Notes from Full TST and Workgroup Meetings Held October 19-21, 2020

All Meetings were held Virtually

TST Meeting- Electronic Tracking Tool

Members Present:

Justyn Settles (IDRC), Carlos Gonzalez (WA),Matt Flaherty (MO), Malena Gutierrez (OH), Alex Johnson (IA) Merriam Massey (AZ), Josmary Pearson (IN), Yenny Diaz (NY)

10-19-20

Develop an **electronic tool** to track/document recruiter ID&R efforts

- Identify the areas of work done by recruiters that need to be documented.
- Make a list of those that are needed by the most IDRC States.
- Identify ways these are currently being collected.
- Determine baseline data that all IDRC States should be collecting from recruiter efforts.
- Determine what type of tools could be used to document these efforts.
- Determine if a tool currently exists that can document efforts.
- Determine if a new tool needs to be created by a developer.
- Outline the specifics of the tool.
- Begin creation of the tool.

What needs to be accomplished:

1. Discuss ways that members are currently tracking recruiter efforts.

- Are there other states you like how they track recruiters?

Malena - Ohio - Filemaker Pro system connected to the ECOE

- ECOE uses filemaker pro as well
- Recruiters log into the system and can record what they do
- The recruiters select dates and includes many data points the directors wanted
- Setbacks: Information is only as good as it is reported

- Looking into getting more real live data from recruiters. Something automatic but convenient.
- Setback: System is only online
- For offline use recruiters are given a paper form that they then go and put into the database
- It is a dropdown menu that describes what kind of recruitment activity is being performed
- Can use the data to find out how they are spending their time and efforts
- It gives you a chance to see both statewide picture and the work of individual recruiters
- Ohio has been using the system for a year.
- Created using an internal software design
- Information is collected through the Ipad - Each IPAD has an ID number associated with so the information is automatically imputed in for that recruiter
- Information put in at the end of the day

Alex - Ohio - Zoho creator - Platform where you can design and customize your forms

- Track contacts and employers made by recruiters
- Tracks activities recruiters perform
- Recruiters download app on the phone or can upload online
- Track address, date, time name, type of visit, outcome of visit, coe, number of kids, etc.
- All information entered can be turned into spreadsheets for tracking locations that recruiters have visited, etc.
- Setback: Cost - pay on yearly basis on how many users there are
    - No automated reports
    - Takes some time to pull and organize data
- Can give a regional and statewide view
- Data collected is searchable
- Information is collected by visit (1 form per visit - 30 seconds to 1 minute for completion)
- At the end they click if a coe was obtained or if they did not quality
    - Can input why they did not qualify
- Option to do individual visit or all at once
- System is already connected to their employer database that they are currently using.

Merriam - Arizona

- All recruiters are school lea based so they were filling out time and effort logs on site
- Created a form on Google Drive that recruiters fill out and share a copy with Merriam and their supervisor
- They mentioned if they are full or part time, what percentage MEP does their funding

- They input what activity was performed by 30 minute time slots
- Choose from a drop down menu of type of activities recruiters do
- If they visit a farm they list name, address, person of contact
- What follow up is required and how many children identified
- Whether the child was identified through different types of referrals (msix, community partner survey, etc.)
- How much time do the supervisors spend reviewing the documents?

Josmary Pearson - Indiana

- How much information needs to be in the reports?
- They do not have a daily report that they fill out discussing daily activities
- They have a report that is much more generalized

Yenni - New York

- Regional spreadsheet that includes address of visit, comments on results of visit

Carlos

- Very similar to what is happening in Arizona

Matt - Missouri

- For a long time they used a google form that was filled out after every visit.
- A lot of visits and information being put into a spreadsheet but no one was looking at it
- A data tool for collecting information that cross referenced with parent surveys. Staff could click on their name and see what surveys there were and what needed to be done.
    - All done through powerBI
    - Accessible by recruiters through the web so things had to be coded and they could not include identifiable information
- Now they are using a google sheet to document outreach - the sheet is color coded based on results of the survey

2. Create a list of different types of tools already in existence.

3. Identify the areas of work done by recruiters that need to be documented universally.

- Family visits
- Outcome of the visit - being able to see if the recruiter is getting results with their strategy
- Farm visits
- School Referrals - source of information/leads

