Energy Transition Navigator Program

2024-25 Program Manual

Chapter 7: Data Management

Chapter Overview

By the end of this chapter, you will be able to:

- Apply each step in the data management process.
- Utilize data to improve program outcomes.
- Leverage program data to enhance program delivery.
- Identify different approaches for program evaluation.

This chapter will highlight the data management process, the types of data grantees must collect and report, the role of the CEJA Reporting System, and the importance of accurate data management.

Data Management Process

Data is a group of information, facts or statistics which, when analyzed, can be used to understand program outcomes, uncover key insights and patterns, and contribute to informed decision-making and program improvements.

Data management is the administrative process of acquiring, validating, and processing data. Data management for Energy Transition Navigators is done through the CEJA Reporting System for grantee and participant data.

The Energy Transition Navigator Program uses a four-step **data management process** that includes data collection, data entry, quality control, and accurate reporting. This section will highlight data collection, data entry, and quality control.

Data Collection and Entry

Collecting data is a key step in the data management process. Data may come from the grantee's outreach efforts, application forms (Program Application, Pre-screen Assessment), or grantee accounting systems.

Grantee & Program Data

Grantees must collect grantee and program data, which includes information about grantees, their partners, and the services provided. Grantee data includes, but may not be limited to:

- Outreach events held
- Inquiry contacts
- Applicants
- Enrollees
- Employers or other stakeholders engaged

Participant Data

Grantees are expected to collect participant data, including:

- Contact information and demographic information for inquiry contacts
- Application, subsequent enrollment in a CEJA Workforce Program (through coordination from CEJA Workforce Program grantees)

Participant data is collected and analyzed at the individual, grantee, and program levels.

- On the **individual level**, participant data allows grantees to monitor each outreach contact's progress in applying for and enrolling in the program.
- On the **grantee level**, participant data can help grantees identify strengths and gaps in outreach and recruitment outcomes—especially for target populations. Participant data can be used to uncover barriers that may limit grantees' ability to reach certain populations or communities. Participant data will include the number of inquiry contacts, applicants, and enrollees. This data will be used to determine if grantees are meeting their performance targets.
- On the **program level**, Energy Transition Navigator administrators will gather and aggregate outcome data across the different grantees to evaluate whether the program is meeting its intended goals and to recommend changes for future program years.

The table below outlines key participant data that will be collected through the CEJA Reporting System at each stage of the life cycle.

Table 7.1: Participant Data Collection through the Climate Works Life Cycle Stages

Life Cycle Phase	Data Collected
Outreach and Recruitment	Numbers and demographics of inquiry contacts, number of events held.
Application and Intake	Demographic data of applicants and enrollees (age, level of education, race/ethnicity, gender, and veteran status, geography)

Grantees will enter data into the CEJA Reporting System, which provides real-time tracking of grantees' progress. This allows grantees and grant managers to identify early outcome gaps and adjust.

"If it is not documented in the reporting system, it did not happen."

Data Entry Staff

Data entry staff must enter data into the CEJA Reporting System and run reports regularly to ensure data completion and accuracy. The responsibilities of the data entry staff include, but may not be limited to:

- Creating new records and entering information.
- Updating records.
- Running reports to check data accuracy and quality.
- Communicating data and reporting problems to Grant Managers and Illinois workNet support staff.

Data entry staff should have:

- Basic computer skills (typing, navigating the file system, opening program files, and proficiency with basic office software).
- CEJA Reporting System training.
- Access to technical assistance.

All staff responsible for data entry must have easy access to the data collected by program staff and dedicated time built into their schedules for data entry.

Quality Control

Quality control is the process of periodically reviewing data for accuracy. Accurate data are essential to maintaining the integrity of the Energy Transition Navigator Program.

Incorrect Data = Incorrect Reports = Inaccurate Outcomes and Impact Reporting

Staff who collect and enter data must check regularly (the frequency will depend on the data) for errors. Grant managers will verify data that grantees entered into the CEJA Reporting System and notify program administrators when data issues are identified.

See the table below for quality control recommendations.

Table 7.2: Data Quality Assurance Characteristics

Quality Assurance Characteristic	How It is Defined	Data Quality Example
Accuracy	Is the data correct in every detail?	• Is the inquiry contact's name spelled correctly? • Is their date of birth entered correctly?

