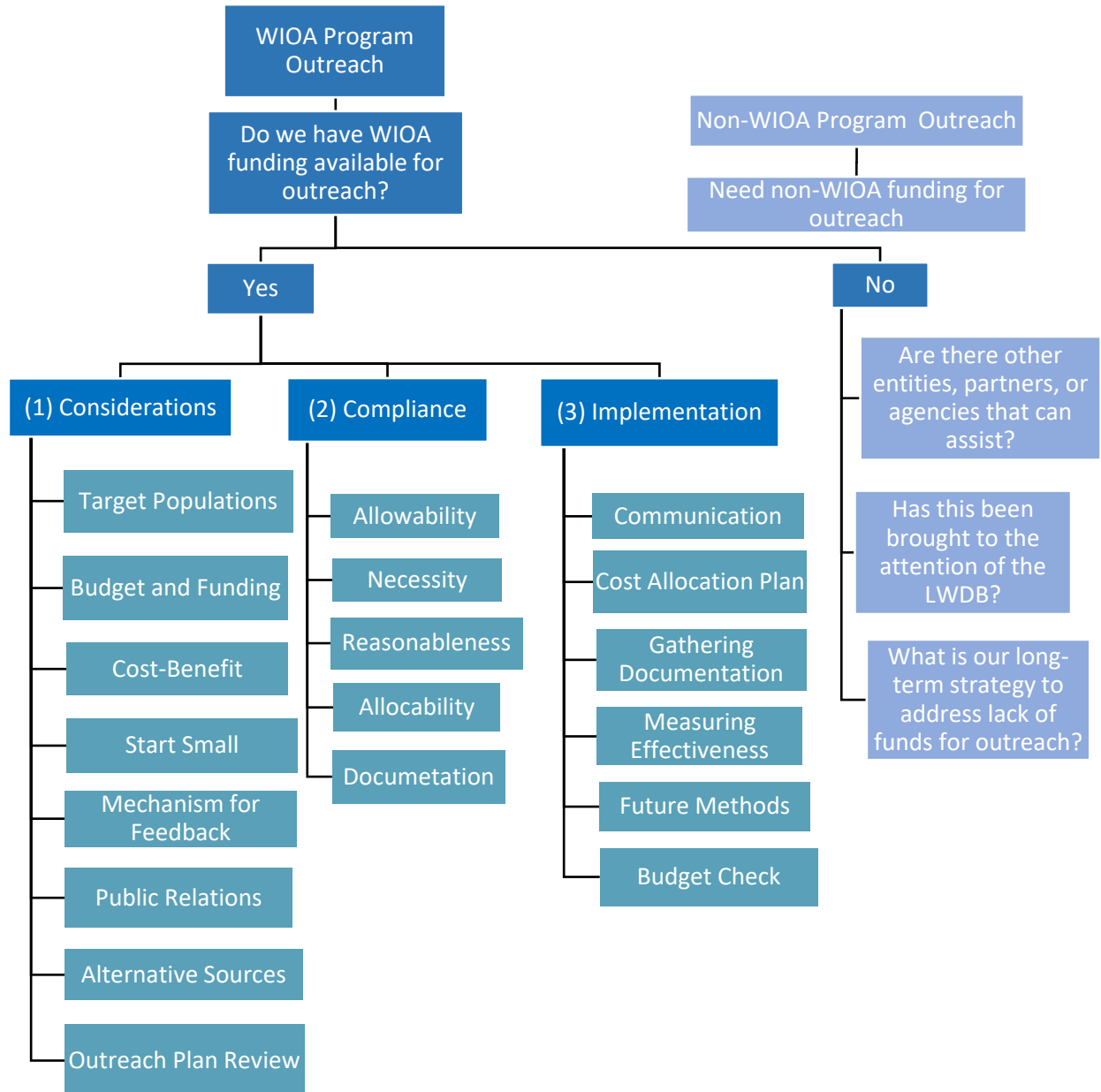
Action Plan: What are our 3-6 month, next month, and 24-hour outreach goals?

Indicators: What metrics will we use to assess and refine our outreach strategy regularly?

COST-EFFECTIVENESS FOR OUTREACH

Identify the funds you can use for the outreach plan. As you finalize your outreach activities, their cost-effectiveness can be evaluated. When using WIOA funds for outreach, the following cost-effectiveness decision tree offers a snapshot of:

(1) **Considerations** – Recommended fiscal matters for planning outreach efforts;
(2) **Compliance** – Fiscal requirements for finalizing outreach activities to implement; and
(3) **Implementation** – Fiscal steps when an outreach activity is finalized for implementation.