- H2A worker visits
- Going door to door
- Office work
- Networking part and tracking contacts made
    - Especially useful during covid or pandemic
- Important to track notes on location - how to get to places, information on safety, etc.
- For school based recruitment it is about ensuring that ID&R activities are being done. Ensuring school based recruiters are getting out of the school and into the field.
- Tracking how much time it takes to get a coe (how long to drive to house, how long to interview)
- Tracking on diversity of activities performed
- Track the workload that recruiters have - input the expectations of how many visits or interviews need to be done, how many surveys there are that need to be followed up on

4. Establish priorities of what should be included.

1. Address/Location and what is being visited
2. Results of visit (COE or DNQ)
3. Comments section
4. Place for follow ups and a way for follow ups to be remembered or acted on
    a. Link to calendar or set up reminders about it
5. Simple, easy, and quick to use interface
6. Reporting capabilities
    a. Individual and big picture reports
    b. Breakdown of how recruiters spend their times
    c. Using reports in official capacity - as time sheet for example
        i. ** Ask SST what would have to done for reports to used in official capacity

5. Determine what type of tool would be most helpful for recruiters. (for example, an electronic type form they fill out that then feeds into this tool, a map that they can put pins of where they went and then fill out info, etc)

- Application on the phone -
    - New York, Indiana, and Arizona all use MIS2000 that requires windows for ECOE
- Most recruiters in Indiana use apple products
- Both being able to be used on tablets or phone. Flexibility to be used in different ways
- Must be able to be used offline
- Connecting with available maps or mapping feature

6. Determine a wish list of what the tracking tool could/should include.

- Make sure form can create a report to show history of recruiting so new recruiters can know what has been done
- Help finding addresses and information on areas that recruiters might not be used to
- For the follow up section a way of setting up reminders or linking it to calendars

- Reflection questions for recruiters? How many employers did you call, how many employers did you connect with? Especially important for cases where regular meetings with reports are not held.
- Something that shows what has and hasn't been down in the region. Automatically add things to the list from the follow up section. Also show what has been completed.
- Remind staff when different seasons are starting
- Way of connecting back to employer after a visit - follow up survey with employer to help fill in information, thanking the employer for talking to recruiter
- Connecting it with a mapping so you can pin your location when an address might not be immediately available
- Connecting with email - way to set up automatic emails with employers or farms.
    - Connecting the state farm list to show contact information and send automatic emails
- Something that shows the best time to reach a farm, speak to a family, or visit a site
- Something that shows if there are already connections or people to contact in farms or businesses
- Some kind of tool similar to waze to give information on an area and what is happening
- Coding that shows who is responsive, who will talk to you.
- Tracking tool also helps recruiters plan their day

7. Brainstorm/research what types of tracking tools exist now.

8. Establish a timeline of next steps.`

- Include possible next meeting date/time for workgroup

Next Steps:

- Answer survey about our brainstorming and creating possible proposals
- Email screenshots of tools currently in use
- Talk to full TST and present what we worked on

- Based on survey results create proposal(s) by Mid-November
- Present at next TST the proposals created from surveys and

Notes from Mapping Tool Workgroup 10-19-20

Members Present:

Jessica Castaneda (IDRC)

Gloria Altamiro (OH)

Robert Gomez (ID)

Starsha Jamerson (MS)

Bruce Lack (MI)

Claudia Mladek (MN)

Laura Puente (KY)

Laurie Stewart (LA)

Maggie Villaroel (MS)

Members provided updates on how each state gathers farm data. All states are gathering it in different ways and all felt that they did not have up to 90% of farm information tracked for their state. Several were using google maps while others are developing their own system.

- **Determine sources of information that can be used to find farms and agribusinesses in IDRC states.**

Members mentioned that much of the data they have gathered was from local data on when recruiters visit farms or when they find them when they are out recruiting. This is then often gathered on excel spreadsheets and put into maps. Currently IDRC can gather information about H2a farms from the Spotlight tool. IDRC can train on how to pull data down or just pull that down for states each month if needed. That is one national source of data. Growers associations are also good sources of data. The groups suggested maybe there was a way to use IDRCs large group numbers to reach out and try to get more data on a national scale. The group also discussed it would be helpful to find a way to scrape data like spotlight does from sites like Manta. Org that has farm data. The federal subsidy database might also be a helpful source if we could also after get more farm information about them through manta.

