

Looking for the Bigger Picture:

Long Term ID&R Planning and Recruiter Evaluation

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Agenda:

In this presentation we will review some helpful activities and tips recruiters and ID&R supervisors can use to create effective and thorough yearly plans. We will also look at how our yearly plan ties into the metrics we use to gauge recruiter success so both recruiters and ID&R supervisors can be confident in their performance.



Why is Creating a Yearly Plan Important?

Creating a yearly plan covering all 12 months is an important step for all states ID&R efforts.

Yearly or annual plans help **set overall direction of ID&R efforts** and **clarifies goals** and important metrics that will be used during the year.



Why is Creating a Yearly Plan Important?

It is important for both individual recruiters and state agencies to have complete and thorough yearly plans. Individual recruiters should make sure that their yearly plan ties into and reflects the state yearly ID&R plan.



What Should a Yearly ID&R Plan Include?

A yearly ID&R Plan should always include:

- Timeline of the tasks/activities that you hope to accomplish during the year
- A balanced approach to ID&R
- Who will be performing what tasks/activities
- Possible contingency plans
- Specific goals you would like to complete during the year



Finding Balance

Balance is critical for all ID&R plans.

When you are building your state's ID&R plan you want to ensure you are performing a wide variety of activities and visit a wide variety of locations.



Finding Balance

When creating your plan, do not focus on only one location. A thorough ID&R Plan should include a wide variety of locations like:

- In school recruiting
- Farms and other agribusinesses
- Seasonal and temporary work
- Community Partners
- Housing sites
- Community locations where workers may hang out



Why is Creating a Yearly Plan Important?

All the work you do throughout the year will be tied into to your yearly plan. The timeline/calendar you create will help organize your daily plans and the individual activities you perform in your daily work should build toward accomplishing the goals you have set.



Why is Creating a Yearly Plan Important?

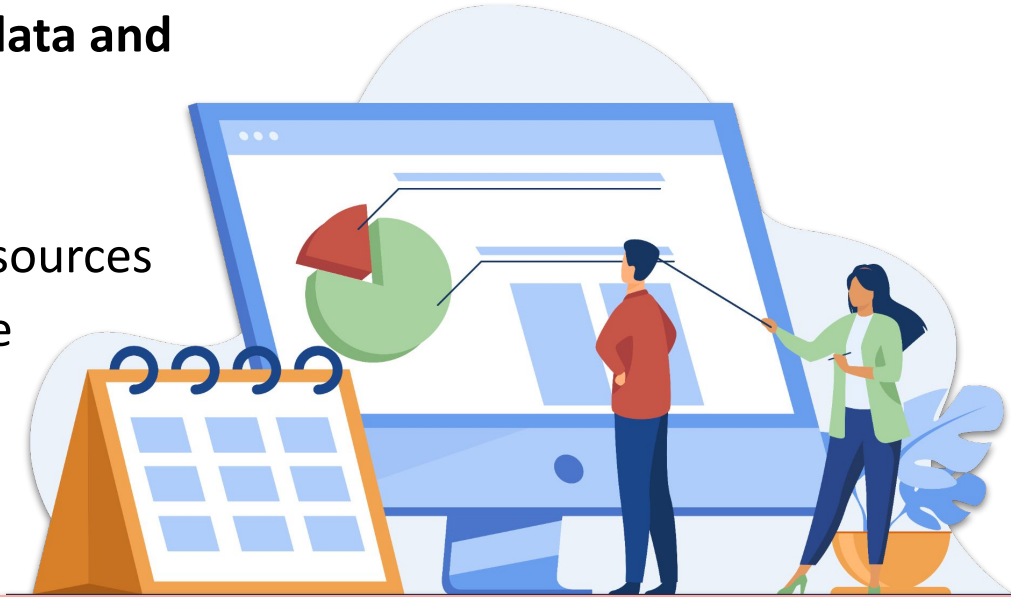
TIP! As a reminder, your ID&R plan is never set in stone. If new information is received, or if you are not seeing desired results you can always make changes to your plan as often as you need to during the year!