WIOA Program Outreach

Do we have WIOA funding available for outreach?

Non-WIOA Program Outreach

Need non-WIOA funding for outreach

Yes

No

(1) Considerations
- Target Populations
- Budget and Funding
- Cost-Benefit
- Start Small
- Mechanism for Feedback
- Public Relations
- Alternative Sources
- Outreach Plan Review

(2) Compliance
- Allowability
- Necessity
- Reasonableness
- Allocability
- Documetation

(3) Implementation
- Communication
- Cost Allocation Plan
- Gathering Documentation
- Measuring Effectiveness
- Future Methods
- Budget Check

Are there other entities, partners, or agencies that can assist?

Has this been brought to the attention of the LWDB?

What is our long-term strategy to address lack of funds for outreach?

(1) Considerations: Fiscal Recommendations Outreach Efforts

- o *Targeted Populations:* Who are we outreaching to? This will target our audience and aid with supporting the allocation of expense.

- o *Budgets and Funding:* What should we budget for this outreach method? Consider the cost vs. benefit of the expense. Does the LWDB need to modify the budget to shift funds internally? If funds are moved, what outreach needs will be addressed? Is the local area spending lower or higher than expected? For example, do we still have a substantial amount of unobligated and unspent funds for the Program Year? What do we need to support the allocation of WIOA funds for outreach for specific programs, services, or target populations?

- o *Cost-Benefit:* How do we consider cost vs. benefit? Project the effectiveness of reaching our audience and focus outreach efforts on communicating the necessary information to enlighten our target audience about what our program can do for them. A very expensive campaign may be fun and exciting, but if it doesn't bring people in, it was not a prudent use of funding.

- o *Start Small:* Have we started on a lower scale to ensure that the chosen outreach method is effective and not only an experiment? For example, if we choose allowable promotional items, we shouldn't buy a large quantity; start small and see what works before making a large purchase to avoid excess inventory of unpopular promotional items.

- o *Mechanism for Feedback:* How would we determine effectiveness or how will we measure if our outreach is successful? In the planning stages of outreach, consider what data we may be able to capture from our outreach to measure the effectiveness in a multitude of ways. This will help us plan future outreach efforts and over time we will build up awareness for what does or doesn't work.

- o *Public Relations:* If choosing a marketing or social media contractor or influencer, have we thought about their reputation, their follower base, legal vetting requirements, potential participant receptivity, cost-effectiveness, and performance-based contracting?

- o *Alternative Funding Sources:* If we take risks with our outreach, or want to supplement outreach, what other sources of funding are available to cover any costs that may not be allowable? Additionally, identifying alternative funding sources that may be available to cover potential disallowances also supports our outreach plan and budget.

- o *Outreach Plan Review:* Have we checked with our Program and Fiscal Monitors for feedback on the outreach plan?

(2) Compliance: Details of Using WIOA Funds for Outreach

We must ensure our activities are allowable. An allowable expense of federal funds is:

- o Necessary (2 CFR 200.403) to carry out the purpose of the federal award;

- Reasonable (2 CFR 200.404) in total cost such that under the same circumstances a prudent person would support funding the cost;

- Allocated appropriately (2 CFR 200.405) such that the cost is assigned in proportion to all benefitting funding cost centers based on a consistent and documented allocation method; and

- Supported by sound financial management (2 CFR 200.302) practices and records maintained, which include source documentation showing the amount and timing of the expense, as well as all required internal authorizations approving payment of the expense.

Allowability of Costs (overall):

What types of costs are not allowable? Understand the:

- Uniform Guidance, Office of Management and Budget Guidance at 2 CFR Part 200..400-200.476, Subpart E Cost Principles with *Basic Considerations*, *General Provisions for Selected Items of Cost* and specifically related to outreach, 2 CFR 200.421 on *Advertising and Public Relations*.

- TEGL 03-23: *Allowable uses of Funds for Outreach Activities for Federal Formula and Competitive Grant Awards* for guidance on allowability and outreach activities.

Necessity of Costs

- How is this cost necessary for the performance of the program and public relations?

- Will this cost assist the organization in achieving its grant's outcomes and goals?

- Does this cost adhere to the allowable expectations of both 2 CFR 200.403 and 2 CFR 200.421?

- Have all components of cost in our outreach plan been determined to be necessary?