- **Develop a survey to determine what types of data states are currently gathering or have available at farms and agribusinesses in their states and where the sources of this information are coming from.**

The group decided that it would be helpful to see where states are with gathering ag data. It would be helpful to request them to put the data into an excel spreadsheet that they already had on farms and agribusinesses in their own states. Then we could see if anyone has a comprehensive list and what sources they are using. We could also begin the visual creation of the maps so states could see where they are right now.

The group also discussed the role of the group. They do not feel that it is the groups responsibility to gather all of the farm data for each state but instead it is to help teach states how to gather that information but also assist with national data that we can obtain to help each state as we train them on how to build their own maps with the data we can find for them as well as what they can find.

On the spreadsheet of farm lists that we will use to help put data on the farm tool the following would be included:

Farm Name, address, phone, email, crew leader name, contact information, crops grown

In addition to the data request for agriculture listing information we would ask the following:

What sources do you use to gather your farm and agribusiness data?

Does your state currently use Google Maps? If so in what capacity?

- **Discuss whether this tool should also have the capability to house information about farm visits.**

The group felt it would be helpful to have the capability to house information about farm visits. Information they felt would be helpful was crops, what time of year they are in season, number of workers, if there is housing onsite, if the farm is a priority to visit, notes of the visit, simple overview information about the farm. They also thought it would be helpful to link somehow to the IDR tracking tool being developed.

- **Research different mapping resources already in existence to learn more how they are created.**

The group decided they wanted to stick with a Google type map since they said we need to think about the main purpose of what would be most helpful to recruiters. This would be an individual map for each state.They also liked the idea of a database linked to a map but thought this might be too expensive. They felt that Google maps might be the best tool to enhance at this time. This is a resource that helps them know where they need to go and who they need to contact and then if you can keep notes of when you visit and establish priorities this would be even more helpful. We discussed that several states are just beginning the process of using these maps and others have been using them for years. Discussion was held on how to streamline ag data updates to the tool.

- **Discuss the necessary security measures that this tool should have in place.**

No PPI can be included in any way in the maps. This is a map of farms and agribusinesses. Any information that needs to remain private can be linked to another source on the pin if needed. This would solve the security concerns.

- **Develop a wish list of components that would be helpful for this tool to have.**

States could make their own uploads and updates and have the ability to make farms listed as different priorities in order of when visits need to be made. Adding images would be helpful if possible also. Needs to also work offline.

Establish a timeline of next steps before next TST.

- Creation of survey to the SST and TST groups to request ag data and to survey their use with Google maps
- Research data scraping costs associated and if can be used with a tool like Manta?
- Look at Google Maps ad ins that would be relevant like adding school districts or county lines or other offerings that are available.
- Reach out to Google and see if they would be willing to work with us since we have 26 states involved.
- Creation of H2a lists for all states from the Spotlight tool
- Looking into how states could access their maps and if there is a secure way to have them access them through the IDRC website.
- Be ready by next TST to show them visually through Google Maps where everyone is at that time with additional pins of new national agriculture data we are able to add on.

Virtual Recruiter Training Workgroup

10-20-20

Members Present:

Josmary Pearson/Angela Tackett - Indiana

Luis Cruz - New Mexico

Christina Alvarez - Idaho

Itandewi Mendoza - Nebraska

Jamie Cunningham - Arkansas

Joram Rejouis - New Jersey

Michelle Mattson - Michigan

Yeni Vasquez - Missouri

From the FII:

Develop **training modules** for recruiters/ID&R staff/ID&R coordinators

- Brainstorm training modules ideas.
- Determine what training resources are currently available and make a listing of those trainings and the source of where they can be found.
- Look to find what training subjects are missing, need to be expanded, or need to be developed in a different format.
- Choose specific modules topics that need to be designed by the workgroup.
- Determine what is the best format and design for these to be created in.
- Begin the creation of the new modules.
- Complete new module drafts and send them out to the full workgroup for review and pilot.
- Conduct a pilot of the materials. Gather feedback from the pilot.
- Update modules as suggested by the pilot.