Data Collection

Before beginning your yearly plan, it is important for you to gather the data you will use to create your plan. **All ID&R efforts should be data and evidence driven.**

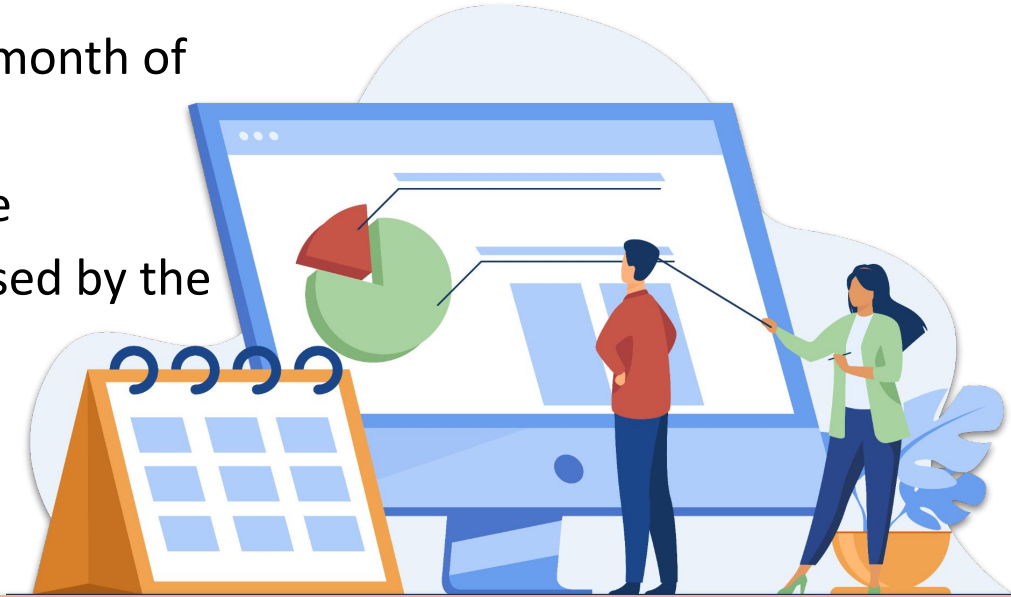
Collect as much data from as many sources as possible to provide a more complete picture of the ID&R landscape.



Data Collection

Data to be Collected:

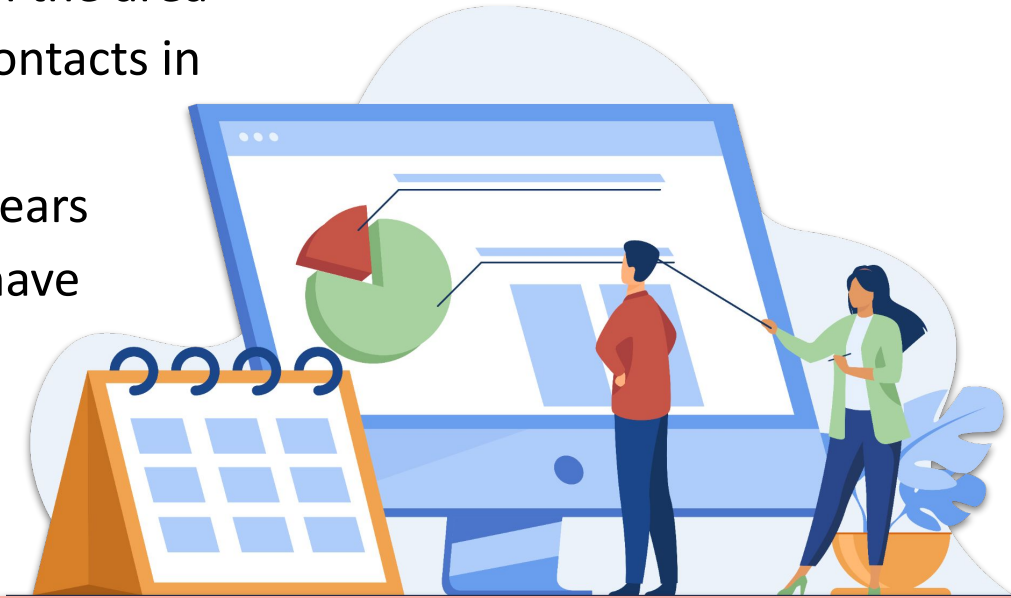
- Lists of students enrolled
- COEs completed broken down by month of completion and location of COE.
- Agricultural trends across the state
- Any previous goals/benchmarks used by the ID&R Team



Data Collection

Data to be Collected:

- Lists of farms and agribusinesses in the area
- Lists of contractors or important contacts in the area
- Recruiting reports from previous years
- Lists of addresses where families have previously lived
- Any additional information you believe could be useful



Data Collection

For more information on data you can collect, visit the IDRC learning portal on the IDRC website. From the learning portal you can watch previous webinars on the data that is available to all recruiters and learn how you can use data to improve your ID&R efforts!