- Have we conducted the required budget evaluation so we don't commit resources to outreach activities that our funding cannot support?

Reasonableness of Costs

- Have we analyzed the Reasonableness of Costs in accordance with 2 CFR 200.404?

- In the prudent person theory, our organization must consider:

  a. Would a prudent person use federal funds to purchase such items?

  b. Under the same conditions, if we were personally responsible for funding this cost for this purpose, would we have made the same decision to use our personal funds to fund this cost?

  c. Do internal controls (Memorandum of Understanding (MOU)/Infrastructure Funding Agreement (IFA), policies, sub-recipient agreements, contracts, etc.) that designate/describe outreach activities and/or limits exist?

d. Have we evaluated competitors pricing for this cost and determined our fee is reasonable based on market prices?

e. Has this cost followed local policy (costs for incurring cost, seeking approval for cost, and following documented competitive procurement procedures) if necessary?

Allocability of Costs

o Have we made sure that the outreach communicates the name of the funding the customer will be served under to support cost allocation?

o Has cost been evaluated to identify the benefit funding sources to ensure that when cost is allocated, it is allocated to each funding source in accordance with the proportionate benefit received?

o Has the local cost allocation plan been applied consistently and correctly in the allocation of cost?

o Does the award have any funding limitations (dollar limit or percentage limit) for this type of cost that must not be exceeded?

o Have all local controls for cost allocation been followed to support the allocation of cost?

Supporting Documentation

Have we maintained the support or backup for the cost, which shows:

o We incurred the cost in accordance with local internal policies on incurring cost?

o Acquisition of all necessary approvals from all sources and levels to incur the cost (as applicable)?

o The price is competitively reasonable? Have we documented our Prudent Person decisions?

o What cost was incurred for including necessary details which support the calculation of the fee paid?

o The date or time period the cost was incurred to support the timing of the cash expenditure?

o Proof that the expense was paid and the method of payment?

o Required support for procurement in accordance with local procurement policy?

For allowability, which requires necessity, reasonableness, allocability, and source documentation to support cost, we encourage engagement with your NYSDOL Fiscal Monitor prior to incurring the cost so they can provide guidance on the outreach plan, as well as how to document support for the cost and maintain back-up documentation so that during your annual review you can show the cost was allowable. If our outreach activity is sizeable and requires publishing competitive procurement solicitations in accordance with local policy, we additionally recommend reviewing the local policy and developing an outline to ensure all required supporting documentation is maintained.

Other Intersecting Laws

Which other laws do we need to double check for outreach compliance? [Statutory and Regulatory Uniform Guidance Language Related to Outreach (TEGL 03-23, Attachment I):](#)

- o Accessibility, from Rehabilitation Act of 1973 sec. 508

- o Acknowledging Federal Funding in Public Communications (Stevens Amendment)

- o Advertising and Public Relations Costs, from 2 CFR 200.421, the Uniform Guidance

- o Affirmative Outreach, from 29 CFR 38.40

- o Activities requiring procurement must follow and document procurement policy

(3) Implementation: Fiscal Steps for Implementing Chosen Outreach Efforts

- o *Communication:* Is our outreach activity communicating the following?

  a. Identity: Does the outreach explicitly state the name of the program(s) we are outreaching on behalf of?

  b. Call to Action: Does the outreach effort communicate how the customer can access the services (i.e., a call to action to a physical address/mailing address, web address, phone numbers, or specific staff to assist them)?

  c. Offering: In the most clear, concise, and direct way does the outreach communicate the core benefit of engaging with the program (long-term employment, training, upskilling, work experience exploration, etc.)?

  d. Individual Benefit: Does the outreach campaign show the opportunity this program/service brings to the customer?

- o *Cost Allocation Plan:* Have we identified the appropriate method for cost allocation in accordance with our local policy? Cost must be allocated to the source of funds that are benefitting. If our outreach is to a specific funded population (i.e., out-of-school youth), the expense would be funded with out-of-school youth funds.

- o *Gathering Supporting Documentation:* Have we confirmed our documentation gathering process is following local policy to ensure we have supporting documentation, with all appropriate authorizations for all expenses incurred, including procurement (as applicable)?

- o *Measuring Effectiveness:* Do we have a method to capture data on the effectiveness of our outreach efforts? Are we asking our customers how they learned about our services? Have we organized our collected data to determine which outreach method is working for us?

- o *Future Outreach Methods:* Based on collected data, how do we plan to modify our outreach methods?

- o *Budget Check:* Does the budget need to be modified to fund outreach?