

Career and Technical Education (CTE) Incentive Grant Best Practices Technical Assistance - June 2024 Transcript

June 19, 2024, 2:48AM

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Kargel, Nancy P - DWD 0:07

Welcome to our technical assistance on Best Practices for the Career and Technical Education Incentive Grant program.

My name is Nancy Kargel.

I am the DWD CTE Incentive Grant program lead.

We want district staff members to have resources and training that support program implementation.

This is the third in a series of five technical assistance sessions that provide resources and training to support career and technical education

(CTE) Incentive Grant program implementation for school district staff members.

The Overview and Onboarding session provides program context.

It's ideal for newly assigned staff, those who need information for making decisions on which certifications to support in their district, and people who want to refresher.

The Document Preparation session provides details needed to submit the required documents and reduce the chances of an ineligible claim or one that needs to be corrected.

This technical assistance,

Best Practices, provides tips and resources for districts or schools to manage their use of the program and ensure smooth operations through transitions.

The annual claim submission process session is revised each year and supports district and school staff in submitting high quality claims and reduce denied claims.

It is released each June.

The Correcting and Verifying CTE Incentive Grant Claims session provides details on how to use the claim portal's editing and verification features.

The purpose of this session is to provide districts with resources to help them overcome challenges associated with transitions, staff turnover, internal communications and communication with the program lead.

Our agenda today includes managing your district's local program, planning for

transition and succession, a quality control checklist, and contact information for getting answers to your questions.

This slide has a list of ideas that districts can consider incorporating into their local program implementation.

Consider which of the following ideas might support your district.

Each idea will have a specific suggestion in later slides.

Some of the suggestions are repeated across ideas because you might choose to adopt only some of these.

Create a CTE incentive grant folder and save it in a common records area.

Create a calendar based work plan with assigned responsibilities.

Create a secure subfolder to hold confidential records.

Create a local onboarding CTE

Incentive Grant staff toolkit.

Plan for easy succession or temporary duties during a leave of absence.

Use electronic calendars to stay on track and meet deadlines.

Use a quality control checklist.

The first tip is to create a CTE Incentive Grant folder and save it in a common records area.

Organize it in a way that supports your records disposition and retention requirements.

Consider using the following. Pick and choose which best support your district.

Many of these items are detailed in upcoming slides.

Program records, including email, contacts, meeting notes, the certifications that your district offers, software version and equipment purchase records, and local decisions.

A saved final verification report from each year. A CTE work plan and electronic calendar that are living documents. Include action plans and benchmarks. A secure subfolder for confidential records. A checklist of annual tasks and keep it up to date.

Include names so that all CTE Incentive Grant staff know what needs immediate attention,

what is coming up, and who is responsible.

Resources with web page links and contact information for local, DPI, and DWD CTE incentive grant staff. Include your own district certification program contacts and other district resources. An onboarding toolkit tailored to your district's resources and needs, created so that a new staff person can access it independently and

quickly know the program, what they need to do, when it needs to be done, and how to get details on how to do it.

This is really important when the claims submitter leaves at the end of one school year and a brand new person is hired to start in September and may have many competing priorities before the claim deadline.

Identify staff members who will have access to the folder, and remember to grant and control their access.

Another tip is to create a calendar-based work plan with responsibilities.

Set short and long term goals for your CTE program as it relates to the incentive grant program.

List all CTE incentive grant program tasks.

Use a list to help craft benchmarks that support the goals you've made.

Assign responsibilities.

Also embed them into assignees, formal work duties, and position descriptions to support smooth staff transitions.

Place tasks and assignments on the electronic calendar associated with a common folder. Add benchmarks to the calendar. Add to the calendar important dates, events, conferences, vacations, leave time or retirements, etcetera, that might interfere with meetings, deadlines and other due dates.

Be sure to include anything that is related to printing certificates, requesting transcripts, and collecting information from students, such as registry numbers for student completion awards or CNA certification.

Schedule periodic meetings of CTE Incentive Grant staff based on the assignments and program goals.

Store the work plan in the common records area folder.

Assign an owner of the work plan and calendar and decide how the calendar will be updated,

the frequency, by whom, and any processes associated with getting the information to the person or people responsible for updating it.

Review the work plan regularly and revise it when needed.

Consider creating a secure subfolder and include the following a personally identifiable information (PII) policy.

You might include the following in a policy. Your district's expectations, rules, policies regarding student data privacy. A process to remove or add program staff access to the information. Include student certificates and other claim documentation.

Limit access to only the staff members responsible for creating or using the information and a supervisor.

Create an onboarding CTE

Incentive Grant staff toolkit. Store the toolkit in the CTE Incentive Grants folder in the common records area. Assign "Onboard new CTE Incentive Grant staff" as a duty of the supervisor and embed it into the supervisor's formal duties.

Consider including the following. A list of tasks with priorities and assignments noted.