<https://www.idr-consortium.net/Portaldata.html>



Creating a Yearly Plan

To first step in making your yearly plan it is important to know exactly what you have to accomplish during the year and when it needs to be accomplished.



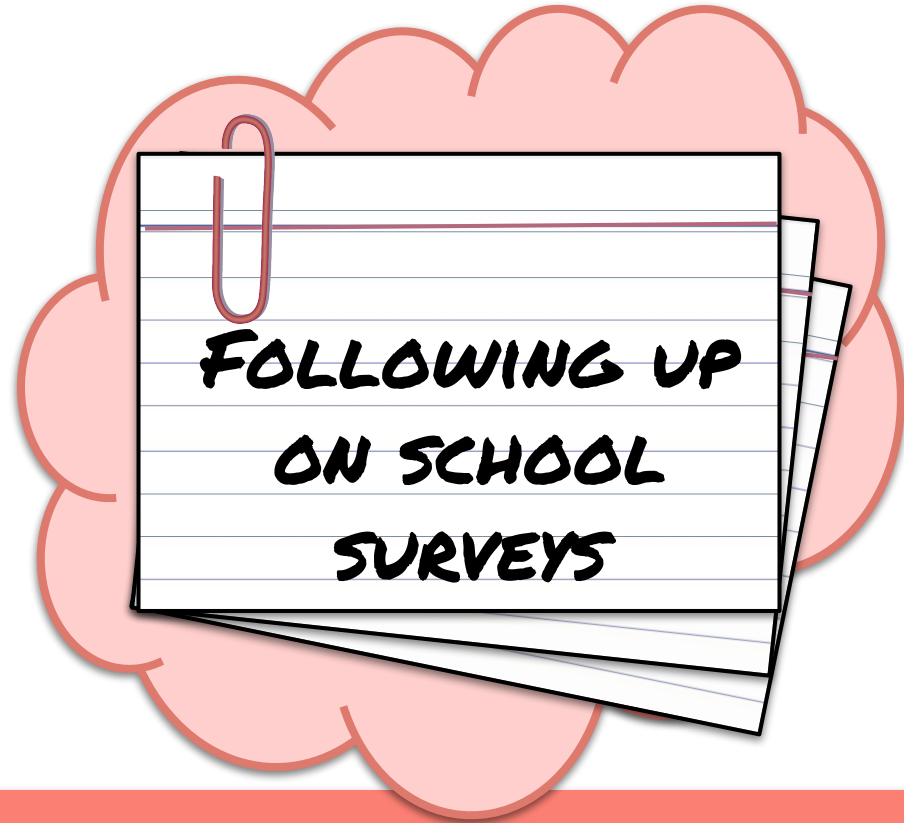
Creating a Yearly Plan

An easy activity to see all the tasks that need to be accomplished is to create a **visual calendar** of all the ID&R activities that will be performed during the year.



Creating Your Visual Calendar Activity

To begin the activity, take a stack of notecards and on each individual card, write a single activity that is performed during the year as a recruiter.