Completeness	How comprehensive is the data?	• Is the inquiry contact's first and last name recorded? • Is the month, day, and year recorded for their birthdate?
Reliability	Does the data contradict other trusted resources?	• If the inquiry contact has received other state or federal workforce development services, does demographic information (name, age, etc.) match information previously recorded in the CEJA Reporting System?
Relevance	Is the data needed?	• Has all demographic information (age, gender, and Illinois residency, among others) been collected?
Timeliness	Is the data up to date?	• Was an individual's application entered immediately so that it can be shared with the CEJA Workforce Hub or Climate Works grantees?

Accurate Reporting

Accurate reporting is the culmination of data collection, entry, and quality control efforts undertaken by staff. Accurate and timely data entry is critical for accurate reporting and effective continuous program improvement.

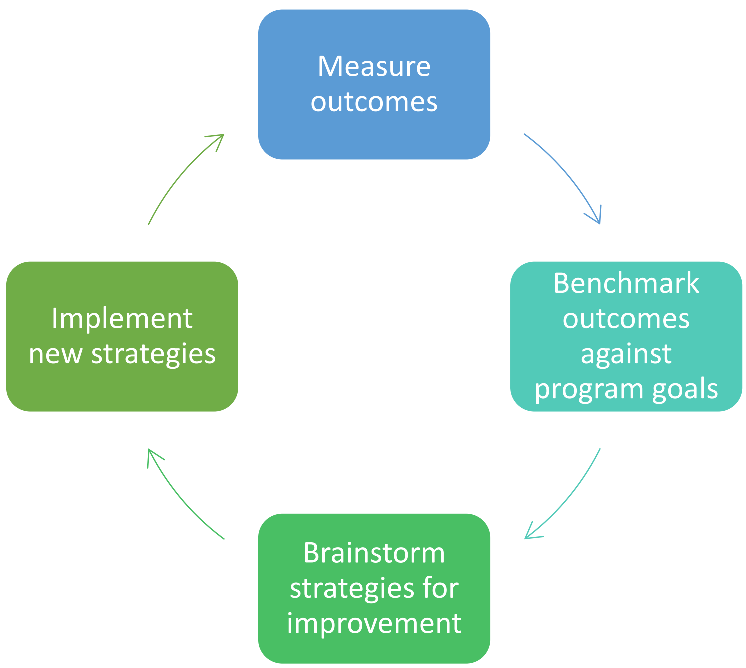
The CEJA Reporting System is a custom database developed in partnership with the Center for Workforce Development at Southern Illinois University (SIU). The **CEJA Reporting System** is located on the Illinois workNet platform and functions as the information hub for all programmatic tracking and most program reporting.

The Illinois workNet Staff offers resources and ongoing technical assistance to all grantees. Grantees are required to have an Illinois workNet profile to utilize the CEJA Reporting System for programmatic tracking. There is no limit on the number of grantee staff that can maintain a profile. However, it is important to remember that with more individuals entering data, there is a greater need for quality control. Grantees are encouraged to have one dedicated person to verify the accuracy of data entry each week. This must occur prior to monthly compliance reviews and be an individual who is different from the person who entered the data. This ensures that the data being entered adheres to quality standards, is entered in real-time, and more importantly, that data problems are addressed.

In addition to robust tracking capabilities, the CEJA Reporting System allows grantees to **run reports** that are required by the program. The dashboard available on the CEJA Reporting System allows grantees to have a snapshot of their performance, according to the data entered.

Continuous Program Improvement

Continuous program improvement is the ongoing assessment of performance to identify ways to improve the program. DCEO requires grantees to develop and implement a continuous improvement plan. Continuous improvement plans are designed to bring improvements to service delivery processes through program performance, measuring outcomes, benchmarking against program goals, brainstorming opportunities for improvement, and implementing new strategies.



Measure Outcomes

Program performance is the degree to which grantees meet their objectives and achieve their goals, which are determined by the outcome measures. This approach is a systematic way of assessing if programs have achieved their goals.

DCEO expects grantees to enter data into the CEJA Reporting System regularly. This allows for live tracking of applicant progress and program outcomes, as well as desk reviews from grant managers.

