

## EPIC CBO TA Webinar (01-30-2019)

Below is a summary of the CBO webinar; you can watch the full recording of any CBO weekly TA webinar here:

<https://www.illinoisworknet.com/partners/EPIC/Pages/ArchivedTraining.aspx>

### CBO Staff on the Call

A Safe Haven	0	Inspiration Corporation	0	North Lawndale Emp. Network	0
Albany Park Community Center	0	Instituto for Latino Progress	0	OAI, Inc.	1
Asian Human Services	1	Jane Addams Resource Corp.	1	Phalanx Family Services	0
Catholic Charities	0	Lessie Bates DNH	1	Springfield Urban League	1
Central State SER	0	Man-Tra-Con Corporation	1	Tri-County Urban League	1
Homework Hangout	1	National Able Network	2	Two Rivers Regional Council	1

### Dashboard Numbers

**CBOs that have customers in any of the following rows, must have them resolved and out of the row by February 5, 2019.**

Agency as of 1:00 P.M. on 01-30-2019	Application Not Started	2151 Past Due	Enrollment Required	2151A Past Due	Completion Status	SNAP Ineligible
A Safe Haven				1		2
Albany Park Community Center						5
Asian Human Services				1	1	2
Catholic Charities						
Central State SER	7		3			
Homework Hangout						
Inspiration Corporation						
Instituto for Latino Progress						
Jane Addams Resource Corp			1	1	1	
Lessie Bates DNH					3	
Man-Tra-Con Corporation						
National Able Network						
North Lawndale Emp. Network			1			1
OAI, Inc.						1
Phalanx Family Services			7		2	13
Springfield Urban League			1	17 due 1/31	5	
Tri-County Urban League	1	1	1		1	
Two Rivers Regional Council	1		1			1

**Yellow Rows** – Dee sent emails out Monday, January 29<sup>th</sup> regarding Dashboard items that need to be rectified. Thank you to those who were able to complete the assignment. If you were unable to complete the tasks before our call or if you have questions, please call Dee to help clean up the Dashboard. We need to have all yellow rows, for which the CBO's are responsible cleared by the end of February.

### Application Not Started – Appointment has Passed

If you have customers in this row on the Enrolled Dashboard, you will need to upload a new 2151 that reflects one of two things:

- No Contact – If the customer did not show for a rescheduled appointment.
- Referral Rejected – If the customer attended the initial appointment but did not complete the application and never returned. Include this message in the Upload Description area: This customer attended the initial appointment, but never returned to complete the application, therefore we are rejecting this referral.

If the customer has returned, the application must be completed on their next visit to your office. The customer cannot be enrolled or assigned ISTEPs without a completed application.

This may also apply to the row that says: Referral Accepted and Enrollment Started – Enrollment Required. If it does not, then please contact Dee with the customer's number (*name when on phone*) to resolve this.

**Work Experience** – If you have not entered payroll for work experience, our programmer has opened the system to allow you to enter payroll for any customer with a WEX step. The reporting needs to match your line item on the GRS.

#### **TABE/Other Assessments/Credentials –**

TABE scores should be added under the Assessments/Other Assessments. We will check these during our data review visits. If you already entered all TABE/Assessment scores in the assessment section, then you do not have anything else to do. If you have not entered these scores, please update them before our scheduled data review visit. There is a YouTube video, in Partner Resources, demonstrating how to complete this process.

We are most concerned about whether a customer received a stackable/portable credential; i.e. CNC turning, OSHA 30, CNA. There must be consistency in the naming of those credentials across your customers and appropriately marked in the step/credential area.

DHS will be creating and downloading a report entitled **Education Attainment Report**. This is required by FNS for DHS to upload to the customer file in IES. The report reflects the educational and vocational achievements of the customer. You may see a Case Note indicating this action has taken place; you do not have anything to do for this. Once created, the report will be listed, in the 2151A section of the documents, on the Progress page. If you make changes after an Education Attainment Report has been generated, please contact your DHS primary contact for that customer(s) to inform them about the need to regenerate the report.

**Data Review Visits** – During our visits, we are checking to see if all the appropriate items are uploaded to a customer's profile and all steps are appropriately marked to give you the proper credit in your Benchmark Reports, especially for Training Completed, Employment, and Retention. Olivia and Dee are looking for Credentials uploaded (*preferably on the Academic Services portion of the ISTEP*) if earned and Employment Verifications uploaded to the Progress page. During follow-up calls, we will review that these items have been resolved.

**Modifications** – If you require a modification, please contact Tammy ASAP. You can modify up to 10% flex on all areas except for Admin costs. If you exceed the 10% flex, you will need to do a modification.

**In-Person Meeting** – February 22, 2019 in Chicago 9AM – 3PM. There will be some speakers on various programs that you may wish to investigate to continue relationships in different capacities. We will also work with any on-the-spot issues you may have.

#### **Performance and Benchmark Attainment**

Tammy will be forwarding a Performance Report along with a list of customers who are reflected in a Benchmark Report. Many of you have seen a list, that Dee has compiled, based upon this report. She will be completing a new version to accompany the Performance Report. If there are customers, who are inaccurately

reflected, either make corrections based on the list of items below or contact Dee or Tammy to resolve the inaccuracies. We will upload a blank copy to the EPIC Partner Resources page for you to work with your numbers. Customers who have 2 simultaneous 30- jobs that add up to 30+ can possibly be counted as an Employed Benchmark. You must check with Tammy if you have a customer with this situation.