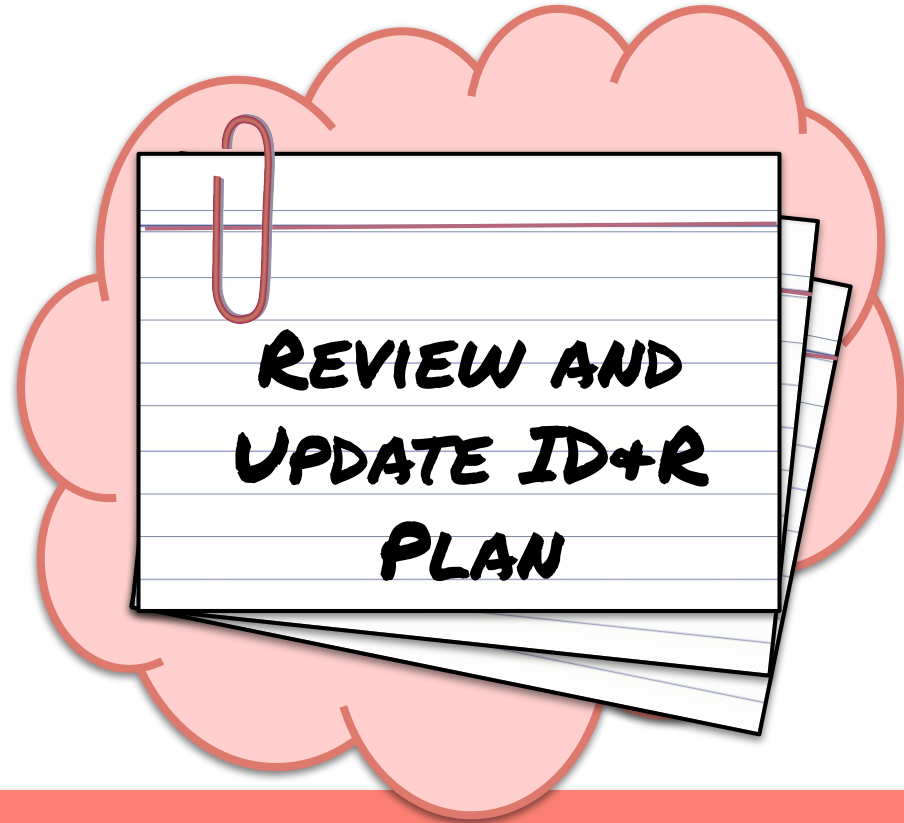
Creating Your Visual Calendar Activity

Activities written on the card should include specific activities such as "conducting re-interviews" and specific crops/agribusinesses that you know are important for your state.



Creating Your Visual Calendar Activity

To make the process easier, start with big picture activities for the state and work your way narrowing your focus to more specific activities.



Creating Your Visual Calendar Activity

Be sure not to forget activities such as training, planning and regular updating of planning, creating resource guides, updating farm lists and maps, and making partnerships in your community.



Creating Your Visual Calendar Activity

Take a minute to think what some activities you might write down for your calendar. **What are some of the crucial activities that you do during the year?**

Let us know what you would write down by typing it into chat!

Creating Your Visual Calendar Activity

Dedicate between **20-30 minutes** to writing your ID&R activities down on the notecards to ensure you are giving yourself time to be thorough.

Whenever possible work with a partner!



Creating Your Calendar Activity

After writing your activities down, lay the cards out and review them to ensure there is nothing that you are missing.



JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEP	OCT	NOV	DEC	
1	1	1	1	1	1	1	1	1	1	1	1	
		2	2	2	2	2	2		2	2	2	
			3	3	3	3	3		3	3	3	
				4	4	4	4		4	4	4	
					5	5	5		5	5	5	
						6	6		6	6	6	
							7		7	7	7	
								8	8	8	8	
									9	9	9	
										10	10	
											11	
												12

Create a 12 month calendar and divide the cards according to the month the activity is performed.

Be aware you may need to make multiples of some cards because the activity is performed multiple times during the year.

JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEP	OCT	NOV	DEC
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
			<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="text"/>	<input type="text"/>
				<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>
					<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>
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Your 12 month Calendar will formulate the foundation for your yearly plan. You can build and expand upon this calendar as you see fit.

Use the calendar to identify the months where you will be very busy and the months that might be slower.

JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEP	OCT	NOV	DEC

The months with the most amount of cards will be your **peak seasons** and will be when you need to plan your best and be most organized.

Peak Seasons

JAN	FEB	MAR	APR	MAY	JUN	JULY	AUG	SEP	OCT	NOV	DEC
<div style="border: 2px solid orange; padding: 5px;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </div>	<div style="border: 2px solid orange; padding: 5px;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </div>	<div style="border: 2px solid orange; padding: 5px;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 2px solid orange; padding: 5px;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </div>	<div style="border: 2px solid orange; padding: 5px;"> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> </div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>

The months with the least amount of cards will be your **slow seasons** and the months where you will need extra planning.