Include "Bookmark the DWD CTE web page" on the list of tasks. The DWD CTE web page is where updates are posted.

Have a contacts list with responsibilities.

Specify who is responsible for notifying the program lead of changes in the district's CTE contacts for the district superintendent and the day-to-day claim communication.

Specify how that person will know when contact information has to be changed.

Include a list of approved certifications that the district offers and the documentation that is required for each one.

Include the contact information of the certification sales representatives, software versions, receipts, etcetera.

Create a recurring calendar with a general timeline of the program cycle. It runs from June to June, and you can find a version in one of DWD's online technical assistance sessions.

You can grab a screenshot of it and copy and paste it into your toolkit. Include on the calendar the district's timeline for major activities like annual planning, gathering documentation, doing a quality control check on certification documents, submitting claims, checking up on YA and graduation paperwork having been provided before their deadlines, etcetera. You might include in your toolkit your links to local, DPI, and DWD CTE Incentive Grant resources, including the online training that's available through the Training and Resources tab on the DWD CTE web page.

In my experience, missed deadlines and poor communication usually happen due to staff transitions and the supervisors not having onboarding tools or resources for the newly assigned staff.

This slide helps a district plan for easy succession or temporary access during leaves

of absence.

Ensure that newly hired staff will have easy access to the information they need.

This is especially important when the new staff member starts at the beginning of the school year and has the responsibility of submitting claims by the end of September and may be overwhelmed with the new job, competing priorities and impending deadlines.

Consider how to make your district's onboarding toolkit user friendly and intuitive so that new staff can work through it independently.

Ensure that all CTE incentive grant records are saved in the designated folders.

Establish and document local CTE Incentive Grant procedures, especially those involving collecting or preparing documentation, quality control, finalizing claims, correcting claims, and the financial aspects of grant funds. Include in the procedures who is responsible for doing each part of the process and when. In cases of permanent changes in staff duties, ensure that the DWD CTE program lead is notified of which contacts to remove and who to add to mailing lists. If a temporary leave of absence occurs during critical time periods, such as September, March, April, May and June, be sure you know how you'll keep your staff updated.

Consider having one or more staff members added to the auto generated contacts list that the claims portal system generates an early October of each year.

Do this by contacting the DWD CTE program lead in early October of each year, or anytime you need it done, so that the additional contacts can be manually added to the mass email distribution list used for notifications of deadlines, available training, etcetera.

Formerly embed CTE Incentive Grant tasks into staff members' assigned duties, especially but not limited to the supervisors of staff members who need to be onboarded.

Ideally, the supervisors have "Onboard CTE Incentive Grant staff" formally articulated in their position descriptions.

Make electronic calendars work for your CTE Incentive Grant program.

Create a group calendar. Schedule check in meetings to give staff a sense of team, ensure joint and individual accountability, and encourage sharing information at the local, regional, and state levels. Include meetings that involve planning for the program in the upcoming school year so that all team members are informed and have the ability to contribute to the local program.

Also include meetings related to grants that may use or impact the grants. Of course, include major deadlines like claims submission, claims editing, and claims verification.

Consider including other deadlines specific to your district and departments, expirations of software licenses, etcetera.

Consider adding reminders like, "Check the DWD CTE web page" monthly.

Consider adding an event in early October each year, like, "Notify the DWD CTE lead of additional local contacts."

Encourage incentive grant staff to maintain their own electronic calendars with their own tasks.

Include the tasks assigned to them.

Consider adding to their own calendar the tasks done by others that are prerequisites to their tasks, as well as those that depend on their tasks.

For example, confirm with John that he can get all CNA forms to me by May 25th or collect registry numbers and or transcripts from students for student completion awards by May 30th.

Double check registry numbers.

These little notes can help keep everything on track when someone is out unexpectedly.

Determine the program quality control measures that you want taken in your district. You may use the quality control or QC checklist to get you started.

It's available under the training and Resources tab on the DWD CTE web page, available through the QR code on this slide.

Adapt it to your resources and needs.

If you're also doing the electronic calendar in the common folder, you can use this list to help generate what will get put on the common folders electronic calendar.

These next slides provide contacts, resources, and assistance.

You can reach the incentive grant program lead at Det CTE grants at dwd.wisconsin.gov or by calling 6087333887.

You have access to web based resources and assistance through the DWD CTE web page.

Once on the landing page, you can find technical assistance, approved certification lists, forms updates, etcetera.

DPI's resources include its own CTE web page.

If you have difficulty with or questions about the CTE TIG claims Portal, you can

submit a help ticket using the link in Wise Dash or using the link provided on the slide.

Thank you for participating in the CTE incentive grant program and supporting your students as they prepare for careers.

This concludes this training session.

Please remember to view the other training sessions available through the DWD CTE, web pages, training and resources section.

- **Kargel, Nancy P - DWD** stopped transcription