In our data review visits, Dee and Olivia are using a Benchmark Report that Tammy also uses to “score” Benchmark Attainment. Below are the requirements that must be met:

- Assessed and/or Accepted by CBO – Unduplicated
  - Must be created before the date the report is being filtered on.
  - Must be currently marked as Enrolled. (Must have been enrolled at some point or be enrolled)
  - Must have at least one Next Step Activity with their current Agency.
  
- Enrolled into Training – Unduplicated
  - Must qualify for the Assessed and Accepted by CBO row.
  - Must either:
    - Have 4 Career Planning/Job Search Customer Service records with their current agency.
    - Have a Next Step Activity with an Activity Type within the approved collection of Academic Steps with their current agency. This record can have a Started, Unsuccessful Completion, or Successful Completion status. The approved steps are:
      - Attend adult education and literacy classes.
      - Raise your Math and Reading skills to 8.0 through a Bridge Program.
      - Improve your Math and Reading skills.
      - Improve your English language skills to 8.0 through a Bridge program.
      - Improve your English language skills.
      - Complete EPIC Training Program. (Industry-Recognized Certificate Only)
      - Complete EPIC Training Program. (CTE/College Credit)
      - Complete EPIC Training Program. (Work Experience)
      - Work Experience Only.
      - Career Foundations.
  
- Completed Training – Unduplicated
  - Must qualify for the Assessed and Accepted by CBO row.
  - Must have a Next Step Activity with an Activity Type within the approved collection of Academic Steps (*listed above*) with their current agency. The record must have a Successful Completion status.
  
- Employed – Unduplicated
  - Must qualify for the Assessed and Accepted by CBO row.
  - Must have Employer records that were created by someone associated with any CBO.
  - The Employer record date ranges must contain a record that totals at least 1 day.
    - If the record has an End Date, that is used. Otherwise, the Start Date is compared to the date the report is being filtered on.
    - Records created after the report’s filtered date are not considered.
  - Employed 30+ Hours:
    - Must qualify for the Employed row.
    - The Employer’s records for the customer must contains a record with 30+ hours per week.

*These customers do not count toward benchmark achievement.*

- *Employed 30- Hours:*
  - *Must qualify for the Employed row.*
  - *The Employer’s records for the customer must contains a record with less than 30 hours per week.*
  
- Retained – Unduplicated for customers hired at 30+ hours

- Must qualify for the Assessed and Accepted by CBO row.
- Must have Employer records that were created by someone associated with any CBO.
- The Employer record date ranges must either contain a record that totals at least 90 days, or the sum of the records must be at least 180 days.
  - If the record has an End Date, that is used. Otherwise, the Start Date is compared to the date the report is being filtered on.
  - Records created after the report's filtered date are not considered.

Bonus counts include:

- Credential in training.
- Employed in training area.
- Enrolled in additional training or enlisted in the military.

**Illinois Department of Commerce and Economic Opportunity  
Office of Employment and Training  
Performance Achievement and Expenditure Reconciliation  
EPIC PILOT PROGRAM**

**EPIC PILOT PROGRAM**

**Performance Achievement and Expenditure Reconciliation**

Grantee Name:   
Grant Number:

Available for Allowable Expenditures: #DIV/0!  
Actual Funds Expended in GRS:

Performance Measure in GA	Total # Planned per
Enrolled in Training	<input type="text"/>
Completed Training	<input type="text"/>
Employed (30+ hrs)	<input type="text"/>
Retained Employment (90 or 150)	<input type="text"/>

Grant Amount:	<input type="text"/>
Average Cost Per Participant	#DIV/0!

Implementation Funds Not Subject to Performance	\$0
Career Pathway Incentive	#DIV/0!
Funds Available Based on Performance	#DIV/0!
Funds Available to Earn Based on Performance	#DIV/0!

Performance

Performance Measure -Actual	Performance Based on Current Enrollment	Percent of Average Cost	Attributed Cost per Performance Measure	Total Served	Earned Assessed/Potential Performance Earnings	Performance Based on Current Enrolled	Performance Based on Planned Performance
Assessed		30%	#DIV/0!	<input type="text"/>	#DIV/0!		
Enrolled in Training	0	20%	#DIV/0!	<input type="text"/>	\$0	#DIV/0!	#DIV/0!
Completed Training	#DIV/0!	20%	#DIV/0!	<input type="text"/>	#DIV/0!	#DIV/0!	#DIV/0!
Employed (30+ hrs)	#DIV/0!	20%	#DIV/0!	<input type="text"/>	#DIV/0!	#DIV/0!	#DIV/0!
Retained Employment (90 or 150 days)	#DIV/0!	10%	#DIV/0!	<input type="text"/>	#DIV/0!	#DIV/0!	#DIV/0!
Based on Enrolled Potential Remaining Performance to Earned (can not exceed total grant amount):					#DIV/0!		

Career Pathway Incentive	Total Served	Earning Bases
Credential Earned in Career Pathway	<input type="text"/>	#DIV/0!
Employment on Career Pathway	<input type="text"/>	#DIV/0!
Entered Higher Level Training	<input type="text"/>	#DIV/0!
Total		#DIV/0!