Slow Seasons

Your Timing is Critical

Identification and Recruitment can move quick and it is important you are performing the appropriate activities during the appropriate times. Oftentimes, if you are a week or two late you can miss new students.

Creating a detailed calendar can help ensure that you are always being as effective as possible.



Your Timing is Critical

For example, many states are currently preparing to perform their Re-enrollments. It is important for families to be contacted for re-enrollments at the beginning of the performance period to verify that the data you collect is correct and it allows you to speak to the family and obtain potential leads in a timely manner.



Creating Your Visual Calendar Activity

While reviewing your cards, look for any patterns or groups you can divide the cards into. Look for cards with similar activities but do not to get too specific with the groups.



Creating Your Calendar Activity

Once you have located patterns and separated your cards, assign a name to each group you have created. Write the name down on a separate note card.



Creating Your Calendar Activity

Save the cards with the group names. You can use the group names to help identify your goals and performance metrics for the year.

RECRUITMENT SWEEPS

REFERRAL FOLLOW UP

AGRIBUSINESS VISITS

Creating Your Calendar Activity

Example names for Groups of activities could include:

- Worker Housing Visits
- Quality Control
- Community Agencies
- Business Advertising
- Data Collection
- Planning and Reporting
- Chicken Processing
- Cabbage Farms



Transfer Your Calendar Into a Spreadsheet

For ease of use, you can easily transfer your calendar into a spreadsheet on Microsoft Excel or Google Sheets.

		September		October		November		December	
Activity	Color	Activity	Region	Activity	Region	Activity	Region	Activity	Region
ID&R Team Training	Blue	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All
		Training with Migrant Liaisons: Occupational Survey Review	Office	ESCORT ID&R Forum	All	Training: Using Google Maps for ID&R	All		
MEP Team Activity	Cyan	MEP Statewide Re-enrollments with Service	All			Harvest Festival	Office		
Quality Control Activity	Yellow	Review Procedures for Re-interviews, procedures for answering eligibility questions, and procedures for taking corrective action	ID&R Manager					Review and Update ID&R Manual, ECOE, and Occupational Survey	All
								Review procedures for verifying COEs	ID&R Manager
Mapping and Farm List Documentation	Magenta			Review County Profiles for Updates	All	Mapping County Profiles	All	Mapping County Profiles	All
						Review County Profiles for Updates	All		
Planning Activity	Teal	Tri-Annual Plan Released Round 1 (September - December)	ID&R Manager			Review H2A Worker Requests	ID&R Manager		
								Create Potential Entry into the Field Covid-19 plan (Phase 1, Phase 2, and Phase 3)	ID&R Manager

Example Yearly ID&R Plan

Transfer Your Calendar Into a Spreadsheet

List the months of the year in the columns on the top row.

	A	B	C	D	E	F	G	H	I	J
			September		October		November		December	
1	Activity	Color	Activity	Region	Activity	Region	Activity	Region	Activity	Region
2			Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All
3	ID&R Team Training		Training with Migrant Liaisons: Occupational Survey Review	Office	ESCORT ID&R Team	All	Training: Using Google Maps for ID&R	All		
4										
5										
6			MEP Statewide Requirements with Service	All			Harvest Festival	Office		
7										
8										
9	Quality Control Activity		Review Procedures for Re-interviews, procedures for answering eligibility questions, and procedures for taking corrective action	ID&R Manager					Review and Update ID&R Manual, ECOE, and Occupational Survey	All
10									Review procedures for verifying COEs	ID&R Manager
11					Review County Profiles for Updates	All	Mapping County Profiles	All	Mapping County Profiles	All
12	Mapping and Farm List Documentation						Review County Profiles for Updates	All		
13							Review H2A Worker Requests	ID&R Manager		
14			Tri-Annual Plan Released Round 1 (September - December)	ID&R Manager					Create Potential Entry into the Field Covid-19 plan (Phase 1, Phase 2, and Phase 3)	ID&R Manager
15	Planning Activity									
16										
17										
18										

Example Yearly ID&R Plan

Transfer Your Calendar Into a Spreadsheet

List the names of the grouped categories in the rows in the first column.