Note: Failure to keep accurate data may result in poor performance indicators that could ultimately result in the Energy Transition Navigator Program denying the renewal for funding.

Consistent and accurate data collection and data entry allow grantees to access accurate and up-to-date program reports. Reports can be utilized by grantees to monitor their program and determine if goals are being met or if there are performance gaps. Performance gaps are the difference between the program goal and the actual program performance.

Benchmark Performance Outcomes Against Program Goals

Do not wait until the end of the year to determine if your program is meeting its program goals! Continuous program improvement requires that grantees measure outcomes and track performance at regular intervals to see if performance goals are being met. This is called **benchmarking**. The reports and dashboards in the CEJA Reporting System can help grantees benchmark their performance. The CEJA dashboards and reports provide a quick snapshot of actual performance, compared with program goals, exposing any performance gaps.

The **CEJA Dashboard** is focused on the progress that participants are making in getting enrolled, receiving services, and completing the training program. It will be used by Energy Transition Navigators, CEJA Workforce Hub and Climate Works grantees to quickly identify red flags, participant progress, completion rates, and other key participant information. It also tracks participants after they have completed the program. It is focused on active tracking: long-term tracking, and follow-up participant tracking. The dashboard is fueled by the data entered in the CEJA Reporting System by grantees.

Workplan reports will allow grantees to see their progress toward metric goals. Grantees will be able to see and click on the number of individuals who have met each metric. By clicking on the number of individuals for each metric, grantees will be able to drill down to contact and applicant lists and individual contact profiles.

Using the CEJA Dashboard

Each metric on the dashboard has an associated color that indicates if actions are needed for participants and the urgency with which action must be taken.

Table 7.3: CEJA Dashboard Color Code

Color code	Action needed
White	Information, no action needed.
Yellow	Action needed.
Red	Red flag. Immediate action needed.
Green	Complete or meets a program requirement.
Gray	Participant not enrolled or not in program, no action needed.

CEJA Dashboard Sections

The CEJA Dashboard is separated into the following sections:

- Outreach
- Intake
- Referrals

Read-only access will be available for:

- Service Status

- Earned Credentials
- Completion Information
- Transition Outcomes
- Program Follow-up

See the table below for programmatic data, participant data, and red flags for program elements. Energy Transition Navigators are only responsible for entering data into the Outreach and Intake sections, but they will be able to see participants' progress through the Climate Works or CEJA Workforce Hubs, including earned credentials, completion information, and more.

Table 7.4: CEJA Dashboard Sections – Programmatic and Participant Data

CEJA Dashboard Sections	Data Tracked
Outreach	Total number of outreach events; Total number of attendees at outreach events.
Intake	Total individuals with inquiry status; per cohort participants enrolled; total participants not enrolled (decline, not selected); total participants.
Participant Engagement	Total number of active participants; total participants with a training service; participants with an open training service that is past due for attendance entry; total participants with barrier reduction services; total participants with transition services; participants with transition services for more than six months.
Earned Credentials	Total participants who have earned a credential of any type; total/per cohort that have earned a credential.
Completion Information	Total participants/per cohort with withdrawn status; total participants/per cohort who has successfully completed; total participants/per cohort who have exited.
Completed Training Program and Receives Transition Services	Total successfully completed participants with an open transition service; total/per cohort participants who successfully completed and received a transition service; total/per cohort participants, who are hired by a clean energy employer, enrolled in advanced training, or enrolled in a registered apprenticeship program.
Provider and Employer Relationships	Total number of clean energy employer relationships.

Table 7.5: CEJA Dashboard Sections – Red Flags that Pertain to Energy Transition Navigators

CEJA Dashboard Sections	Red Flags
Prescreening	If customer has had inquiry status of prescreen status for more than 30 days.
Intake	After the application is complete, grantees have 10 days to complete the career assessment and service needs assessment before a "red flag" is added, indicating action must be taken to complete the enrollment process.
Referral	If a referral is sent and 10 days have passed with no response; or the response is pending/no contact from customer; or referral for customer is required but has not been sent.

Brainstorming Strategies for Improvement

Through the grant application process, grantees provided outcome metric goals including the number of individuals recruited, enrolled, completed, and transitioned to apprenticeships or jobs. These metrics were initially communicated in the Notice of Funding Opportunity (NOFO), agreed upon during the grant negotiations, and solidified in the Work Plan and grant agreement.