What needs to be accomplished:

- Review the topics listed for recruiter training
- Determine priorities for which training is most needed.
- Determine if there are other needed trainings not mentioned on the list.
- Develop a plan for how trainings can be created/ what format they will use and how they will be provided to recruiters.
- Develop a list of priority trainings the group will work on
- Begin work as a group on the module and make assignments on developing the first training module.
- Establish a timeline of next steps.

How is training done:

Yeni - Missouri - Training is given twice a year

- Coordinator sees common errors on a COE and then uses those to create trainings
- Trainings given based on upcoming events/seasons

- Noticing weaknesses in the program
- Trainings on ways to make recruiting easier
- There is a training this Thursday
- Trainings are often through scenarios given

Josmary - Indiana

- Trainings used to be given by escort twice a year
- The trainings were on basic scenarios and case studies
- They would do mini sweeps and then Escort would identify their weaknesses based on the sweeps
- Not a lot of turnover so a lot of staff are well knowledgeable
- Every wednesday the recruiters are sent out case scenarios and questions from the Guidance

Luis - New Mexico

- Training given twice a year
- Training mostly based on eligibility scenarios to practice their strategies
- The team would meet in the fall and spring to prepare for the summer activities and debrief

Jamie - Arkansas

- Last year the team was restructured so there was a lot of new staff
- When a new recruiter is hired they have an intense several days training
- A full time recruiter goes with a partner for several weeks
- Trainings are given once in the fall and once in the spring.
- Trainings cover eligibility scenarios, and any new guidance or regulations
- Normally the trainings include both tutors and recruiters
- They are moving to a regional model so they are now doing trainings per region
- She carries Missouri brochures for work because she finds so many people from Missouri

Joram - New Jersey

- A combination of everything that has already been said
- Previously they have used escort in the fall for training for all the recruiters
- In the past regional offices have organized trainings
- At the regional level they hold two trainings: 1 in the spring and 1 in the summer
- They use their own proprietary materials and materials from escort
- They have 1 (sometimes up to 4) recruiters in the north and 10 in the southern region
- In the northern region there is a lot of families that stay and stick around

- They have to train each year because the population changes year to year

Michelle - Michigan

- Prior to pandemic once a year in May they would have an annual training with all recruiters, coe approvers, and data people
- Their training usually has 100 people in it
- A lot of eligibility factors and scenarios
- Break down into smaller groups and have interactive activities and in the afternoon each group would be broken down and they would go with their peers.
- The training would cover different strategies
- Now they have been doing one hour webinars weekly
- Bruce takes a lot of information he learns from other states
- They need a place for new recruiters to help them learn and have mentoring
- Using MSIX and Missed enrollment report to find gaps in recruiting

Ita - Nebraska

- They have monthly meetings with recruiters across the state
- Four scheduled trainings with the recruiters throughout the year
- Doing recruiting 101 for new recruiters using the national ID&R manual
- She hopes we can get the information organized and centralized
- Hopes we can use the id&r manual as a structure or template
- Created a powerpoint model following the sequence from the manual
- Now they will begin doing ride alongs

Christina - Idaho

- Idaho is divided into three regions
- There are two state trainings a year and three if there is a conference
- There are quarterly regional visits and quarterly directors meetings
- They meet with districts every other week.
- Focus on community based training - training in the community
- Role playing, scenarios, eligibility scenarios, comments that need to be on the coe, etc.
- New recruiters are partnered with a seasoned recruiter

Topics

Alternative Recruitment Strategies during the pandemic

What to do once you get into an agriculture establishment

Flowcharts of pictures of eligibility for training

Distance Learning Recruitment Techniques

ID&R during natural disasters

Subsequent moves (vacations)

Eligibility modules split into different levels

Safety course for recruiters

*Database of who is working in migrant around the country even those not in the consortium

1. Review the topics listed for recruiter training
    a. Add training on h2a workers and recruiting h2a workers
    b. Training for new recruiters - how not to take things personally - how to evaluate assess if a new recruiter is ready to be in the field alone
    c. Developing action plans and smart goals - how to measure performance
    d. Using data for recruiting
    e. Quality control requirements
    f. Keep adding new scenarios and updating scenarios

2. Determine priorities for which training is most needed.
   1. Scenario Bank split into different difficulties (Recruiting 101, 201, 301, etc.)