	A	B	C	D	E	F	G	H	I	J
			September		October		November		December	
	Activity	Color	Activity	Region	Activity	Region	Activity	Region	Activity	Region
3	ID&R Team Training	Blue	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All
4			Training with Migrant Liaisons: Occupational Survey Review	Office	ESCORT ID&R Forum	All	Training: Using Google Maps for ID&R	All		
7	MEP Team Activity	Cyan	MEP Statewide Re-enrollments with Service	All			Harvest Festival	Office		
9	Quality Control Activity	Yellow	Review Procedures for Re-interviews, procedures for answering eligibility questions, and procedures for taking corrective action	ID&R Manager					Review and Update ID&R Manual, ECOE, and Occupational Survey	All
10								Review procedures for verifying COEs	ID&R Manager	
11	Mapping and Farm List Documentation	Magenta			Review County Profiles for Updates	All	Mapping County Profiles	All	Mapping County Profiles	All
12							Review County Profiles for Updates	All		
13								Review H2A Worker Requests	ID&R Manager	
14	Planning Activity	Teal	Tri-Annual Plan Released Round 1 (September - December)	ID&R Manager					Create Potential Entry into the Field Covid-19 plan (Phase 1, Phase 2, and Phase 3)	ID&R Manager
15										

Example Yearly ID&R Plan

Transfer Your Calendar Into a Spreadsheet

Write the activities in the row of their group and under the column of the month the activity will be performed.

	A	B	C	D	E	F	G	H	I	J
	Activity	Color	September	Region	October	Region	November	Region	December	Region
3	ID&R Team Training	Blue	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All
4			Training with Migrant Liaisons: Occupational Survey Review	Office	ESCORT ID&R Forum	All	Training: Using Google Maps for ID&R	All		
6	MEP Team Activity	Cyan	MEP Statewide Re-enrollments with Service	All			Harvest Festival	Office		
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15										

Example Yearly ID&R Plan

Transfer Your Calendar Into a Spreadsheet

Tip! In the second row, you can add a column for assigning activities to certain recruiters, indicate the priority of the activity, or where the activity will be performed

	A	B	C	D	E	F	G	H	I	J
1			September		October		November		December	
2	Activity	Color	Activity	Region	Activity	Region	Activity	Region	Activity	Region
3			Participate in ID&R Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All
4	ID&R Team Training		Training with Migrant Liaisons: Occupational Survey Review	Office	ESCORT ID&R Forum	All	Training: Using Google Maps for ID&R	All		
5										
6			MEP Statewide Re-enrollments with Service	All			Harvest Festival	Office		
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15	Planning Activity									
16										
17										
18										

Example Yearly ID&R Plan

Transfer Your Calendar Into a Spreadsheet

Add each group to the spreadsheet individually to make organization easier.

		September		October		November		December	
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ID&R Team Training	Blue	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All
		Training with Migrant Liaisons: Occupational Survey Review	Office	ESCORT ID&R Forum	All	Training: Using Google Maps for ID&R	All		
MEP Team Activity	Cyan	MEP Statewide Re-enrollments with Service	All			Harvest Festival	Office		
Quality Control Activity	Yellow	Review Procedures for Re-interviews, procedures for answering eligibility questions, and procedures for taking corrective action	ID&R Manager					Review and Update ID&R Manual, ECOE, and Occupational Survey	All
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Mapping and Farm List Documentation	Magenta			Review County Profiles for Updates	All	Mapping County Profiles	All	Mapping County Profiles	All
						Review County Profiles for Updates	All		
Planning Activity	Teal	Tri-Annual Plan Released Round 1 (September - December)	ID&R Manager			Review H2A Worker Requests	ID&R Manager	Creates Potential Entry into the Field Covid-19 plan (Phase 1, Phase 2, and Phase 3)	ID&R Manager

Example Yearly ID&R Plan

Transfer Your Calendar Into a Spreadsheet

Tip! You may need to merge some cells to make the Spreadsheet easier to read.

		September		October		November		December	
Activity	Color	Activity	Region	Activity	Region	Activity	Region	Activity	Region
ID&R Team Training	Blue	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All
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Example Yearly ID&R Plan

Transfer Your Calendar Into a Spreadsheet

Once completed you will have a complete and organized calendar of everything you want to accomplish during the year ready to share or print.