Grantees should refer to their Grantee Work Plan which outlines their outcome metric goals and timelines.

The **CEJA Dashboard** will reveal grantees' current performance in achieving their outcome metrics. Utilizing the dashboards and program reports, grantees can self-identify their current standing in specific areas.

- **Not Meeting Expectations** - Performance outcomes are below expectations. The current trajectory predicts program goals will not be met.
- **Meeting Expectations** - Performance outcomes are within the margins of expectations. The current trajectory predicts program goals will be met.
- **Exceeding Expectations** - Performance outcomes are beyond expectations. The current trajectory predicts the program will exceed goals.

If current strategies are not producing the desired results, new strategies may need to be considered to close performance gaps. Grantees should facilitate brainstorming sessions among their team to discuss ways to improve performance. Grant managers, program managers, and the CEJA Regional Administrators may be included to offer guidance during this process. Other grantees may have ideas for strategies that can be implemented. Grantees will have opportunities to learn from each other during webinars and training sessions.

Consider other groups to consult with to assist with brainstorming strategies to improve performance. Community stakeholders (including community-based organizations, educational institutions, and businesses) may have ideas for recruiting program participants. They often have intimate knowledge of the community and its residents that may provide unique insights. Professional associations might provide industry-specific best practices, evidence-based practices, and/or evidence-informed practices that can be leveraged by the grantee.

Implement New Strategies

Once strategies have been identified to help close a performance gap, the next step is to put them into action:

- Communicate the strategies to all relevant stakeholders and impacted staff.
- Update relevant forms, documents, processes, and procedures.
- If a new skill is involved, train instructors and staff members.
- The new strategies must have a definitive start date and benchmark date (the date Performance Outcomes will be benchmarked against Program Goals to see if there is still a performance gap or if performance has been improved).

Workplan Revisions

Grantees are required to submit a revised Workplan if the grantee is invited to renew their grant into the second and third years of program implementation. This tool communicates how service delivery practices will be improved for optimal program performance in subsequent years.

Program Evaluation

Evaluation takes a deeper look at program data and impacts. It employs empirical analysis to describe the operation of a program, measure the program impacts on outcomes of policy and program interest, and determines the cost-effectiveness of the program with the goal of identifying improvements and best practices.

DCEO's approaches to program evaluation may include, but not be limited to:

- **Participant Satisfaction Survey** – Enrolled participants may be asked to provide feedback on their experience with Energy Transition Navigator staff through a Participant Satisfaction Survey. All responses to this survey are anonymous and do not include personally identifiable individual data. However, grantees will be provided with aggregate information for their cohorts as a tool to improve programming.
- **Implementation Studies** - An implementation study documents program operation or compares it against goals, across locations, or over time. It describes and analyzes "what happened and why" in the design, implementation, administration, and operation of programs and is generally used to determine whether a program is being carried out in a manner consistent with its goals, design, or other planned aspects.
- **Outcome Studies** - An outcome study compares individual outcomes against goals, across programs or locations, or over time. Outcome studies track participant outcomes after they complete or leave their pre-apprenticeship program.
- **Impact Studies** - An impact study estimates the difference in individual outcomes attributable to a specific program or policy. Impact studies determine whether programs or policies measure the intended impacts—that is, the program causes the differences in the outcomes that it is designed to influence.

- **Longitudinal Study** – The DCEO CEJA team may conduct a longitudinal study, a correlational study that documents variables over an extended period. Data for this longitudinal study will include variables such as employment and earning levels after completion. The longitudinal study will assess the effectiveness of:
    - Outreach and recruitment strategies
    - Increasing the entry of women, people of color, formerly incarcerated people, and foster care alumni into clean energy training programs.
    - Increasing the likelihood that women, people of color, formerly incarcerated people, and foster care alumni will complete apprenticeships or enter jobs in clean energy.

These evaluation activities will examine both the Energy Transition Navigator program as a whole and individual grantees and their programs.

Role of Grantees

Grantees will contribute to evaluation studies through their accurate and timely collection and reporting of data in the CEJA Reporting System.

Grantees are expected to fully cooperate with program evaluation activities, which might occur at any point during the grant period. The results of these studies will help inform how the program will be administered in the future.