   2. Developing a plan on how to go out and recruit and create recruiting goals

   3. Safety Course for Recruiters

      - Can address the pandemic and natural disaster recruiting
      - Being aware of what is around you and what to bring with you
      - Where to draw the line

   4. Recruiter 101 Module - A training for new recruiters

      - Where to find resources for information and where to look if you have a question

   5. Training on sources of information

3. Develop a plan for how trainings can be created/ what format they will use and how they will be provided to recruiters.
      - Make the training preventative rather than cover immediate needs
      - Training done in module packages
      - Having an assessment part of the training that tests knowledge gained to see if they are

ready to advance (like duolingo's process of advancement) and the recruiters are learning

- Making sure trainings align with the non-regulatory guidance and cite where the information is coming
- They have to tell you why you got it wrong
- Done in a way that is both able to be used virtually and in person - one on one or in a group
- Aligning materials with modules with other sources that already exist
- Animated/video aspects -

4. Develop a list of priority trainings the group will work on

5. Begin work as a group on the module and make assignments on developing the first training module.

6. Establish a timeline of next steps.
   a. Workgroup: By October 30th send in 1 basic, one middle, one advanced scenario (with answer)
      a. Send to justynidr@gmail.com
   b. Justyn: Report back to Entire TST on Wednesday 10-21
   c. Justyn: Use notes to create training plan/proposal for the year
   d. Workgroup: Present to entire TST in December the training plan/proposal

IDRC TST Meeting

Virtual Recruiter Assessment/Evaluation Workgroup

10-20-20

Attendees:

Alejandro Cabero	Maria Dominguez - IL
Emily Williams - SC	Ray Melecio - MO/LA

From the FII:

Update the Recruiter Assessment and facilitate usage in the IDRC States

- Review the recruiter competency assessment created by IRRC.
- Determine which questions need to be updated with dates or content.
- Make updates to the current test.
- Develop a question bank that the test can draw from to ensure that as recruiters take the test that it is not the same one from year to year (covers the same content but has multiple questions regarding each topic of eligibility).
- Review the mini quizzes and determine if they need to be updated.
- Promote the use of the assessment and mini quizzes in IDRC States.
- Continue to develop assessment resources as needed.

What Needs to be Done

· Ensure that all of the group is aware of all of the current IDRC assessment tools (Competency skills test https://www.idr-consortium.net/competencyskills.html, IDRC mini quizzes https://www.idr-consortium.net/MiniQuizzes.html)

· Review the data about the current assessments.

· Determine which areas need to have more questions/ assessment resources developed.

· Determine if any of the assessments needs to be updated or if the focus needs to be on new questions for the question banks.

· Begin work on adding additional scenarios and questions for current tests or for the creation of new tests.

· Establish a timeline of next steps.

How states do evaluation/know when recruiters are ready to be in the field?

Emily - SC

- Use the IRRC assessment
- Recruiters must get at least 80% on the assessment
- Spend once or twice in the field with veteran staff
- After a month check in to see how it is going
- Gave out refresher training every summer because they would have interns, new people, and to make sure people are ready for summer recruiting

Maria - IL

- Splits training into two pieces: The first part is basic What is MEP and information on eligibility for new recruiters
- The second part is more advanced and everyone takes the same assessment afterwards.
- In Illinois they use their own because the skill/experience levels are so different.
- The current assessment does not work for more advanced recruiters.
- Also used the 80% result for certification
- Goes back one on one with staff to see why they missed it and review with the lowest scoring results