	A	B	C	D	E	F	G	H	I	J
			September		October		November		December	
	Activity	Color	Activity	Region	Activity	Region	Activity	Region	Activity	Region
1										
2										
3	ID&R Team Training	Blue	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All	Participate in ID&R Team Buddy System	All
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18										

Example Yearly ID&R Plan

Creating Your Yearly Goals

Use your cards to help construct your goals for the year.

Review your groups of activities and choose the 5-6 groups you want to focus on during the year. Choose the groups that will be most impactful for recruiting and for the team. You can base your goals around these groups of activities.



Creating Your Yearly Goals

Choose your goals in such a way that you are emphasizing and encouraging a well balanced approach to Identification and Recruitment.

Choose goals that are varied and encourage recruiters to explore their communities, visit new locations, recruit both seasonal and temporary workers, and visit a wide range of locations in their communities.



Creating Your Yearly Goals

For example, you could choose groupings like:

- Agribusinesses
- Community Partnerships
- Housing Visits
- Professional Development
- Quality Control
- Recruitment Sweeps
- School Recruitment



Creating Your Yearly Goals

Setting Goals give recruiters targets to aim for and can help recruiters to organize their thoughts.

Make sure the goals that you set follow the S.M.A.R.T. guidelines.

S

SPECIFIC

Your goal is direct, detailed, and meaningful.

M

MEASURABLE

Your goal is quantifiable to track progress or success.

A

ATTAINABLE

Your goal is realistic and you have the tools and/or resources to attain it.

R

RELEVANT

Your goal aligns with your company mission.

T

TIME-BASED

Your goal has a deadline.

Creating Your Yearly Goals: Example Goals

Agribusinesses: Staff will visit 30 agribusinesses per month.

Community Partnerships: Recruiters will attend 4 meetings a month with at least 4 different community partners.

Housing Visits: Staff will visit $\frac{3}{4}$ of all H2A housing sites within 30 days of H2A workers arriving.

Professional Development: Staff will receive at least 1 ID&R training every quarter.



Creating Your Yearly Goals: Example Goals

Quality Control: 50 Re-interviews will be completed by July 1st and will return an error rate of 2% or less.

Recruitment Sweeps: Staff will complete 2 recruitment sweeps in the state by August 30

In School Recruitment: Recruiters will follow up on all referrals submitted by school districts within two weeks of receiving the referral.



Creating Your Yearly Goals

To learn more about setting S.M.A.R.T. goals, you can now view the webinar "**Hitting the Target: Creating a Daily Plan and S.M.A.R.T. Goals**" on IDRC's new Youtube channel!

<https://www.youtube.com/watch?v=N1i1N2llxmc>

Subscribe today to see for free all webinars previously released by IDRC.



Measuring Recruiter Performance

It can be difficult to gauge recruiter performance.

Many times ID&R staff's instinct is to gauge performance only on the number of COEs collected or students enrolled.

However, COEs collected is only a by-product of the many things that a successful does.



Measuring Recruiter Performance

If we only gauge recruiter performance based on COEs or students enrolled, it can be detrimental to recruiters and how they view themselves.

If recruiters only focus on COEs or students enrolled they can get burned out during slower times or when recruiting becomes difficult.



Measuring Recruiter Performance

Recruiting is as much about collecting and following up on information and building relationships within the community as it is about enrolling new students.

The data and information collected by recruiters is one of key ways to measure recruiter performance. It is important for ID&R supervisors to review recruiter reports to evaluate the data the recruiter is collecting and to ensure information is being Followed up on in a timely fashion.



Measuring Recruiter Performance

In addition to reviewing recruiting reports to assess the data recruiters are collecting, states also need to establish performance targets and benchmarks to measure recruiter performance.

When creating these benchmarks, they should reflect the totality of the work that recruiters do while working in the field and from home.



Measuring Recruiter Performance

For example, some helpful benchmarks to measure recruiter performance can include:

- How many conversations have been had in a week?
- How much time has been spent in conversations with farmers or farmworkers?
- How many housing sites have been visited?
- How many community partners have been contacted?



Measuring Recruiter Performance

Like with your goals, you want your performance benchmarks to be Specific, measurable, and time bound.