Ray - MO/LA

- A lot more training is done by shadowing and mentoring

Alejandro - KS

- Finding a lot of little mistakes on the COE
- Missing the fine details

Brainstorm of Ideas

1. Do we want to include Practical skills on the assessment?
    - Creates the issue of whether we need to expand the current assessment or do we want to create a new separate assessment?
    - Including practical skills could be a lot more difficult to assess. Passing the test doesn't necessarily mean that you are a good recruiter.
2. Do we want to create an Assessment concerning the Coronavirus or a Coronavirus Miniquiz?
    - Issues about preparing to go to work
    - Making sure you have all the equipment you have
3. How to assess more experienced recruiters?
    a. The idea of having several tiered assessment
    b. We could create a second assessment for more skilled/experienced recruiters
4. It would be helpful to have assessment or evaluation that covers common mistakes made on the COE
    a. Long term idea: create virtual platform for practice filling out COEs
    b. Create virtual activity to give recruiters the opportunity to check for mistakes on COEs
5. Have different types of assessment/evaluation activities
    a. Kansas created a virtual Jeopardy game for recruiters/teams of recruiters
        i. https://jeopardylabs.com/play/kansas-idr#.Xks1OSG2prs.email
        ii. Alejandro asked for the jeopardy game to be reviewed

   b. Emily Callaghan used to give a training on finding OSY that was interactive and functioned as a choose your own adventure activity
6. Is it possible to cater the assessment more to each states needs?
   a. What customization options are there?
   b. Can states choose what questions are included in their assessment?
   c. Could we create two version of each assessment: one catering more to seasonal work and one catering more to seasonal work
7. Each question should say what category it belongs in

Question/Assessment Review

*Can we see the most common given answer for the question?

- After talking to Jessica after the meeting Justyn will review the questions and try to collect the date on most common answers for the assessment questions

    - Scenario question about Emelio Contreras - 58% get the question right
        - Maria noticed people are reading it quickly, skipping information, making assumptions, and not paying attention
        - Ray asked what the breakdown of what answers are given most for the questions most commonly missed. To help us know why the question is being missed
        - **Put Emelio scenario in the more advanced assessment and have an easier question in the beginner assessment**
- Multiple dates is a problem and several of the commonly missed questions revolve around multiple dates in the question.
- Looking at the question and the concept and not worry so much about the dates
- Difference between labels and tags - Why are some tagged as COE and some tagged as scenarios, etc? We need clarity on the categories and labels to better allow
- Question on Eligible Ages - Keep it in because it is valuable
- Residency Date - Question is good and the answers are good. The question highlights a common gap in recruiter knowledge

Next Steps

- **Workgroup:** Email advanced scenarios to justynidr@gmail.com by November 15th
- **Workgroup:** Email any new topics that need to be covered by the assessment to justynidr@gmail.com by November 15th

- **Workgroup:** Review current assessment to assign questions to basic or advanced assessment and to give category to each question by next TST meeting in December
- **Justyn:** Review the data on the current Assessment and share it with the work group
- **Justyn:** Review assessment to make sure dates are up to date.
- **Justyn:** Send notes to the workgroup
- **Justyn**: Share word file of current assessment to group for review
- **Justyn:** Create mini-quiz on CoronaVirus focusing on recruiter protection and send to TST meeting by November 15th initial presentation for review

Steps for Later:

- After December TST: Review the top 4 most common mistakes seen on COEs in your state
- December TST: Review what topics should be included in an advanced assessment
- December TST: Review the categories and assign categories and not just scenarios

Coordinators Training TST Workgroup meeting

October 20th, 2020 Virtual

Members present

Merced Flores (OR), Cris Young (MN), Sara Stowell (VT), Tena Torgerson (WI), Genoveva Winkler (ID), Emily Callaghan (NY)

Notes from the meeting

The group reviewed the topics from the SST and discussed which ones would be priority.

The following were mentioned:

Hiring and Training Recruiters as a top priority.

A suggestion was made that we look at the idea of creating a coordinator guidance type manual. That way we can look at lot of different topics and include it in the compilation.

The group agreed this was a good format to start with.

Another suggestion was to focus on the duties of an IDR coordinator since so many are given the job without really fully understanding all that it entails.

Discussion was held about helping a coordinator know how to make hard eligibility decisions. Examples were share by the group about topics such as initial processing type jobs, attrition studies, temporary work, areas that are not black and white. The group mentioned that it might be good to look at some of those areas. For example, how to create state policy when needed when certain trends are apparent that might be outside of normal norms.

Discussion was held that the tool that is made by the group should include links to various resources, and PowerPoints, etc instead of only being a document.

The group narrowed their topics to 6 to start out with.

- Duties of an IDR coordinator
- Hiring and training recruiters
- Quality control procedures
- Motivating staff and providing team building training
- Looking into harder qualifying activities that are not the normal things we look into. Such as activities that might appear to be non-qualifying that might be qualifying.
- Documenting processes. How to help coordinators know some of the processes that are good to do this with in their state.

The group discussed each of these in depth and talked about their purpose and some of the challenges coordinators face in each of these areas. They decided it would be helpful to research what is already out there in each of these areas prior to the TST meeting in December. It was decided that between now and Nov 30th the group would research and provide documents, links and resources to a shared Google Drive Folder for the whole group with each member being assigned to a specific topic while sharing any resources they had about the other other topics. This would allow us to be ready for the next TST to go through these topics and being work on one specific topic. The assignments are as follows:

- Emily will work on the Motivating Staff Folder
- Merced on qualify control
- Sara on nonstandard qualifying activities
- Tena on hiring and training recruiters
- Cris on documenting processes
- Genoveva on the duties of an IDR coordinator
- Jessica will create the folders and get them out to everyone as well as add to each folder.

Notes from Data Reconciliation Workgroup

October 20th, 2020- Virtual Meeting

Members Present:

Sean Douglas (ME), Will Messier (NY), Maria Mendoza rep for Eric Stancell (DE), Danielle Waite (NE), Barbie Patch (NH), Linda Fournier (MN)

The group discussed the experience that each member has with data in their state and some of their challenges and what they hoped the group would be able to help them with. NH said they were interested in help with their data plan. ME was interested in learning more in functionality of MSIX and more about the CSPR. They have several people working on data and it is helpful to see more of how it all works together. MN discussed the residency verification and challenges related to that. NE explained their set up and so did NY.

The group also discussed what they felt might be helpful starting points for this project. Some suggestions were to share or develop tools that helped states see:

- What states are doing, when and why in relation to data.
- What are helpful report supports they use and how states are using MSIX reports.

The workgroup reviewed which states are MIS2000 states and which are not. – Most IDRC states are MIS2000 states. There are approximately 8 to 9 non MIS2000 states.

The group discussed the need for the survey to better determine the needs of all IDRC states about Data Reconciliation. The following questions were discussed at length to be included in the survey.

What state data system do you use?

Do you have a state data plan?

Have you ever been in an MSIX audit?

Is your state gathering and entering all the required MSIX Minimum Data Elements?

How hard is it for your state to gather credit accrual and assessment data?

1- Fairly easy 2. Difficult 3. Extremely difficult

Is this data gathered at the local level, regional, or state level?

Please rate the following by choosing the top three areas of concern in relation to Data Reconciliation in your state.

1. **Data Collection**

2. **Data Reporting**
3. **Data Process**
4. **Data Plan**
5. **Data Timeline**

Please comment below on any other Data Reconciliation Concerns you have.

Please rate the following by choosing the top three areas of concern in relation to MSIX in your state.

1. **Minimum Data Elements Alignment**
2. **Timeline of Data Elements**
3. **Organizing and assigning MSIX user roles**
4. **Child Count Issues**
5. **MSIX reports**
6. **Merging Students**

Please comment below on any other MSIX related concerns you have.

Workgroup members then discussed areas they felt that might be a good start on general protocols that were helpful for good data and the discussion changed to the importance of using EXCEL in some areas with data. It was also mentioned that many people are not familiar with tools such as pivot tables, VLookup processes, and in some cases basic things that are available in EXCEL that are valuable when working with MEP data. A suggestion was made to offer training on a basic and advanced EXCEL use with data from the perspective of tools and uses that would be helpful for Data Entry staff working with data. The group decided to offer the training on December 15th and January 12th.

Next steps

As far as next steps we will create the survey this week and ask for states to get it back within a week. Jessica will compile the survey results into a report for all to review prior to the TST meeting in December. In December we will use the data to start the next focus of the group. In addition, at the TST workgroup meeting we will plan out the EXCEL training that will just be for IDRC member states.