You also want to make sure that you create sufficient reporting to collect the data you need for your benchmarks. **You may have to get creative for how you will collect the data.**



Using Connecteam for Custom Reports

IDRC has been using Connecteam to collect data for the last year. Connecteam is a great platform to help you create the reports and data collection tools you need to properly evaluate recruiters in your state.

To learn more about Connecteam, view the Connecteam page on IDRC's learning portal:

<https://www.idr-consortium.net/PortalConnecteam.html>



IDRC Facebook Page

IDRC has a new Facebook page everyone can follow.

We will unveiling new tools and resources on the IDRC Facebook page before they are announced in the monthly newsletter!

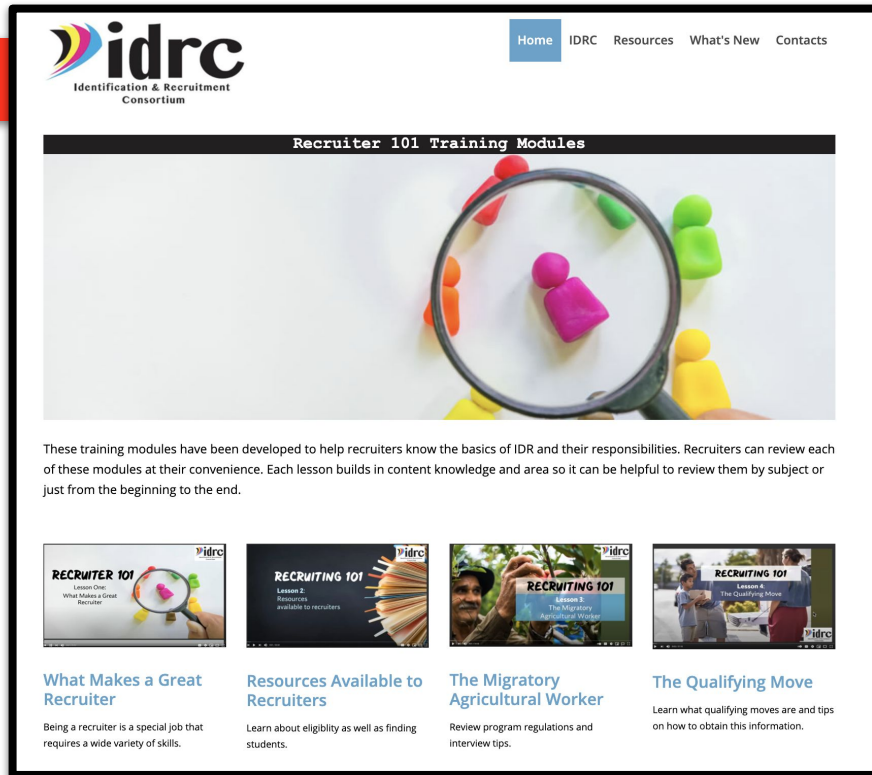


www.facebook.com/identificationandrecruitment

Recruiting 101 Module

The IDRC Recruiting 101 module is not available on the IDRC website.

Recruiting 101 is a series of lessons designed to help equip new recruiters with what they need to know to be successful.



idrc
Identification & Recruitment Consortium

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Recruiter 101 Training Modules

These training modules have been developed to help recruiters know the basics of IDR and their responsibilities. Recruiters can review each of these modules at their convenience. Each lesson builds in content knowledge and area so it can be helpful to review them by subject or just from the beginning to the end.

RECRUITER 101
Lesson One: What Makes a Great Recruiter

What Makes a Great Recruiter
Being a recruiter is a special job that requires a wide variety of skills.

RECRUITING 101
Lesson 2: Resources available to recruiters

Resources Available to Recruiters
Learn about eligibility as well as finding students.

RECRUITING 101
Lesson 3: The Migratory Agricultural Worker

The Migratory Agricultural Worker
Review program regulations and interview tips.

RECRUITING 101
Lesson 4: The Qualifying Move

The Qualifying Move
Learn what qualifying moves are and tips on how to obtain this information.

<https://www.idr-consortium.net/Recruiter101.html>

Training Review:

Please fill out the IDRC Training review form by using the link below or the scanning the QR code with the phone's camera

Training title:

Looking for the Bigger Picture

<https://www.surveymonkey.com/r/IDRCStaffTrainingEval20-21>



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thank you